



PROTECTION, GENDER, AND INCLUSION

ORGANISATIONAL ASSESSMENT TOOLKIT

Annexes and Tools
IFRC 2022



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ANNEX 1. LANDSCAPE REVIEW

To complete the PGI Landscape Review, this scorecard will assist you in rating your organisations progress with the following score marks in the box marked "Score": **3**-Achieved, **2**-Partly achieved, **1**-Not achieved, **0**-not applicable or **D**-don't know.

Name of the organisation					
Names and roles of the persons completing this assessment					
Date of completion					
General Comments					
How PGI has been integrated in your National Society / Delegation	Score	Justification for score	Evidence and supporting documents (list and attach)	Total score	Priority
Theme 1: Institutional capacity, composition and commitment to address violence, discrimination and exclusion					
1.1 Has the leadership signalled its commitment to work on PGI?					
1.2 Is PGI embedded in your organisation's policies, processes, strategies, and tools?					
1.3 Is there a dedicated budget and funding for PGI activities?					
1.4 Does the organisation have qualified staff to support PGI actions?					
1.5 Does the organisation train staff and volunteers on PGI issues and the PGI minimum standards in emergencies?					
1.6 Has your organisation conducted organisational development processes for PGI (e.g., Gender and Diversity Organisational Assessment, PGI Landscape Review, Safeguarding Assessments? PGI Organisational Assessment, Gender Audit)?					
1.7 Does your organisation reflect the diversity of the community/ies with which it works?					

How PGI has been integrated in your National Society / Delegation	Score	Justification for score	Supporting documents (list and attach)	Total score	Priority
Theme 1.8: Institutional protection mechanisms are in place to address violence, discrimination, and exclusion					
1.8.1 Does the organisation have policies and procedures in place for safeguarding, Preventing Sexual Exploitation and Abuse (PSEA), harassment, discrimination, bullying including sexual harassment?					
1.8.2 Has the leadership of the National Society signalled its commitment to work on PSEA?					
1.8.3 Are there systems in place to conduct background check of staff, and volunteers? including, at a minimum, reference checks for sexual misconduct and a self-declaration by the candidate that they have never been involved in Sexual Exploitation and Abuse (SEA)?					
1.8.4 Does the organization train all staff and volunteers on the Code of Conduct, expected standards of behaviour and actions to take i.e., prompt reporting of concerns?					
1.8.5 Do staff, volunteers, and people of all genders, ages and abilities in affected communities understand expected standards of behaviour and how to report safeguarding or protection concerns?					
1.8.6 Does the organisation have a referral system for survivors of SEA to specialised services, based on their needs and consent?					
1.8.7 Does the organization ensure prompt and effective investigation and response to allegations of SEA, child safeguarding allegations and sexual harassment?					

How PGI has been integrated in your National Society / Delegation	Score	Justification for score	Evidence and supporting documents (list and attach)	Total score	Priority
Theme 2: A comprehensive protection, Gender and Inclusion (PGI) approach is adopted across all programmes, operations and services.					
2.1 Is Sex, age, disability disaggregated data (SADDD), collected, and analysed in all assessments, programmes, and operations?					
2.2 Is a PGI analysis, including (SADDD), used for programme design and in emergency responses to identify, target, and adapt the response to the needs of those in at-risk or in vulnerable situations?					
2.3 Are the Minimum Standards for PGI in emergencies used in design, implementation, monitoring and evaluation of the emergency response?					
2.4 Are the Minimum Standards for PGI in emergencies used in programme design, implementation, monitoring and evaluation? Are Minimum Standards also applied to post-emergency, recovery, and long-term programmes?					
2.5 Is a PGI Marker ¹ systematically applied across all programmes?					
2.6 Does the organisation have programmes and services to prevent, respond and mitigate risks of violence, discrimination, or exclusion towards specifically affected groups? ² For example, by building disability accessible latrines, or distributing hygiene kits that address menstrual hygiene needs and ensure access to sexual and reproductive health etc..					
2.7 Does the organisation include specialised PGI activities in emergencies or long-term programmes? ³					

¹ IFRC's PGI Marker is a tool that assesses to what extent humanitarian action integrates protection, gender (and diversity) and inclusion. For all EPOAs for Appeals and DREFS the systematic application of the PGI Marker from the PGIIE toolkit is recommended, [see tool 2.2](#) in the Toolkit. This can also be adopted for non-emergency projects. If your National Society, due to specific donor requirement etc., use another - similar marker, to assess and track PGI mainstreaming, such as [ECHO's Gender and Age Marker](#) or [IASC Gender with Age Marker](#).

² This could include but is not limited to: - Survivors or people at risk of sexual and gender-based violence (SGBV). - Survivors and people at risk of trafficking, - Persons with disabilities. - Children and adults separated from their families (RFL). - Sexual and gender minorities (including SOGIESC/LGBTQI+). - Women and girls. - Racialised people, ethnic and religious minorities.

³ Activities may be integrated, or stand-alone services specifically aiming to prevent or respond to violence, discrimination, and exclusion. These are typically carried out by PGI-trained and dedicated staff, volunteers equipped with necessary resources. For example, case management of survivors, specialised services for SGBV and trafficking survivors, prevention, and response of xenophobia, racism, and toxic/fearful masculinities.

How PGI has been integrated in your National Society / Delegation	Score	Justification for score	Evidence and supporting documents (list and attach)	Total score	Priority
Theme 3: Advocacy, diplomacy, partnerships and learning are conducted to influence standards, within the Movement and beyond					
3.1 Does your organisation conduct advocacy, communication campaigns or humanitarian diplomacy to raise awareness on issues of violence, discrimination, or exclusion towards specifically affected groups?					
3.2 Has your organisation conducted research on PGI issues, learnt from past programmes, or produced evidence-based material?					
3.3 Is PGI identified as area of cooperation in existing partnership agreements with IFRC, ICRC and other NSs?					
3.4 Does the organisation participate in national, regional, or global PGI-related networks? (including within the Movement)					
3.5 Has the organisation entered into partnership agreements with local organisations, such as disabled persons' and women's organisations, as well as international NGOs where PGI is a specific area of cooperation?					
3.6 Does the organisation participate in national and sub-national PGI-related coordination forums?					

ANNEX 2. ORGANISATIONAL ASSESSMENT

Theme 1: Institutional capacity, composition and commitment						Total score for theme	
Leadership's commitment to PGI							
Points	1	1	1	2	2	Total score	Comments
1. The Governing Board takes responsibility for the organization's commitments to PGI	The board complete a PGI awareness session or training as part of orientation.	The board endorses the organisation's budget in support of PGI activities, and requests reports included in annual and or official reports	A board member is designated as "PGI champion", responsible for monitoring implementation of the NS plan and advocating for PGI related areas within the organisation.	The board receives and acts on progress reports on PGI issues within the organisation. ⁴	The board takes responsibility and ownership of its role in supporting PGI, diversity and inclusion. ⁵		
Justification:							
Points	1	1	1	2	2	Total score	Comments
2. Senior management leads the organisation's commitment to PGI	Senior management completes a PGI awareness session or training as part of orientation.	The organisation signs Red Cross Red Crescent resolutions and pledges related to PGI and has a plan to adopt them. ⁶	A member of senior management is designated a "PGI champion", responsible for monitoring implementation of the NS plan and advocating for PGI related areas within the organisation. ⁷	Senior management regularly receives and acts on progress reports on PGI issues, including progress in diversifying management, staff, and volunteer composition.	Senior management takes responsibility and ownership of its role in supporting PGI, diversity and inclusion.		
Justification:							
Points	1	1	1	2	2	Total score	Comments
3. Policy, Strategy, frameworks	PGI is embedded in policies, strategies, plans.	The organisation has PGI specific policies, and strategies.	Staff and volunteers are aware of the IFRC and NS commitments to PGI and how these relate to their work.	The implementation of Policies and strategies are reviewed and monitored against PGI sensitive indicators.	PGI Policies, strategies, and frameworks are implemented, monitored, and revised against measurable indicators.		
Justification:							

⁴ This could include regular updates on diversity of management, staff, and volunteers.

⁵ This could include regular gender and diversity audits.

⁶ For example, PGI Policy, PGI Operational Framework, Child Safeguarding Policy, PSEA Policy, etc.

⁷ For example, coordinates and oversees an intra-department working group on PGI that can be established after the OAT.

PGI Resources, knowledge, skills and competencies							
Points	1	1	1	2	2	Total score	Comments
4. Resources & Budget allocations for PGI	Administration, Finance and Resource staff receive training on PGI-sensitive budgeting.	PGI is included in funding requirements and appeals for emergency response budgets and plans.	Resource Mobilisation have a strategy to ensure funds for core PGI commitments. ⁸	All operational budgets demonstrate a minimum allocation for core PGI commitments. ⁹	Sufficient funds are earmarked annually to strengthen institutional and operational commitments to PGI ¹⁰		
Justification:							
Points	1	1	1	2	2	Total score	Comments
5. PGI Personnel	The Organisation has a PGI Focal Point.	PGI focal points are identified and designated across units, teams, and departments.	The organisation maintains a full time PGI expert. ¹¹	The NS has a dedicated team, unit, or department of PGI experts.	Personnel assigned to PGI-related tasks have clear ToRs; appropriate knowledge, skills, and time. ¹²		
Justification:							
Points	1	1	1	2	2	Total score	Comments
6. Technical knowledge, guidelines, and capacity	All Personnel are staff, volunteers, management, and senior leadership are trained on PGI Foundational Competencies. ¹³	Personnel have access to training and opportunities to build their capacity and competency in PGI.	The organisation provides advanced training to develop competencies in PGI and diversity issues. ¹⁴	Personnel have opportunities to become Trainer of the Trainers to further build PGI capacity. ToTs are verified.	The organisation qualifies and trains PGI experts that contribute to the IFRC Membership internationally. ¹⁵		
Justification:							

⁸ Including Safeguarding commitments

⁹ This can be reflected by using PGIIE Minimum Standards guidance, or following gender/PGI-sensitive budgeting norms

¹⁰ For example, to advance safeguarding mechanisms

¹¹ This could be a PGI Officer and/or PGI Advisor

¹² This is to ensure they can efficiently implement the organisation's institutional, operational and programme commitments to PGI

¹³ This includes policies and mechanisms, such as Code of Conduct, Prevention of Sexual Exploitation and Abuse, Child Protection, and Anti-Harassment

¹⁴ In areas such as: disability inclusion, SOGIESC, child protection, SGBV, Trafficking in Persons and PSEA and, case management

¹⁵ Rapid response personnel, thematic experts and or technical leads

Diversity and inclusion							
Points	1	1	1	2	2	Total score	Comments
7. Improved gender and diversity composition of the Governing Board	The Governing Board makes efforts to improve its own gender and diversity composition.	Sex, Age, Disability Disaggregated Data concerning the composition of the Governing Board is collected and reported annually.	Policies and plans are in place to ensure the Governing Board has gender balance and is composed of representative groups from the society. ¹⁶	Organisation statutes and internal regulations actively promote balanced and fair, gender and diversity representation within the Governing Board.	Governing Board, monitors and acts on improving inclusion within the organisation.		
Justification:							
Points	1	1	1	2	2	Total score	Comments
8. Improved gender and diversity composition in all levels of the organisation	Organisation makes effort to improve the gender and diversity composition of staff. ¹⁷	Sex, Age, Disability Disaggregated Data of management and staff is collected and reported annually.	Policies and strategies are in place to ensure opportunities are transparent and inclusive. ¹⁸	Organisation statutes and internal regulations actively promote balanced and fair, gender and diversity representation within the Organisation.	Organisation monitors and acts on improving inclusion within the organisation.		
Justification:							
Points	1	1	1	2	2	Total score	Comments
9. Volunteer network has a fair gender and diversity balance and is representative of the communities in which they serve	Active efforts are made to improve the gender and diversity of volunteers.	Sex, Age, Disability Disaggregated Data on volunteers is collected and reported annually.	Policies and strategies are in place ensure opportunities are transparent and inclusive.	Organisation statutes and internal regulations actively promote balanced and fair, gender and diversity representation within the organisation	Organisation, monitors and acts on improving inclusion of volunteers within the organisation.		
Justification:							

¹⁶ Including youth and underrepresented groups in the community

¹⁷ Actions are undertaken to increase the number of staff from under- represented groups/identities groups (where two candidates are equally qualified for a job, the candidate from the underrepresented gender/group is preferred).

¹⁸ Leadership establishes and enforces proactive strategies to recruit and promote the participation of under-represented groups, based on their gender and or diversity, including in senior management positions- these strategies address unequal opportunities, treatment

People and diversity management							
Points	1	1	1	2	2	Total score	Comments
10. People and Diversity management	All personnel can form and participate in initiatives that promote a safe and inclusive workplace.	Offices have facilities that are accessible, culturally appropriate, gender-sensitive, and adapted for persons with disabilities. ¹⁹	Organisation takes action to ensure people can balance their work and personal life (e.g., flexible working times, remote work, childcare facilities at the workplace, etc.) ²⁰	Management is trained and assessed on competencies related to managing diverse teams in a safe and inclusive manner.	HR, Senior Management, and the Governing Board have a strategy to actively monitor and promote safe and inclusive workplaces. ²¹		
Justification:							
Points	1	1	1	2	2	Total score	Comments
11. Internal reporting mechanisms	There is a system of in place to report harassment, discrimination & exploitation, by personnel.	All staff and volunteers are aware of reporting mechanisms and how they function. ²²	Managers are trained to prevent, and respond harassment, discrimination & exploitation by personnel.	Channels to report harassment, discrimination & exploitation are reviewed for their effectiveness. ²³	The organisation continually communicates to staff and volunteers the implementation and gaps of reporting mechanisms.		
Justification:							
Points	1	1	1	2	2	Total score	Comments
12. Safeguarding policies and framework	Staff and volunteers are aware of the IFRC and NS commitments to Safeguarding and how these relate to their work.	The organisation has specific Safeguarding policies, and strategies.	The organisation consistently enforces a zero-tolerance policy.	The implementation Safeguarding Policies and strategies are reviewed and monitored against PGI sensitive indicators. ²⁴	PGI Policies, strategies, and frameworks are implemented, monitored, and revised against measurable indicators. Results are continuously communicated to personnel.		
Justification:							

¹⁹ e.g., toilets are sex-segregated or unisex, well-lit, and safe locking; parking lots and ramps for wheelchairs, signs in Braille language; prayer rooms, etc.

²⁰ HR policies and procedures consider the needs of staff and volunteers, accounting for gender equality and diversity dimensions

²¹ Including regulations which proactively support equal gender participation, diversity and inclusion and promote equal access to opportunities for career/professional development. Specific measures are adopted to eliminate/correct pay gaps and disparities when these are detected. based on needs of different genders, diverse groups, people with disabilities in the organisation

²² These mechanisms are included in induction trainings/briefings for new staff/volunteers

²³ Including level of trust by personnel.

²⁴ Including the maintenance of a Safeguarding Risk Register

Points	1	1	1	2	2	Total score	Comments
13. Response and Handling Safeguarding violations	Functioning standard operating procedures (SOPs) for responding to and handling reports of misconduct are in place. ²⁵	All staff and volunteers are familiar with these SOPs.	The organisation has functional referral mechanisms, demonstrate a survivor centred approach.	Policies ensure, the safeguarding infrastructure protects whistle-blowers, and that reports are investigated in an independent, confidential, transparent, and timely manner.	Leadership and HR lead the organisation in safeguarding and demonstrate zero tolerance and proportionate response.		
Justification:							
Theme 2: Protection, Gender and Inclusion in programmes, operations and services						Total score for theme	
Protection, Gender, and Inclusion considerations are included throughout the project cycle (planning, implementation, monitoring, evaluation, lessons learnt and reporting)							
Points	1	1	1	2	2	Total score	Comments
14. Programme planning and design	Diverse groups are included in all assessments and inform the different stages of the programme cycle.	A PGI analysis serves as a basis for project/ programme planning and design.	Project/programme planning is influenced by an analysis of PGI-sensitive indicators.	Learning and feedback opportunities are embedded into programme implementation. ²⁶	Planned Project/ programme activities are aligned with IFRC's PGI Minimum Standards in Emergencies. ²⁷		
Justification:							
Points	1	1	1	2	2	Total score	Comments
15. Monitoring, evaluation, and reporting	Monitoring, evaluation, and reporting describes impact on diverse groups within targeted group.	Project/programme monitoring, evaluation and reporting include PGI- sensitive indicators.	A PGI marker is used to track PGI integration during the planning, design, and implementation of projects/programme and emergency responses.	PGI Minimum Standards and the Scorecard are used to monitor project/ programme/ emergency operations.	Systems are in place to monitor, evaluate and report on impact of projects/programmes against desired result and intended goals. ²⁸		
Justification:							

²⁵ SOPs to include specific and appropriate provisions for child protection

²⁶ Such opportunities may include direct engagement with community members, indigenous or religious leaders and external partners to support change in gender relations and promote equality. Learning is aims to capture how to promote gender equality, respect for diversity, prevention of violence, discrimination, and exclusion.

²⁷ As per as per sector specific requirements and guidelines (health, WASH, shelter, etc.)

²⁸ As per as per sector specific requirements and guidelines (health, WASH, shelter, etc.)

Points	1	1	1	2	2	Total score	Comments
16. Disaggregated data by sex, age, disability, and other relevant diversity factors	Disaggregated data is collected in project/ programmes.	SADDD is analysed to improve understanding of different needs and protection risks of communities. ²⁹	SADDD is systematically used to inform at all stages of the project/ programme cycle).	A data protection mechanism is established to ensure safety and confidentiality of data concerning individuals participating in the project/programme.	SADDD informs organisational strategy and plan to improve reach and relevance in long-term planning.		
Justification:							
Protection, Gender, and Inclusion activities and services							
Points	1	1	1	2	2	Total score	Comments
17. PGI activities are developed and implemented in emergencies and long-term programmes	PGI analysis serves as the basis for understanding risks, capacities and needs within communities.	PGI Minimum standards are implemented across all sectors.	The organisation understands patterns of violence, exclusion, discrimination in its context.	Standalone services for PGI are in place, sustainable have a clear transition/and exit strategy. ³⁰	Comprehensive and holistic case management is provided for people exposed to violence, exploitation, and abuse.		
Justification:							
Points	1	1	1	2	2	Total score	Comments
18. Participation, Engagement and Accountability	Different members of the community play an active role in the decision-making processes that affect them.	The organisation has functional referral mechanisms, and support systems for victims and survivors of SEA based on a survivor centred approach.	Projects/Programmes act on community data and adjust accordingly.	The organisation revises its approach to reach different groups to ensure safe, dignified engagement of community members, including marginalised and at-risk groups.	The organisation is systematically guided by an analysis of diverse community perspectives.		
Justification:							

²⁹ Including the impact that the project/programme has on different groups within the community, and to ensure that barriers to reaching vulnerable individuals and groups are addressed and reduced. Data analysis is used to adapt activities and ensure that intended targeted groups and the vulnerable are reached, included and engaged.

³⁰ For example: DAPS Centre, Child Friendly Space

Theme 3: Advocacy, diplomacy, partnerships and learning						Total score for theme	
Influencing standards, norms, laws, and behaviours, learning							
Points	1	1	1	2	2	Total score	Comments
19. Advocacy, Communication and Humanitarian Diplomacy	The organisation engages in awareness-raising, communication, and outreach initiatives. ³¹	The organisation participates in advocacy, communications, and diplomacy in PGI areas.	The organisation conducts evidence-based advocacy and action to change practices and behaviours related to PGI.	The organisation actively advocates and promotes its PGI commitment. Senior management regularly communicates on PGI issues and actions organisation wide.	The organisation has an advocacy and communications strategy for PGI issues that is regularly monitored and measured for effectiveness.		
Justification:							
Within-the-Movement partnerships and collaboration							
Points	1	1	1	2	2	Total score	Comments
20. PGI partnerships within the Movement	The organisation coordinates activities across branches, within delegations.	The NS participates in RC/RC global and regional networks on PGI.	The NS collaborates with ICRC, IFRC and/or other NS on initiatives to strengthen the Movement's overall PGI capacities. ³²	PGI is identified as a strategic area of cooperation in the context of partnership agreements with IFRC, ICRC and other National Societies.	The organisation is recognised as a leader within the IFRC PGI Network.		
Justification:							

³¹ Initiatives on topics related to violence, discrimination or exclusion towards specific groups; e.g., trafficking, children's protection women's rights, minorities and migrants' rights, etc.

³² For example: "in Movement's approaches to protection and reinforcing PGI within RFL systems."

Partnerships and collaboration with external actors							
Points	1	1	1	2	2	Total score	Comments
21. External PGI partnerships	The organisation participates in initiatives that demonstrate to strengthen the Movement's overall PGI capacities.	The organisation participates in PGI networks and coordination groups. ³³	Advocacy and programme collaboration and partnerships are established. ³⁴	The organisation has a strategy to form external partnerships that is monitored and measured for effectiveness. Including partnership to meet commitments to safeguarding. ³⁵	The Organisation is recognised as a core contributor to external partnerships.		
Justification:							
Points	1	1	1	2	2	Total score	Comments
22. Learning	The organisation regularly collects lessons learned from PGI operations, activities, and advocacy.	PGI learning across other sectors and units is compiled.	The organisation participates in learning for a related to PGI.	The organisation has a learning strategy that incorporates PGI.	Leadership builds a conducive environment for reflection, experimentation, and innovation in PGI.		
Justification:							

³³ For example: in country, such as, national women's networks, and humanitarian coordination cluster groups

³⁴ For example: with non-RC/RC organisations for specific groups such as women's, youth, people with disability organisations

³⁵ Including women led groups special interest organisations

ANNEX 3. GLOSSARY

Terms that relate to people (especially in the context of violence, discrimination, and exclusion) are often acceptable or preferable in one national, cultural, situational, or temporal context, but not in another.

Access – Programmes and operations of the National Societies and IFRC should provide access for all individuals and groups. Accordingly, the selection and prioritisation criteria for accessing humanitarian facilities, goods, services and protection must be informed by a gender and diversity analysis to ensure that the assistance and protection reach the most vulnerable. Four dimensions of accessibility can be identified in relation to assistance and protection: non-discrimination, physical accessibility, economic accessibility or affordability and information accessibility.

Accountability – refers to the mutual responsibility of all components of the Movement to use their power and resources ethically and responsibly to put the interests of people and communities they aim to serve at the centre of decision-making, thereby ensuring that humanitarian actions lead to the best possible outcomes and results for them, while protecting and preserving their rights and dignity and increasing their resilience to face situations of vulnerability and crisis.

Child – is defined as any person under the age of 18 years. This age defines adulthood as per the United Nations Convention on the Rights of the Child and applies to our work even if local laws and customs differ.

Child protection – refers to the prevention of, and response to, abuse, neglect, exploitation, and violence against children.

Child safeguarding – Refers to the broad obligation on IFRC personnel, partners, suppliers, and contractors to ensure that the design and delivery of programmes and organisational programmes are in the best interests of the child, do not expose children to adverse impacts, including the risk of violence, abuse, exploitation, or neglect and that any concerns about children's safety within the communities where they work are appropriately reported and responded to.

Community Engagement and Accountability – refers to ways of working collaboratively with people and communities to ensure that Red Cross and Red Crescent actions are effective, inclusive, sustainable and accountable, and that they contribute to supporting and enabling people and communities to lead and shape positive, sustainable changes in their own lives and on their own terms.

Dignity – For the Red Cross and Red Crescent, human dignity means respect for the life and integrity of individuals. The right to life with dignity is embedded firmly in the fundamental principles of humanity and the humanitarian imperative. All Red Cross and Red Crescent staff and volunteers and programs and operations should contribute to the maintenance and promotion of human dignity. Measures to respect, safeguard and promote the dignity of individuals in situations of extreme vulnerability are not limited to engaging with them in a respectful manner. Respecting, safeguarding and promoting dignity also includes protecting the psychosocial well-being of the affected population and ensuring their physical privacy and specific cultural needs are met.

Disability – results from the interaction between persons with impairments and the attitudinal and environmental barriers that hinder their full and effective participation in society on an equal basis with others. Persons with disabilities/disabled people include those who have long-term physical, mental, intellectual, or sensory impairments.

Disability inclusion – Disability inclusion: Being fully included in society means that persons with disabilities are recognised and valued as equal participants and their rights and requirements are understood as integral to the social and economic order. To achieve full inclusion, an accessible, barrier-free physical and social environment is necessary as well as a change in societies' attitudes towards persons with disabilities.

Diversity – refers to the full range of different social backgrounds and identities that make up populations. It includes, but is not limited to, gender, ethnic origin, nationality or citizenship, age, disability, language, political opinions, religious beliefs, social background, sexual orientation, physical appearance and colour.

Equality versus equity – From an equality perspective, it is assumed that everyone will benefit from the same support. However, individuals may need different types of support and approaches in order to have equal access to assistance and joint decision-making that affects them. By adapting humanitarian work to each individual's needs and background, those affected are being treated equitably.

Excluded groups /excluded people – is used to designate those individuals or groups who are currently experiencing systematic exclusion from access to resources and opportunities and/or from participation in economic, social, political and cultural life, for any reason by other individuals or groups in the same society, whether deliberate or not. It does not imply that being in a situation of exclusion is a permanent state, and that this may change.

Gender – refers to an aspect of people’s socially determined identity that relates to masculinity and femininity – it is not binary. Gender roles vary significantly between cultures and can change over time (including over the course of an individual’s lifetime). Social and structural expectations to gender strongly influence people’s social role, power, rights, and access to resources.

Gender Balance – refers to proportional levels of representation of women and men at all organisational levels – i.e., Red Cross Red Crescent beneficiaries, staff, volunteers, and programming levels (teams of staff, delegates, and volunteers). This is different to gender parity, which refers to equal representation of women and men (quantitative – i.e., 50–50).

Gender sensitive budgeting (PGI sensitive budgeting) – is budgeting that integrates a gender perspective and tracks how budgets respond to gender equality commitment and targets. It considers equality during budget planning and assesses the impact of budget decisions on the situation of all genders, and other identity and diversity related factors.

Gender transformative policies and programmes – aim to change gender norms and promote relationships that are fair and just. Gender transformative programming aims to build equitable social norms and structures; advance individual gender equitable behaviour; transform gender roles; create more gender equitable relationships; and advocate for policy and legislative change to support equitable social systems.

Inclusion – refers to reducing inequalities based on social backgrounds, identities, roles and power relations. Providing inclusive services means giving equitable access to resources for all. In the long term, inclusion also focuses on facilitating access to opportunities and rights for all by addressing, reducing, and ending exclusion, stigma, and discrimination.

Intersectionality – refers to the fact that individuals have several layers to their identities, such as gender, ethnic origin, nationality or citizenship, age, disability, language, political opinions, religious beliefs, social background, sexual orientation, physical appearance and color that are woven together. People suffer discrimination against a combination of these factors. An intersectional perspective emphasizes the importance of looking at these forms of discrimination together and at the same time to understand their compound effects on the individual.

Marginalised groups – is an expression used regularly in PGI guidance and tools and they might also be described as having specific needs, being at risk, vulnerable or excluded. In all cases, marginalised groups are understood to include older people, children (including adolescents), persons with physical, sensory or intellectual disabilities, persons with mental health disabilities, survivors of SGBV, victims of trafficking and people living with HIV/AIDS or other chronic illnesses. In different contexts, other forms of diversity, including ethnicity and nationality or lack thereof, migration and/or legal status, religion, caste, class, sexual and gender minorities, as well as intersectionality between forms of diversity and marginalised groups will be key issues to consider when talking about marginalised groups.

Safeguarding policies – A safeguarding policy makes clear what your organisation or group will do to keep children and adults safe and protected from harm. These policies and relevant guidelines must be supported by good governance, health and safety, financial management, staff supervision and management.

Participation – refers to the full, equal and meaningful involvement of all members of the community in decision making processes and activities that affect their lives. In many societies, traditions continue to exclude women, children, persons with disabilities and marginalised groups from decisions and activities. Participation in National Societies and IFRC programs and operations is an essential foundation of people’s right to life with dignity affirmed in the Code of Conduct for the International Red Cross and Red Crescent and Non-Governmental Organisations and Non-governmental Organisations in disaster relief.

Protection – is about keeping people safe from harm. It aims to ensure that the rights of individuals are upheld by preserving the physical, psychological, and emotional safety, integrity, and dignity of those at risk of, or affected, by violence, discrimination, and exclusion.³⁶ The Inter-Agency Standing Committee's definition of protection is the most commonly accepted by humanitarian actors (including the Movement): "all activities aimed at obtaining full respect for the rights of the individual in accordance with the letter and the spirit of the relevant bodies of law (i.e. human rights law, international humanitarian law and refugee law)". Protection in humanitarian action in the Movement has both internal and external aspects. Internally, it refers to ensuring that the actions of the Movement respect, and do not endanger, the dignity, safety and rights of persons. Externally, it refers to action intended to ensure that authorities and other actors respect their obligations and the rights of individuals.

Protection, Gender and Inclusion analysis – is an analysis of how each individual is affected differently by disasters and crises, based on pre-existing uneven power relations, -structures and access to basic resources and how this leads to different levels of vulnerability, capacity, risks and exposure to violence.

Protection Gender and Inclusion Organisational Assessment Toolkit (PGI OAT) – A collection of assessments, tools and guides to support National Societies and IFRC Delegations to better understand their current capacity in PGI.

PGI Champions – are staff, volunteers, governing board members or other within and beyond the IFRC Network that support PGI efforts, provide guidance on influencing decision-making. PGI Champions are effecting change and are not necessarily high-profile figures, but often take a stand to advocate on our issues.

PGI mainstreaming – refers to ensuring that any programme, project, operation or service implemented is designed to consider issues of Dignity, Access, Participation and Safety. Examples include Gender parity and diverse representation, ensuring local customs are followed, that Services that support marginalised migrants to get education or employment consider the different needs of all identities, people with and without disabilities or anyone wearing a Red Cross or Red Crescent emblem can safely and appropriately respond to and refer a child survivor or violence, exploitation or abuse to the appropriate services.

Racialized people and groups – are people that are categorized or differentiated and marginalised or discriminated against on the basis of their skin colour and or other physical traits.

Safeguarding – for the IFRC Network refers to our responsibility in taking action to: keep people safe from any form of harm caused by the misuse of power by making sure that our staff, volunteers, programmes and communications do no harm to children and adults, nor expose them to abuse or exploitation. Safeguarding also includes protecting staff from harm and inappropriate behaviour such as sexual harassment.³⁷

Safety – Persons of all gender identities, ages, disabilities and backgrounds within affected communities have different needs in relation to their physical and psychological safety. Monitoring the safety of project sites and activities with the direct participation of diverse groups is essential to ensure that the assistance provided meets everyone's needs and concerns in an equitable manner. We should always maximise the positive impacts of sector programmes on people's safety.

Sex – refers to the physical and biological differences, usually between males and females.

Sexual Exploitation - refers to any actual or attempted abuse of a position of vulnerability, differential power or trust for sexual purposes with respect to affected persons, including, but not limited to, profiting monetarily, socially, or politically from the sexual exploitation of another. Any payment (through cash or any other commodity or favour) for sexual services is considered to constitute sexual exploitation.

Sexual abuse – refers to the actual or threatened physical or psychological intrusion of a sexual nature, whether by force or under unequal or coercive conditions when committed against affected persons.

³⁶ This definition elaborates on the IFRC's specific focus of implementing the broad definition of protection for all humanitarian actors adopted by the IASC and accepted by the Movement: "all activities aimed at obtaining full respect for the rights of the individual in accordance with the letter and the spirit of the relevant bodies of law (i.e. human rights law, international humanitarian law and refugee law)".

³⁷ Safeguarding aims to prevent harm in the following areas: i) Sexual abuse and exploitation (SEA) of children and adults by anyone working for IFRC or a member National Society; ii) Other forms of abuse e.g. physical, psychological or emotional, financial and/ or material, discriminatory, organisational abuse and modern slavery of children and adults by anyone working for IFRC or a member National Society; iii) Harm caused by our programmes and communications that we fund through our partners (including other National Societies, the IFRC and ICRC); and iv) Sexual harassment in the workplace.

Sexual exploitation and abuse (SEA) – is used throughout the IFRC policy (2018) to refer to the above-defined acts together.

Sexual and gender-based violence (SGBV) – refers to categories that include, but are not limited to, sexual violence, intimate partner violence, trafficking, forced/early marriage, sexual harassment, forced prostitution, femicide, female genital mutilation, sexual exploitation and abuse, and denial of resources, opportunities and services.

Sexual harassment – refers to any unwelcome sexual advance or unwanted verbal or physical conduct of a sexual nature between Personnel. This is distinct from SEA, which refers to exploitation or abuse of Affected Persons.

Sexual violence – Acts of a sexual nature committed against any person by force, threat of force or coercion. Coercion can be caused by circumstances such as fear of violence, duress, detention, psychological oppression or abuse of power. The force, threat of force or coercion can also be directed against another person. Sexual violence also comprises acts of a sexual nature committed by taking advantage of a coercive environment or a person's incapacity to give genuine consent. It furthermore includes acts of a sexual nature a person is caused to engage in by force, threat of force or coercion against that person or another person or by taking advantage of a coercive environment or the person's incapacity to give genuine consent. Sexual violence encompasses acts such as rape, sexual slavery, forced prostitution, forced pregnancy and forced sterilisation.³⁸

Sexual and gender minorities – refer to persons whose sexual orientation or expression, gender identity or sexual characteristics are different from the presumed majority of the population, which are male or female heterosexuals. The term includes lesbian, gay, bisexual, transgender, intersex and queer (LGBTIQ) people as well as a range of people whose identities or practices are not included within those terms. (Minimum Standards for Protection, Gender and Inclusion in Emergencies – 2018). A closely related term to LGBTIQ is SOGIESC - Sexual Orientation, Gender Identity, Gender Expression, Sex Characteristics, which describes the categories of diversity of which LGBTIQ are specific identities or expressions – and commonly the basis for discrimination

Social Inclusion – describes measures to facilitate access to resources, opportunities and the fulfilment of rights for all by addressing, reducing and ending the systematic exclusion, stigma and discrimination that prevents certain groups from enjoying full participation in economic, social, political and cultural life.

Specialised PGI – refers to dedicated services that aim to directly prevent or respond to violence, discrimination and exclusion and should only be carried out by trained staff and volunteers with necessary resources. These may be integrated or “standalone” activities. For example, setting up and running a DAPS Centres in a displacement camp, or working with specialists and trained volunteers to prevent and respond to SGBV or trafficking in persons (TiP) by providing comprehensive support through case management; coordinated referrals, on-site counselling, legal assistance when needed.

Survivor-centred approach – A survivor-centred approach creates a supportive environment in which the survivor's rights and wishes are respected, their safety is ensured, and they are treated with dignity and respect. This approach is defined by four guiding principles: 1) Safety, 2) Confidentiality, 3) Respect and 4) Non-discrimination.

It is important to recognise that survivors have the right to a range of services as part of a survivor-centred response, but that not all services should be provided (or can realistically be provided) by the Red Cross and Red Crescent. Whilst in some contexts services can be provided, the Red Cross and Red Crescent should ensure a focus on coordination and ensuring access to services provided by other agencies.

Trafficking in Persons means:

- the ‘act’ (what is done), for example the recruitment, transportation, transfer, harbouring or receipt of persons;
- the ‘means’ (how it is done), for example through threat or use of force, coercion, abduction, fraud, deception, abuse of power or vulnerability;
- and the ‘purpose’ of exploitation (why it is done), for example sexual exploitation, forced labour, domestic servitude, slavery or similar practices and the removal of organs.

³⁸ Note: For sexual violence, as defined above, to fall under the scope of application of international humanitarian law, it needs to take place in the context of and be associated with armed conflict. Various technical descriptions are in use globally, including gender-based violence (GBV), violence against women and girls (VAWG) and sexual violence. The term SGBV used here reflects Resolution 3 of the 32nd International Conference of the Red Cross and Red Crescent in 2015. Although the Movement has yet to formalise a common definition of SGBV, this is an IFRC working definition of SGBV that draws on the IASC 2015 Guidelines for Integrating Gender-Based Violence Interventions in Humanitarian Action

When trafficking involves a child, it is irrelevant whether the means, such as force or deception, have been used or not. A child will be recognised as trafficked if they have been moved within a country, or across borders, whether by force or not, for the purpose of exploiting the child. (The international legal definition from *The Protocol to Prevent, Suppress and Punish Trafficking in Persons, especially Women and Children* (commonly referred to as the Palermo- or Trafficking Protocol) – 2000)

Violence – is the use of force or power, either as an action or omission in any setting, threatened, perceived or actual against oneself, another person, a group, a community that either results in or has a high likelihood of resulting in death, physical injury, psychological or emotional harm, mal-development or deprivation.

According to the World Health Organisation (WHO), violence can be viewed under three categories: self-directed, interpersonal and collective. Each category has various types of violence. Cutting across these categories and types are different forms of violence: psychological, physical, sexual and neglect. Categories, types and forms of violence:

Identity-based violence – Any act of violence by individuals, groups or societies based on actual, perceived or ascribed aspects of an individuals' identity such as gender, ethnic origin, nationality or citizenship, age, disability, language, political opinions, religious beliefs, social background, sexual orientation, physical appearance and colour. Identity-based violence is facilitated and exacerbated by structures, norms, and laws that condone or promote (explicitly or tacitly) discriminatory attitudes and practices.

Self-directed violence – refers to violence by an individual against oneself. It is subdivided into suicidal behaviour and self-abuse. Suicidal behaviour includes suicidal thoughts, attempted suicides and completed suicides. Self-abuse covers self-mutilation and substance abuse or misuse.

Interpersonal violence – is violence that occurs between individuals. Interpersonal violence occurs between people who know each other; it can occur in homes, schools, workplaces and institutions. Examples include child abuse, bullying and harassment, family violence, and abuse of the elderly.

Urban violence – is a form of community violence; its very definition is based

on the urban setting where all kinds of violence happen. The violence that occurs behind closed doors of homes directly impacts the violence that happens on public streets; they are intertwined.

Violence is a concern in urban communities around the world, though the risk is heightened where poverty, unregulated small arms availability and alcohol/drugs fuel the violent behaviours. Urban violence can include gang violence, organized crime and interpersonal violence.

Community violence – is a type of interpersonal violence, that takes place at the community level, (e.g. in urban settings) between people who may or may not know one another. Common forms of community violence include gang violence, violence by supporters of sports teams, mob attacks and sporadic crime.

Collective violence – is “the instrumental use of violence by people who identify themselves as members of a group - whether this group is transitory or has a more permanent identity - against another group or set of individuals, in order to achieve political, economic or social objectives.” Examples include genocide, warfare, and terrorism.

Structural violence – is related to “non-physical acts or indirect forms of violence that have emerged from historical experiences and are woven into social, economic and political systems”. Structural violence is “built into the structure of society... and shows up as unequal power and consequentially as unequal life chances”. Self-directed or interpersonal violence can constitute structural violence if they are built into societal systems. Examples include the failure of public systems or other institutions to fulfil their responsibilities without discrimination and violence.

Actions addressing violence

- Prevention means to avoid violence from occurring in the first place
- Mitigation focuses on decreasing further risk of violence and reducing its impact when it does occur
- Response refers to an action or intervention to cope with and handle violence after it has occurred.³⁹

ANNEX 4. SUPPORTING DOCUMENTS LIST

Below you will find a checklist of relevant documents to support your preparation for the Landscape Review. You can put a check mark in each box, if the reference exists, or highlight boxes that are of interest/relevance to your organisation:

Institutional capacity, composition and commitment to address violence, discrimination and exclusion

- Statements or press-releases by the Leadership on PGI
- Briefings or trainings on PGI have been conducted for leadership and senior management, including on diverse management
- There is an identified champion for PGI within leadership
- ToR for senior staff, board members or staff with PGI-related responsibilities
- PGI/Gender and Diversity policy
- Commitments to diverse representation and equal opportunities are defined in the Statutes
- PGI in the NS strategy
- PGI is reflected in annual plans and budgets
- PGI is reflected/mainstreamed in other sectoral policies (e.g., HR, resilience, disaster management)
- PGI is reflected in programme templates and guidelines
- There is budget and funding for PGI activities
- PGI activities are integrated in budgets and donor proposals
- Training on PGI-sensitive budgeting
- Staff or focal point for PGI
- Intra-department working group for PGI
- Persons with PGI skills in the organization
- SADDD⁴⁰ data concerning governing board, senior management, staff, and volunteers
- Job and volunteer advertisements encourage diversity
- Parental leave policy
- Possibility for flexible working hours
- Gender and diversity pay gap audit/assessment
- Contracts/partnership agreements include PGI issues
- Participation in IFRC Learning Forums
- PGI is included in Training plans and materials
- Staff and volunteers' feedback on PGI training

⁴⁰ Sex, age, and disability disaggregated

Institutional protection mechanisms are in place to address violence, discrimination, and exclusion

- Code of conduct
- PSEA policy
- Child safeguarding/protection Policy
- Anti-harassment Policy
- Data protection Policy
- Various disciplinary policies
- Documentation of standard procedures for all personnel to receive/sign PSEA policy
- Integrity Line
- Whistle-blower Policy
- Staff and volunteers understanding of the policies
- ToRs (e.g., senior staff, Board member or staff with PSEA-related responsibilities)
- Contracts/partnership agreements which require contractors to adopt PSEA policies
- Budget and resources for PSEA
- PSEA indicators and monitoring systems
- Reference check document that includes details related to sexual misconduct, child protection
- Recruitment and probation procedures
- Interview HR to confirm procedures
- Training plans and materials
- Training completion/attendance sheets
- Staff feedback on training
- PSEA awareness-raising plan and Communication materials
- Complaint mechanisms
- Description of SEA reporting mechanism
- Case log
- List of service providers and Description of referral process
- Consent forms
- Referral form for survivors of GBV/SEA
- Survey for staff, volunteers, and community members
- Quality and accountability of response: survey for survivors
- PSEA investigation policy and procedures
- Contract with a professional investigative service

Theme 2: A comprehensive Protection, Gender, and Inclusion (PGI) approach is adopted across all programmes, operations and services.

- Use of PGI in Emergencies Toolkit and Guidance
- Assessment templates
- Project Documents, assessment reports
- Sectoral collaboration and mainstreaming
- Disaster Response Emergency Fund (DREF), Emergency Plan of Action (EPoA)
- Mainstreaming training, specialised programmes or training

Theme 3: Advocacy, Diplomacy, Partnership and Learning: Communication material (press releases, speeches, social media posts etc.)

- Case studies, research, reports
- Participation in coordination mechanism/s
- Advocacy and communication policy and strategy
- Joining PGI Channel in Slack
- Participation lists for calls and meetings
- Contracts/partnership agreement/s which include PGI.
- Joint advocacy, awareness, and communication initiatives.
- Engagement with community-based groups

ANNEX 5. PGI – LANDSCAPE REVIEW PRIORITIES

Mark which areas are priorities, based on your reflection of your score and the following IFRC recommendations categories.

For any area rated as <i>2-Partly achieved, 1-Not achieved or 0- Not Applicable or Don't know</i> on the following questions in the PGI Landscape Review, mark each theme and question.:	Priority
<p>Theme 1:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1.1 Leadership commitment to PGI <input type="checkbox"/> 1.2 Policies, Processes, Strategies and Tools – If there is an on-going revision of NS Statues, <input type="checkbox"/> 1.3 Budget allocations related to PGI <input type="checkbox"/> 1.4 PGI Personnel <input type="checkbox"/> 1.5 PGI related Training <input type="checkbox"/> 1.6 Organisational Development <input type="checkbox"/> 1.8 Institutional Protection Mechanism in place <p>Theme 2:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 2.1 Collecting and analysing Sex, Age, Disability Disaggregated Data (SADDD) <input type="checkbox"/> 2.2 PGI analysis <input type="checkbox"/> 2.3. Application of the Minimum Standards for PGI in emergencies used in emergency response <input type="checkbox"/> 2.4. Application of the Minimum Standards for PGI in emergencies in other, non-emergency programmes? 	<p>PRIORITY AREA NUMBER ONE</p>

For any area rated as <i>2-Partly achieved, 1-Not achieved or 0- Not Applicable or Don't know</i> on the following questions in the PGI Landscape Review, mark each theme and question.:	Priority
<p>Theme 1:</p> <p><input type="checkbox"/> 1.2 Policies, Processes, Strategies and Tools – annual planning or NS multi-annual strategy</p> <p><input type="checkbox"/> 1.7 Representation of community members</p> <p>Theme 2:</p> <p><input type="checkbox"/> 2.6 Mainstreaming: Does the organisation provide programmes and services to prevent, respond and mitigate risks of violence, discrimination, or exclusion towards specifically affected groups</p> <p>Theme 3:</p> <p><input type="checkbox"/> 3.2 Learning from past programmes through research, analysis, or evidence-based approaches</p> <p><input type="checkbox"/> 3.3 PGI is identified as area of cooperation in existing partnership agreements with IFRC, ICRC and other NSs</p>	PRIORITY AREAS NUMBER TWO
<p>Theme 2:</p> <p><input type="checkbox"/> 2.5. Mainstreaming: PGI Marker is systematically applied</p> <p><input type="checkbox"/> 2.7 Specialised: Integrate specialised PGI activities in emergencies or long-term programmes</p> <p>Theme 3:</p> <p><input type="checkbox"/> 3.1 Advocacy and Humanitarian Diplomacy to raise awareness about violence, discrimination or exclusion towards specifically-affected groups</p> <p><input type="checkbox"/> 3.4 Participation in national, regional or global PGI Networks Research</p> <p><input type="checkbox"/> 3.5 Partnership with local organisations, such as disabled persons' and women's organisations, as well as international NGOs</p> <p><input type="checkbox"/> 3.6 Participation in national and sub-national PGI coordination forums</p>	PRIORITY AREAS NUMBER THREE

ANNEX 6. PGI - LANDSCAPE REVIEW FINDINGS REPORT

The PGI Landscape Review Findings Report can be organized in a brief document of 1-3 pages as follows:

Background: Briefly explain the purpose and context of conducting the PGI Landscape Review, how, when, and who participated in its completion. Describe in detail the composition of the groups who participated in the completion of the Scorecard: how many men and women, their positions (i.e., staff, volunteers, senior management, etc.) and the areas/sectors where they work (e.g., RFL, DM, human resources, and administration, etc.). Indicate the total score for the Landscape Review and the breakdown of score by theme.

Achievements: List 3-5 areas that rated Achieved or Partly Achieved to illustrate what is already being done. If possible, include graphs, visuals related to your results.

Gaps and future areas of work: Present the most urgent areas for action, listed under high priority and those that may not require a lengthy process of change. For example, "1.5 PGI related Training - is a high priority based on the score it received. There are no trainings available for PGI related areas."

Next Steps: Describe follow-up and proposed lines of action. This includes developing the ToR for the Organisational Assessment. Even if next steps are in draft form pending further consultation and/or guidance by senior management or governing board. If no follow-up was discussed upon completion of the Landscape Review, this section can be marked "pending" to be completed by senior leadership, the governing board, and partners.

ANNEX 7. TERMS OF REFERENCE

The components of the Terms of Reference for completing the full PGI Organisational assessment can be found below. Don't hesitate to contact your IFRC PGI focal point for an example of a completed ToR.

Project background – The background answers two questions: what problem is being addressed? And what has been done to address it?

Project Scope – Describe the scope of the ToR. Does it include implementation of the findings?

Leadership Intent – This section is dedicated to leadership commitment: signaling their ownership, commitment, and involvement in the PGI Organisational Assessment Journey and that they will support the process by committing to fulfilling the recommendations outlined and ensure the appropriate human and financial resources are involved.

Project Objectives – Describe the general objectives of the project.

Methodology – Describe the methods and broad approach applied. Will there be document review? Data collection? Data analysis?

Expertise required – describe the core members of the assessment team and any additional expertise you may need.

Timeline – describe the timeline of the project

Management structure – Describe any partners, that will support or manage the program. It should become clear who will lead the project and what roles and responsibilities they will have. This includes financial management

Roles and responsibilities – clarify the roles and responsibilities of those involved. Include who will be the lead, and the various people in charge of different tasks.

Monitoring and reporting – Explain how the objectives will be achieved and how the project will be managed and evaluated. It should become clear who will lead the project and what roles and responsibilities the various people in charge of tasks such as financial management, monitoring and evaluation will have.

Budget – Provide an overview of the financial inputs needed to achieve the objectives.

Workplan – describe any planned activities to achieve the project objectives.

ANNEX 8. TIMELINE AND COMMUNICATIONS CONSIDERATIONS

<p>Getting Started</p> <p>Identify a member of the Assessment Team who will be responsible for internal communications. They can support the scheduling of interviews, consultations with other technical leads. They are also responsible for developing and agreeing upon a communications plan. This includes keeping all stakeholders informed on the process, keeping staff, volunteers informed of next steps as they arise and even blocks if they occur.</p>	<p>Analysing Data</p> <p>As you analyse your data, the more diverse and broad the assessment team, the better they can find unique insights. This can create credibility in the information you find. This is a key moment for discussion as some of the results may be surprising, or not accepted. be open about this process and if possible host a meeting or open space to discuss the data analysis.</p>	<p>Implementation and Plan of Action</p> <p>As your final plans are in place, or your next steps identified. you will need to ensure there is wide support and buy-in from leadership and other stakeholders. Ensure people are aware of their roles and responsibilities, how they can contribute to the process or report success/challenges, as this helps ensure everyone is part of the collective process.</p>
<p>Adaptions during the Journey</p> <p>The PGI OAT Journey is not a one size fits all solution. Throughout the PGI Assessment Journey, you will need to adapt the tools to fit your context. This is most relevant in the methodology section. Communicate with relevant technical leads, other officers, to get an understanding of what is relevant for the whole organisation.</p>	<p>Developing Recommendations</p> <p>Share an update on the process of developing recommendations. This can even be a workshop that allows for feedback and input of select stakeholders. Even for staff who are not participating in the assessment process. feedback by email, suggestion box, or anonymous survey can make it easier to facilitate open and anonymous communication.</p>	<p>Capturing Learning</p> <p>Be sure to document successes, frustrations throughout the process. Did you find one method of engaging with stakeholders more effective? Did NS leadership respond to a particular tactic? answering some of these questions will help other NS as they beginning their PGI OA Journey.</p>
<p>Data Collection</p> <p>Communicate clearly with all stakeholders on their role in data collection, this includes training some staff in how to collect and use data, or simply informing stakeholders of their rights as participants in data collection. This includes letting stakeholders know why their input is needed or useful.</p>	<p>Presenting Findings</p> <p>There are several tools to help you present and organise your findings – The Landscape Review Report and Organisational Assessment Report. You can host a workshop for each of these reports and create additional tools to help visualise and illustrate your achievements such as a PowerPoint. Remember that as important as it is to show this information to Leadership, it is also a key moment to include all stakeholders. Ensuring all involved know what the recommendations, or next steps mean or what they look like.</p>	

ANNEX 9. KEY DOCUMENTS TO REVIEW

- The Organisation's Constitution/Statutes
- The Organisation's Strategic Plan and Budget
- Policies; for example, the Code of Conduct, PSEA Policy, Child Safeguarding Policy, Disability Inclusion Policy, Social Inclusion Policy, Non-Discrimination in the Workplace Policy, Disaster Risk Management Policy, Anti- Harassment Policy, Human Resources policies, Volunteer Guidelines. etc.
- Strategies; including departmental or thematic strategies
- Plans, which includes emergency response plans (and contingency plans, for example).
- Organigrams
- Budgets and financial reports
- Annual reports
- Partnership agreements
- Vulnerability and Capacity Assessments
- Programme/project documents
- Speeches/statements
- Human Resources: policy and procedures (including rules and regulations on salary, parental or family-related leave, interview questions, etc.)
- Job descriptions
- Vacancy announcements
- Training materials and reports
- Lay-outs of offices or desk charts
- Media and communication materials
- Minutes of meetings with participant lists
- Articles and statements in newspapers or in public hearings that related to the perception or position of the National Society in the community
- Information from systems gathering data about number of users/community members

Document Analysis and Ranking.⁴¹

Documents reviewed can be assessed based on the following criteria;

Document Analysis Score	Gender and Diversity Context
0	No reference is made to gender equality or other diversity factors
1	Some reference is made to gender equality, diversity factors, sex or gender discrimination or data are disaggregated by sex but without analysis.
2	Protection, Gender and Inclusion or diversity related analysis is provided but inequalities are not addressed by the policy, programme, project or activity.
3	Some Protection, Gender and inclusion or diversity related -specific action to address inequalities is planned, implemented or evaluated but not in a comprehensive way.
4	Protection, Gender and Inclusion and diversity related analysis and action is adequately and effectively mainstreamed throughout the policy, programme, project or activity.
5	The reviewed document is exemplary or innovative in the way it addresses a Protection, Gender and Inclusion or other diversity related concerns.

⁴¹ Adapted from the ILO Participatory Gender Audit Desk Review

ANNEX 10. KEY INFORMANT INTERVIEWS

Key Informant Interviews can include:

- People of all gender identities; Female, male, non-binary, other,
- People from traditionally marginalised, racialised, or minority groups, indigenous people, people with migrant or refugee background, people with disabilities (PWD),
- People from different religious, ethnic, linguistic groups,
- People from all levels of the organisation, including Board members, senior leadership, mid-level managers at national headquarters, branch managers, volunteers, administrative and entry-level staff, drivers, etc.,
- Community members from areas where the organisation does not have a presence of branches,
- Partner National Society staff, if available.
- Partners (NGOs, civil society actors, government/ministries, coordination mechanisms, etc.)
- PGI Staff

Develop a list of Key Informants and record their information in a template as shown below:

- Describe your key informants' profile or any other sources.
- General Info
- Role, Organisation, Name (Optional), Age, Sex, Preferred contact info.

Example:

Role	Organisation	Name	Age	Sex	Preferred contact method (email, phone)

ANNEX 11. INTERVIEW QUESTIONS

Here are some guiding questions that you can ask during interviews that correspond to the following themes. Adapt the interview questions to the context of your organization.

Theme 1: Institutional capacity, composition and commitment:

- Do you think gender equality integrated into the Organization's vision, policy and objectives, and, if so, how?
- Is leadership responsive to issues and conversations related to gender and diversity?
- How does leadership respond to conversations happening at the national or international level around PGI issues? (adapt to local context, child marriage, SGBV, disability inclusion, racism and discrimination, LGBTQ+ etc.)
- As far as you are aware, does the National Society have a Protection, Gender, and Inclusion gender and/or diversity and inclusion policy? Strategy? Plan of Action?
- Are gender and diversity issues brought up in management meeting, high level committees, boards or executive committees?
 - » Are there issues that are avoided or 'taboo' to discuss?
- In your opinion, how would you describe gender equality in the organization?
- Are there diverse representatives on the Governing Board? Please describe the composition;
- Can you describe the parental leave arrangements in place (paternal/maternal, including adoption/surrogacy)?
- Are you aware of discriminatory behaviour? (racist/sexist-both overt and covert), inappropriate jokes and microaggressions (both intentional and unintentional jokes) in the organisation? If yes, how was it handled? Or what did you or the management do about it?
- Are there staff or volunteers in the National Society/ Delegation who dedicate their time and work on gender and diversity issues?
- Have you ever received training on Protection, Gender, and Inclusion? Or on diversity? Provide details of when the training took place, duration, and contents.
- Can you describe any training volunteers receive on PGI related issues?
- Volunteer network has a fair gender and diversity balance and is representative of the communities in which they serve
- Are you familiar with PGI mainstreaming tools?
- How are PGI Staff recruited?
- What are some of the barriers for PGI staff?
- Do staff, volunteers, delegates have clearly developed competencies?
- Does the National Society/Delegation have a PGI Focal Point? Are there different focal points for topics related (such as SGBV, Child Protection, Safeguarding)?
- Do you know what to do if a community member reports that a staff-member (including managers) or volunteer has behaved inappropriately- sexually abused or exploited them?
- Do you believe that training, mentoring, and professional development are equally available to people in the organisation? If not, how so?
- As far as you have seen, are men, women, and minority groups represented equally as speakers on panels, debates and events? Please give examples to support your answer.
- Do you feel the organisation is equally open to recruiting and promoting people (staff and volunteers) with disabilities, ethnic minority groups, women, and men?
- What difficulties or risks do people face because they belonging to a specific group or because of their difference? (For Example, access to services, tension, maintain intercommunal relationships)?

Theme 2: Protection, Gender and Inclusion in programmes, operations and services

- Are there efforts to ensure gender equality and diversity within project managers, employees and volunteers?
- How are funds allocated and reported on? Do gender and diversity factors have specific criteria? Are specific gender and diversity objectives formulated?
- What are the modalities for implementing projects: explicit integration of gender equality, separate projects, separate project components, separate budget allocations for women and gender mainstreaming?
- Are efforts made to ensure that all projects include a gender mainstreaming strategy?
- What are the opportunities and limitations of the existing system to capture PGI mainstreaming or efforts related to gender, diversity and inclusion?
-
- Do you translate materials for culturally and linguistically diverse communities and use interpreters?
- Does the organization design and implement standalone programmes for specific groups of people, such as minorities, older people, people with disabilities, etc.?
- Does the organization have a gender equality plan? If so, is it discussed and disseminated and were employees involved in its development?
- How does the organization work with vulnerable communities or community led organizations?
- In the programmes and services that you deliver to communities, do you consider the different needs of men, women, boys, girls, persons with disabilities and older persons? Conduct a PGI analysis?

Theme 3: Advocacy, diplomacy, partnerships and learning

- How does the organization communicate its achievements on gender equality and diversity?
- Can you describe any networks the organization is a part of in related to PGI areas? Are there any criteria for selecting partners based on their commitments to gender and diversity, or approach to safeguarding?
- Can you describe how information/learning from programs or services collected and distributed in a systemic manner? How do partners respond to the organization's approach to gender and diversity?
- Are you aware of any efforts to build partnerships with organization's based on their capacity in safeguarding? Gender and diversity?
- Are you familiar of any efforts by the organization to share learning or conduct diplomacy on any PGI issues?

Other areas:

Some questions may not be directly related to the key PGI Themes but aim to find out how decisions that promote a Protection, Gender and Inclusion approach or diversity inclusive approaches are made, the perception of the success, challenges and opportunities related to PGI, gender and other diversity factors, the organizational culture and other critical areas related to IFRC commitments such as harassment and bullying

- How is PGI seen in the organisation? Has there been changes over time?
- Do you feel safe and comfortable to talk about protection, gender, inclusion, disability, child protection, sexual and gender-based violence (SGBV) and discrimination issues in your workplace and with your managers?
- Is the organization or operational unit seriously involved in promoting the empowerment of women and men and in changing cultural norms in society?
- Who are the people that influence how PGI is integrated into the organization?
- Jokes can be a part of everyday life. Have you heard any jokes that can be offensive? Do they target certain people?

- Do you know how sexual harassment is treated in the organization? Are you aware of the staff who are appointed to handle confidential issues? Are you aware of any complaint procedures in place?
- How does the organization take personal, family, and social obligations of staff into consideration?
- How would you describe the work environment in the Office? Do you think it is perceived to be gender-sensitive and respectful? If yes, how? If no, why not?
- Do you know of any barriers to staff or volunteers advancing in the organization based on their identity? Perceived race, gender, age, ability?

Consider asking additional questions to different managers, staff, and volunteers.

Management and Governance:

- What are the Board and Senior Management Team's (SMT) priorities for PGI?
- What are the main challenges that SMT faces in ensuring more diversity and gender sensitive actions/decisions?
- Have you ever sent information and/or requested for assistance on PGI to headquarters, the IFRC or partner?
- Have you ever involved local NGOs or community-based organisations in your trainings or attended trainings offered by others on diversity, gender and inclusion or PGI issues?
- Do you consider your volunteer base to reflect the diversity in the community? If not, which groups of people are underrepresented?
- What challenges do female staff face in being able to operate effectively in the field? What challenges do male or non-binary staff face?
- Provide some examples of – protection, gender, and inclusion, and gender-sensitive actions in your services.

Volunteers

- Do you consider all training, recruitment, etc. opportunities offered by the National Society to be open to you?

- What do you understand to be the National Society's priorities in relation to Protection, Gender and Inclusion?
- Do you think that the National Society and volunteers respond to the distinct needs of men, women, elderly people, persons with disabilities? Provide examples to support your response.
- Do you know of marginalized groups that the National Society does not support? If so, who are they and what, in your opinion, are the reasons why the National Society does not support them?
- Are you aware of staff and volunteer codes of conducts, and how to report misconduct?
- There are sometimes opportunities when volunteering leads to paid employment. Do you believe that women and men, including people from minority and other diverse groups, have equal opportunity to gain employment? Or do you think that a specific group of volunteers have a higher chance to be hired by the National Society as the result of their volunteer services?
- If a child came to you and reported an abuse, do you know whom to contact in the National Society?

Partners

- How do you coordinate or collaborate with the organisation on programmes or projects?
- What, if anything, do you know of the organisations work on PGI?
- Do the representatives from the organisation raise PGI concerns and issues in meetings?
- Are there opportunities or gaps you believe the organisation could work on to improve its attention to PGI issues?

ANNEX 12. FOCUS GROUP DISCUSSIONS

Where possible, ensure consent from participants, be sure to transcribe the contents of interviews and categorise findings by the same themes. One method would be to conduct thematic analysis using themes aligned with the 3 priority areas in the PGI organisational assessment. Here are some best practice tips and recommendations for conducting FDGs:

- The FGD should not consist of more than 10-12 persons. Higher numbers will make it difficult to get the active participation of everyone.
- Prepare a FGD plan, which includes timelines for engagement, roles and responsibilities, consent forms, and the necessary follow-up actions.
- Start the FGD by explaining to participants why the FGD is taking place and what follow up and feedback can be expected afterwards. Be sure to include an icebreaker or activity to introduce participants to each other and create a safe space
- Discuss and agree on core principles to ensure confidentiality in the FGD and that it is a safe space for all participants. Including getting permission to record the session. Assure participants that they will not be individually identified in the report and that all responses will be anonymised.
- If possible, always conduct sex- and age-segregated FDGs as these capture the inputs from male and female and other identifying persons, from various stages of the life cycle.
- To ensure FDGs are inclusive and accessible to all; consider the needs of persons with disabilities or other groups that face discrimination or who for any other reason may not be able to participate equally in the community meetings without considerations of their dignity and access.
- Where possible, include a group debrief. In the debrief, a nominated person from each group presents back in plenary
- Organise sessions during times of the day and in locations that are suitable and accessible to everyone. This may mean making accommodations for caregivers and ensuring childcare is available.
- It is recommended to record the FDGs and transcribe them verbatim to ensure that crucial information is not missed or misinterpreted.
- If a FGD must be conducted online establish rules for online etiquette, (e.g., speaking one at the time, stating your name and position/function before engaging into the subject matter and encouraging people to turn on their camera at least when taking the floor if the internet connection allows). It is also recommended to have a person as a conference administrator to manage questions and answers, a facilitator, and a transcriber. Recording the audio and video is strongly recommended. Most online tools have accessibility feature such as “closed captioning (CC)”.
- If possible, note any non-verbal responses and interactions in the group.
- Ensure that all information is clear and easy to understand (including for persons who are illiterate, persons with intellectual disabilities, and persons who are linguistically diverse).
- Some people tend to dominate discussions. Take steps to engage the less talkative members of the group, you can use prompts such as ‘Can we hear from someone who has not spoken yet?’
- In some cultures, people may feel more comfortable to speak in a smaller group. Create some smaller groups for various questions. Trained co-facilitators can lead some of the questions and answers and then regroup for further discussion.

It is important to capture divergent opinions within the group. Acknowledge that there are differences of opinion that all are valid and take notes on these areas of difference to ensure they are analysed. You can find more guidance here: [Tool 2.6 PGI in Emergencies Toolkit- PGI Focus Group Discussion Guide](#).

Ethical considerations: Always ensure consent from participants, be sure to transcribe the contents of interviews and categorise findings by the same themes. In FGDs, facilitators should emphasise that participants must not disclose sensitive information to others outside the room. Consideration might be given to signing a confidentiality statement (on a flipchart paper, where everyone signs their name to it) to reinforce this message. Collect only data you will need i.e., be smart when designing questions and think beforehand how much information it is realistic for you to analyse.

Confidentiality: It is important that interviewees and all FGD participants share their views. PGI can be sensitive issues, interviewees and participants must feel comfortable to be able contribute openly. For Facilitators and the PGI Assessment team, this means taking the time necessary before starting each session of interviews/FGDs to reassure participants that interviews/discussions are confidential. Reassurance should also be offered that, while responses, attitudes and perceptions will be reported, they will not be attributed to any one individual. In email communications or stored data and survey results, it must be clear to the participants whether their answers will be anonymous or not. If the information is sensitive but not anonymous, it should not be stored on shared drives or on non-secure online cloud storage like DropBox.

Sensitive topics and questions: Discussions about PGI issues can trigger negative memories of personal experiences. It is important, therefore, that facilitators take all steps necessary to ensure that people in group discussions know that they can step out of the room at any point and/or that they can talk to someone outside of the group discussions (to the facilitator or to the nominated psychosocial support person in the National Society). Some participants may also

feel uncomfortable or shy during particular discussion points. Facilitators must, therefore, create an environment where participants can ask questions and clarify concepts. It is important to leave sufficient time to allow for questions.

Using interpreters: When working with interpreters, it is the facilitator's responsibility to ensure that, prior to the discussion, the interpreters have the same understanding of words such as 'gender', 'inclusion', 'diversity', 'child protection', 'sexual and gender-based violence' and all other related words and that they can interpret these words and concepts into simple, locally acceptable language. It is vital to have a clear understanding between the interpreter and the facilitator's role and distinguish their responsibilities. When working with interpreters, ensure that you speak directly to your audiences as if there were no language barriers. Allow more time as it takes double the time when working via interpreter(s). This should be equally the same regarding the language or sign interpreting sessions (however sign language interpreting is often simultaneous). For accuracy use consecutive interpretation⁴² for FGDs or individual interviews. Pause after 2 or 3 sentences and allow the interpreter to interpret. You may need to have two sign language interpreters if the session is more than 20-30 minutes.⁴³

Referral to SGBV and violence against children service providers: Where discussions do result in someone disclosing experience with violence, exploitation or abuse the assessor/facilitator should act. Firstly, thank the person for their trust in confiding in you, reassure the person that this is a common issue and refer them to a professional agency or local service for help should they wish to have a further conversation with someone. This means that assessors/ facilitators must have the name(s) and phone number(s) of local agency and relevant service providers to hand before beginning the FGDs and have made contact to establish the 'referral pathway'. The facilitator should also have discussed with the Organisations Human Resources' Department how it will address any reported sexual exploitation and abuse perpetrated by a staff member or volunteer against a community member. A survivor-centred approach that is safe, confidential, non-discriminatory, must always be applied.

⁴² the interpreter starts to interpret after the speaker pauses.

⁴³ Whenever possible, seek professional interpreters or bi-lingual and trained language experts. Consider the power dynamic when a community leader is being used as an untrained interpreter. Never resort to children and adolescents for interpretation (this could have a long-lasting irreversible effect on their mental health and the power dynamics in the family/community).

Sample questions for the FGDs with communities include:

- What are the biggest needs for women, men, girls, boys, and non-binary adults and children in your community?
- Are there some groups in the community that have special challenges and needs? Who are these groups and what are their challenges and what are their needs?
- Do you know about the National Society and the services it provides?
- Do those services meet the needs discussed (for men/women/girls and boys, non-binary and for other distinct groups)?
- Provide examples of such services.
- Are there volunteers from the National Society in your community? What work do they do?
- Describe the volunteers in terms of their sex, age, diversity. Consider other characteristics such as disability, ethnicity, and other key factors you think the volunteers portray.
- Have you been consulted about the services that the National Society delivers?
- Are you aware of the obligations of staff and volunteers in the National Society in relation to their conduct towards the community? If so, what are these? How do you think National Society staff and volunteers should behave in the community?
- Do you know who to contact if you have questions or concerns about the National Society's programmes/services?

ANNEX 14. ORGANISATIONAL ASSESSMENT DATA THEMES

Theme/Key heading	Subtheme	Extracted text	Data collection method	Sex	Age	Disability N-None P-Physical I-Intellectual	Length of time in organisation
Theme 1: Institutional capacity, composition and commitment							
Theme 2: Protection, gender and inclusion in programmes, operations and services							
Theme 3: Advocacy, diplomacy, partnerships and learning							

ANNEX 15. ORGANISATIONAL ASSESSMENT REPORT⁴⁴

Executive summary – highlights main points of report including background, methodology and process, and main conclusions and recommendations

Acknowledgements – people or organisations instrumental in promoting, organising, and supporting the assessment

Introduction – purpose of the assessment and report, background to assessment including dates and process, and assessment team

Methodology:

- Summary of Respondents and FGD Participants
- Number and names of departments/offices/branches involved
- Disaggregation of sex, age and other diversity factors of respondents, including role or affiliation such as: managers and staff members, volunteers and community members
- How information was gathered, including types of questions (questionnaires, focus group discussion, Landscape Review, surveys etc. can be attached as annexes)
- Limitations (information gaps, contradictory information, factors contributing to uncertainties in data collection, analysis and conclusions drawn).

Main findings – describe the main findings on the three themes. each section should include data analysis, and comments on the score received under each theme:⁴⁵

- Leadership commitment to PGI: PGI Resources, knowledge and skills, diversity and inclusion, people and diversity management
- PGI in programmes, operations and services: PGI in the programme cycle, activities and services,
- Advocacy Diplomacy partnerships and learning: Internal and external cooperation and partnerships,

Include good practices, and gaps demonstrated by the organisation, including whether these need to be reviewed or whether they can be scaled to other branches or a guide to other NS or organisations.

Conclusions and recommendations – describe the conclusions and recommendations per the themes, subthemes, or capacity areas in the tool.

Annexes & references – any documentation or supporting resources referenced in the document should be included here. Including a list of abbreviations and acronyms. Any steps taken to contextualize the tool.

⁴⁴ Adapted from *Manual for Gender Audit Facilitators – the International Labour Organisation (ILO) participatory Gender Audit methodology*, p. 125 http://www.ilo.org/wcmsp5/groups/public/---dgreports/---gender/documents/publication/wcms_187411.pdf

⁴⁵ Other areas to include or consider are: *Organisational culture, Resources and capacities to integrate diversity and inclusion, Accountability to Communities Community engagement, Integrity and accountability to diversity and inclusion*

ANNEX 16. PARTICIPATORY WORKSHOP GUIDE⁴⁶

This guide will enable you to lead workshops that ensure there is real sharing of power and in decision making for key decision in the assessment process.

1. **Preparation:** What is it you want to achieve? To make it easier for participants to be themselves and share openly, establish and define ground rules.
2. **Purpose and aim:** From your purpose and objective, you define which activities are needed to achieve your objective. What will you do? Using breakout rooms will enable indepth discussions. Define the amount of time needed for each topic, or per activity.
3. **Participants:** Who should participate? The assessment team should determine who the key stakeholders are for each workshop.
4. **What participants should know:** What will participants need to know before hand? What insight will each activity provide you with? How can you make the activity more participatory?
5. **What support do you need:** Understand any restrictions the organisation may have in terms of time, commitment and resources that could impact the recommendations and subsequent PoA.
6. **Reflect and evaluate:** was the workshop successful or do you need to plan additional steps. Did participants contribute the way you intended? Did participants find the workshop useful?

Setting expectations: Each session should begin with an introduction to participants and a form of icebreaker. Ensure participants know why they are there, what the approach of the session is and the intended goals of the session.

Handling conflict: The Facilitator and Assessment Team support participatory processes by balancing the dynamic of the workshop. Visual methods can also be used to manage conflict. Participants can be encouraged to address their arguments to the diagram, rather than directly confronting each other. Conflict can also be embraced and transformed into a positive space for exploration. Good facilitators view the process of sharing and debating ideas (some of which will be perceived as incompatible, or conflicting) as a healthy. Build in regular breaks during the workshop to enable participants to reset. Dedicate space for questions or have a 'question box' to address off topic items.

Reflecting on results developing recommendations: visual group activities help to establish common understanding. Some prompts to support your thinking or activities during reflection exercise can be to use a Picture Tree: writing down some of the prompts in the assessment and correlating score, having breakout groups discuss these findings and returning back to a main group and discussing.

⁴⁶ Reference https://www.open.edu/openlearncreate/pluginfile.php/159529/mod_resource/content/4/TEGN_Workshop.pdf

ANNEX 17. ORGANISATIONAL ASSESSMENT SCORECARD TEMPLATE

(Name of Organisation)- PGI Organisational Assessment Scorecard		
Overall score		_ / 154
Thematic scores		
Institutional capacity, composition and commitment		/ 91
Protection, Gender and Inclusion in programmes, operations and services		/35
Advocacy, diplomacy, partnerships and learning		/28
Score per subtheme		
Leadership's commitment to PGI		/21
PGI resource, knowledge, skills and competencies		/21
Diversity and inclusion		/21
People and diversity management		/28
Protection, Gender, and Inclusion considerations are included throughout the project cycle (planning, implementation, monitoring, evaluation, lessons learnt and reporting)		/21
Protection, Gender, and Inclusion activities and services		/14
Influencing standards, norms, laws, and behaviours, learning		/7
Within-the-movement partnerships and collaboration		/7
Partnerships and collaboration with external actors		/14

ANNEX 18. SETTING ORGANISATIONAL ASSESSMENT RECOMMENDATIONS

Theme		
1. Institutional capacity, composition and commitment	Theme score	/ 91
	Main findings	Recommendations
Sub theme: Leadership's commitment to PGI		
Capacity Area		
Sub theme: PGI resources, knowledge, skills and competencies		
Capacity Area		
Sub theme: Diversity and Inclusion		
Capacity Area		

Sub theme: People and Diversity Management		
Capacity Area		
Theme		
2. Protection, Gender and Inclusion in programmes, operations and services	Theme score	/35
	Main Findings	Recommendations
Sub theme: Protection, Gender, and Inclusion considerations are included throughout the project cycle (planning, implementation, monitoring, evaluation, lessons learnt and reporting)		
Capacity Area		
Sub theme: Protection, Gender, and Inclusion Activities and Services		
Capacity Area		

Sub theme: Within-the-Movement partnerships and collaboration		
Capacity Area		
Theme		
3. Advocacy, diplomacy, partnerships and learning		Theme score /28
	Main Findings	Recommendations
Sub theme: Influencing standards, norms, laws, and behaviours, Learning		
Capacity Area		
Sub theme: Within-the-Movement partnerships and collaboration		
Capacity Area		
Sub theme: Partnerships and collaboration with external actors		
Capacity Area		

ANNEX 19. PLAN OF ACTION OUTLINE

- **Background:** An overview of the assessment process and summary of how the recommendations were reached.
- **Links with National Society strategy and policies:** A description of how the assessment links with the National Society's existing strategies, policies and ongoing processes.
- **Goal and objectives:** Set out the overall goal of the PoA and some key objectives for enhanced gender and diversity integration in the National Society.
- **Scope:** Outline how many offices/branches the PoA covers.
- **Timeline:** Identify the timeline for each of the activities outlined in the PoA.
- **Activity plan:** Establish a detailed plan of activities that includes the following; a description of each activity including how it links with the recommendations and National Society work plan/log-frame; the start and end date of the activity; the location/geographical area where the activity will be carried out; the person responsible for undertaking the activity; the PMER plan, including SMART Criteria; the resources needed and the resources allocated; the activity status; and the final completion date (See template Activity Plan in Annex 2d).
- **Responsibilities:** Identify who will be responsible for the whole PoA and for the coordination of different activities.
- **Resources:** Estimate the costs involved and if the National Society has allocated for this in the plan and budget.
- **Follow up with leadership:** Identify who, and how the National Society's leadership will be updated on developments in the PoA, as well as how they can support in communicating progress within the National Society.
- **Linkages with networks:** Share progress towards the PoA with networks in the region e.g., Regional Gender and Diversity Networks.
- **External partnerships:** Specify whether the PoA will require new collaborations with external partners or involve the strengthening of existing collaborations.

ANNEX 20. SUGGESTED PLAN OF ACTION ACTIVITIES

See the PGI Operational Framework for more guidance.

Goal: IFRC and all member National Societies are safe and inclusive organisations where ensuring dignity, access, participation, and safety for people of all identities is central to all that we do.	
Outcome 1: The Organisation ensures that it has the necessary institutional capacity, composition, and commitment to address violence, discrimination and exclusion	
Outputs	Suggested activities
1.1 Build leaderships capacities in PGI	<ul style="list-style-type: none"> • Organise a briefing/training on PGI for leadership and management, including on diversity management (briefing/training package being developed by IFRC secretariat) • Establish a diverse group of champions amongst leadership to advocate to their peers on PGI • Ensure PGI is embedded in introduction briefings/trainings for NS board/leadership and management
1.2 PGI considerations are embedded in all processes, policies, strategies, and tools.	<ul style="list-style-type: none"> • Include commitments to diverse representation and equal opportunities in the revision of NS Statutes • Include priority to PGI in IFRC and NS Strategies and linked plans and budgets • Embed PGI in existing and new policies, guidance, templates and internal procedures to ensure alignment with this Framework (specify in plan of action which ones)
1.3 Sufficient funding is mobilised to support PGI actions	<ul style="list-style-type: none"> • Make an annual budget for the plan of action • Train and roll-out guidance on PGI sensitive budgeting to ensure PGI is considered in all donor proposals and budgets (guidance is being developed) • Map available and coming calls for funding opportunities for PGI, including for other sectors
1.4 Qualified staff and solid coordination mechanisms are in place to support PGI actions	<ul style="list-style-type: none"> • National Societies establish skilled PGI staff/focal point roles with dedicated responsibility and time • Establish intra-department working groups for PGI with focal point in each department • Ensure there are PGI competency within the national rapid response roster • Develop Working Groups related to PGI activities
1.5 Strengthen the capacity of staff and volunteers to mainstream PGI	<ul style="list-style-type: none"> • Roll out basic-level PGI trainings, and ensure adaption and translation of training material at country level • Assess existing PGI capacity; identify gaps, opportunities and strengths • Consult staff on volunteers on potential areas of interest
1.6 Facilitate organisational development processes	<ul style="list-style-type: none"> • Incorporate findings in plan of action/PGI Organizational Plan of Action and implementation • Undertake organisational reviews in areas of Protection, Gender and Diversity, Inclusion
1.7 Ensure the diversity of the community/ies is represented in the organisation.	<ul style="list-style-type: none"> • Conduct an assessment over potential barriers that exclude different groups from engaging with RCRC • Include commitments to diverse representation and equal opportunities in the revision of NS Statutes

<p>1.8.1 mechanisms, policies and procedures are in place that prevent, mitigate and respond to sexual exploitation and abuse -by humanitarian actors (PSEA), Child Safeguarding violations and sexual harassment or bullying at the workplace, and to ensure whistle-blower protection.</p>	<ul style="list-style-type: none"> • Revise, develop and roll-out policies and procedures that prevent and respond to harassment, abuse, discrimination and bullying with a survivor centred approach • Review existing mechanisms frequently for their effectiveness • Disseminate policies across all levels of the organisation
<p>1.8.2 Leadership signals and follows through on its commitment to safe and inclusive workplace.</p>	<ul style="list-style-type: none"> • Collect and analyse of sex, age and disability disaggregated data over governing board, senior management, staff and volunteers
<p>1.8.3 systems are strengthened to ensure a safe and inclusive workplace, free of discrimination, harassment and abuse.</p>	<ul style="list-style-type: none"> • Review existing policies related to safe and inclusive workplace and revise to ensure equity • Conduct a gender and diversity pay gap audit and address gaps to ensure equal pay for equal work • Develop additional policies where relevant • Consult staff and volunteers for potential areas of new policy or effectiveness of existing policy
<p>1.8.4 Staff and volunteers are familiar with and trained to fulfil the expected standards of behaviour and actions to take i.e., prompt reporting of concerns.</p>	<ul style="list-style-type: none"> • Train project staff incorporating PGI considerations in each of the stages of the project cycle (assessment, design, implementation, monitoring and evaluation)
<p>1.8.5 Safeguarding risks and protection concerns are understood by staff and volunteers. Communities are aware of</p>	<ul style="list-style-type: none"> • Volunteers working in any service provision are trained to recognise signs of violence or distress and know how to refer to more specialised staff within the National Society or other organisation
<p>1.8.6 Referral pathways are strengthened and driven by survivor-centred approaches.</p>	<ul style="list-style-type: none"> • Mapping, testing and monitoring referral pathways and developing standard operating procedures for responding to survivors of violence, exploitation or abuse
<p>1.8.7 The organization is promptly investigates and response to allegations of SEA, child safeguarding allegations and sexual harassment.</p>	<ul style="list-style-type: none"> • Develop and roll-out policies related to addressing PSEA, Child Safeguarding, related Standard Operating Procedures (SOPs) and monitoring tools • Independently review investigation mechanisms and revise according to findings

Outcome 2: National Societies and the IFRC adopt a comprehensive Protection, Gender, and Inclusion approach across all operations, programmes, and services.

<p>2.1 Sex, age, disability disaggregated data (SADDD) is collected, and analysed in all assessments, programmes, and operations.</p>	<ul style="list-style-type: none"> • Ensure a system is in place to Collect and analyse sex-, age and disability disaggregated data (SADDD) in all assessments, programs and operations • Monitor adherence to PGI Minimum Standards in all actions
<p>2.2 Programme design and emergency responses are shaped by PGI analysis and (SADDD), to identify, target, and adapt to the needs of those in at-risk or in vulnerable situations.</p>	<ul style="list-style-type: none"> • Support capacity building activities in analysis and use of SADDD • Review the effectiveness of current systems to incorporate SADDD in identification, targeting and adaptation of programme design
<p>2.3 The Minimum Standards for PGI in emergencies influence the design, implementation and monitoring and evaluation of emergency response.</p>	<ul style="list-style-type: none"> • Adapt and translate Minimum Standards for PGI in emergencies at country level • Monitor adherence to PGI Minimum Standards in all actions • Translate and roll-out PGI Emergency Toolkit • Systematically apply the PGI Marker from the PGIiE
<p>2.4 The Minimum Standards for PGI in emergencies are also applied to post-emergency, recovery, and long-term programmes,</p>	<ul style="list-style-type: none"> • Systematically embed guidance from the PGI Minimum Standards in Emergencies into planning processes. • Request training on the PGI Minimum Standards. • Actively participate in learning and lessons learned related to revising the PGI Minimum Standards
<p>2.5 A PGI Marker⁴⁷ is systematically applied across all programmes.</p>	<ul style="list-style-type: none"> • Ensure a core group of staff understand the tools in the PGI in Emergencies Toolkit • Continuously revise and review the use and application of the PGI marker in the organisation
<p>2.6. Programmes, Operations and Services mainstream the PGI approach and aim to prevent, respond, and mitigate risks of violence, discrimination, or exclusion towards specifically affected groups.⁴⁸</p>	<ul style="list-style-type: none"> • Anyone wearing a Red Cross or Red Crescent emblem can safely and appropriately respond to and refer a survivor of violence, exploitation or abuse to the appropriate services • Training is rolled out to strengthen the ability to collect, interpret and use SADDD
<p>2.7 Capacity is present to conduct specialised PGI activities in emergencies or long-term programmes.⁴⁹</p>	<ul style="list-style-type: none"> • The NS ensures the necessary opportunities for staff to learn how to implement Specialised PGI activities in emergencies through shadowing or mentoring • Develop NS capacities to provide specialized services (such as case management) for survivors of violence, discrimination or exclusion • Develop monitoring mechanisms to track, refer and/or respond to any protection violations identified by volunteers and/or staff • Establishing effective coordination mechanisms between specialised PGI activities

⁴⁷ IFRC's PGI Marker is a tool that assesses to what extent humanitarian action integrates protection, gender (and diversity) and inclusion. For all EPOAs for Appeals and DREFS the systematic application of the PGI Marker from the PGIiE toolkit is recommended, see tool 2.2 in the Toolkit. This can also be adopted for non-emergency projects. If your National Society, due to specific donor requirement etc., use another - similar marker, to assess and track PGI mainstreaming, such as ECHO's Gender and Age Marker or IASC Gender with Age Marker.

⁴⁸ This could include but is not limited to: - Survivors or people at risk of sexual and gender-based violence (SGBV). - Survivors and people at risk of trafficking, - Persons with disabilities. - Children and adults separated from their families (RFL). - Sexual and gender minorities (including SOGIESC/LGBTQI+). - Women and girls. - Racialised people, ethnic and religious minorities.

⁴⁹ Activities may be integrated, or stand-alone services specifically aiming to prevent or respond to violence, discrimination, and exclusion. These are typically carried out by PGI-trained and dedicated staff, volunteers equipped with necessary resources. For example, case management of survivors, specialised services for SGBV and trafficking survivors, prevention, and response of xenophobia, racism, and toxic/fearful masculinities.

Outcome 3. National Societies and the IFRC influence standards, norms, laws and behaviour to reduce violence, discrimination and exclusion, through advocacy, partnerships, and learning within the Movement and externally

<p>3.1 PGI specific advocacy, communication campaigns or humanitarian diplomacy is used to raise awareness on issues of violence, discrimination, or exclusion towards specifically affected groups.</p>	<ul style="list-style-type: none"> • Developing and roll-out a guidance on "how to talk about PGI" including a glossary in collaboration with HD and communications departments • Collecting lessons learned, to inform advocacy and educational tools dignity, access, participation and safety for children in emergencies • Identify entry points and develop national specific strategies on how to mainstream PGI in the NS initiatives on advocacy with governments related to the International Disaster Response Law (IDRL)
<p>3.2 Research on PGI issues, lessons learnt from past programmes, and evidence-based research is used to better understand risks and needs.</p>	<ul style="list-style-type: none"> • Developing structures and systems for collecting, managing and disseminating data and information on PGI • Running the Learn to Change methodology for PGI • Capture and share learnings around National Societies partnership with local organisations, such as DPOs and women's organisation, as well as international NGO to strengthen their work on PGI in order to inspire others and share good practises
<p>3.3 PGI identified as area of cooperation in existing partnership agreements.</p>	<ul style="list-style-type: none"> • Work with external partner agencies includes components of PGI • Where possible, partnership agreements have commitments related to protection, gender & diversity and inclusion
<p>3.4 The organisation actively participates in national, regional, or global PGI-related networks.</p>	<ul style="list-style-type: none"> • Map relevant PGI networks nationally, regionally, and globally • Develop a strategy to engage at the various levels
<p>3.5 Partnerships are used to strengthen PGI specific areas</p>	<ul style="list-style-type: none"> • Strategy is developed to ensure NSs participation in national and sub-national coordination forums • Improved collaboration between IFRC, NS and Disabled Person's organisations through a standard capacity building package, supported by and advisory group of international disability advocates and NS managers
<p>3.6 Dissemination of knowledge occurs in national and sub-national PGI-related coordination forums.</p>	<ul style="list-style-type: none"> • Develop case studies on PGI actions to be presented in coordination forums • Collecting, documenting, and presenting good practice and case studies from the various sectors on PGI in different forums

ANNEX 21. MONITORING AND REVIEWING THE PLAN OF ACTION

Using the example plan of action above. You can complete the table below to highlight the responsible party for implementation, the technical and funding needs for each activity, related criteria for measurement or evaluation, and frequency of review.

Goal: IFRC and all member National Societies are safe and inclusive organisations where ensuring dignity, access, participation, and safety for people of all identities is central to all that we do.					
Outputs	Suggested activities	Responsibility	Technical support and funding needs	Frequency of review	Criteria for Measurement
Outcome 1: The Organisation ensures that it has the necessary institutional capacity, composition, and commitment to address violence, discrimination and exclusion					
1.1 Build leaderships capacities in PGI					
1.2 PGI considerations are embedded in all processes, policies, strategies, and tools.					
1.3 Sufficient funding is mobilised to support PGI actions					
1.4 Qualified staff and solid coordination mechanisms are in place to support PGI actions					
1.5 Strengthen the capacity of staff and volunteers to mainstream PGI					
1.6 Facilitate organisational development processes					

Outcome 1: The Organisation ensures that it has the necessary institutional capacity, composition, and commitment to address violence, discrimination and exclusion					
1.7 Reflect the diversity of the community/ies.					
1.8.1 mechanisms, policies and procedures are in place that prevent, mitigate and respond to sexual exploitation and abuse -by humanitarian actors (PSEA), Child Safeguarding violations and sexual harassment or bullying at the workplace, and to ensure whistle-blower protection.					
1.8.2 Leadership signals and follows through on its commitment to safe and inclusive workplace.					
1.8.3 systems are strengthened to ensure a safe and inclusive workplace, free of discrimination, harassment and abuse.					
1.8.4 Staff and volunteers are familiar with and trained to fulfil the expected standards of behaviour and actions to take i.e., prompt reporting of concerns.					
1.8.5 Safeguarding risks and protection concerns are understood by staff and volunteers. Communities are aware of					
1.8.6 Referral pathways are strengthened and driven by survivor-centred approaches.					
1.8.7 The organization is promptly investigates and response to allegations of SEA, child safeguarding allegations and sexual harassment.					

Outcome 2: National Societies and the IFRC adopt a comprehensive Protection, Gender, and Inclusion approach across all operations, programmes, and services.

<p>2.1 Sex, age, disability disaggregated data (SADDD) is collected, and analysed in all assessments, programmes, and operations.</p>					
<p>2.2 Programme design and emergency responses are shaped by PGI analysis and (SADDD), to identify, target, and adapt to the needs of those in at-risk or in vulnerable situations.</p>					
<p>2.3 The Minimum Standards for PGI in emergencies influence the design, implementation and monitoring and evaluation of emergency response.</p>					
<p>2.4 The Minimum Standards for PGI in emergencies are also applied to post-emergency, recovery, and long-term programmes,</p>					
<p>2.5 A PGI Marker⁵⁰ is systematically applied across all programmes.</p>					
<p>2.6 Programmes, Operations and Services mainstream the PGI approach and aim to prevent, respond, and mitigate risks of violence, discrimination, or exclusion towards specifically affected groups.⁵¹</p>					
<p>2.7 Capacity is present to conduct specialised PGI activities in emergencies or long-term programmes.⁵²</p>					

⁵⁰ IFRC's PGI Marker is a tool that assesses to what extent humanitarian action integrates protection, gender (and diversity) and inclusion. For all EPOAs for Appeals and DREFS the systematic application of the PGI Marker from the PGI toolkit is recommended, [see tool 2.2](#) in the Toolkit. This can also be adopted for non-emergency projects. If your National Society, due to specific donor requirement etc., use another - similar marker, to assess and track PGI mainstreaming, such as [ECHO's Gender and Age Marker](#) or [IASC Gender with Age Marker](#).

⁵¹ This could include but is not limited to: - Survivors or people at risk of sexual and gender-based violence (SGBV). - Survivors and people at risk of trafficking, - Persons with disabilities. - Children and adults separated from their families (RFL). - Sexual and gender minorities (including SOGIESC/LGBTQI+). - Women and girls. - Racialised people, ethnic and religious minorities.

⁵² Activities may be integrated, or stand-alone services specifically aiming to prevent or respond to violence, discrimination, and exclusion. These are typically carried out by PGI-trained and dedicated staff, volunteers

Outcome 3. National Societies and the IFRC influence standards, norms, laws and behaviour to reduce violence, discrimination and exclusion, through advocacy, partnerships, and learning within the Movement and externally					
3.1 PGI specific advocacy, communication campaigns or humanitarian diplomacy is used to raise awareness on issues of violence, discrimination, or exclusion towards specifically affected groups.					
3.2 Research on PGI issues, lessons learnt from past programmes, and evidence-based research is used to better understand risks and needs.					
3.3 PGI identified as area of cooperation in existing partnership agreements.					
3.4 The organisation actively participates in national, regional, or global PGI-related networks.					
3.5 Partnerships are used to strengthen PGI specific areas					
3.6 Dissemination of knowledge occurs in national and sub-national PGI-related coordination forums.					

ANNEX 22. ORGANISATIONAL ASSESSMENT FEEDBACK FORM

Name: (optional)	National Society Branch/ National Society HQ/ IFRC Office/ Delegation:		
Email Address: (Optional)			
How useful did you find the Organizational Assessment Toolkit (OAT) package?	1 Not useful	2 Useful	3 Very useful
How useful did you find the support of your regional or Secretariat focal Points?	1 Not useful	2 Useful	3 Very useful
Did you complete the OAT Progress as part of a certification process, or funding process? Please explain.	Yes	No	If Yes- please explain:
Did you work with any organisations in the IFRC Network to complete the PGI Organizational Assessment? If yes, please describe the nature of the partnership and how you worked together.	Yes	No	If Yes- please explain:
Did you adapt any of the tools, or material in the OAT to your context? if yes, Please describe what steps you took.	Yes	No	If Yes- please explain:
Do you intend to conduct any PGI related assessments in the future? Organisational Assessment, Landscape Review, PGI Operational Assessments, Safeguarding Assessments,	Yes	No	If Yes- please explain:
If you answered yes to the question above, "Do you intend to conduct any PGI related assessments in the future." Please indicate the frequency	Monthly, Annually, Bi-Annually, Per Emergency Response, Other		

Please describe one challenge you had in completing the PGI OAT process:

Open feedback: (please use this opportunity to share any feedback. Where possible, please be specific about section, page number and content you are referring to. Based on your experience, please feel free to suggest changes, edits, and recommendations):

