

Chapter 5: How to use the Gender Audit Checklist

5.1 The Purpose and Design of the Gender Audit Checklist

The Gender Audit Checklist has several uses:

- as a management tool
 - to assess how well the organization meets women's needs
 - to identify priorities for improvement
 - to measure progress towards gender-based targets
- as a community tool
 - to assess how well a local transport provider or local authority meets women's transport needs
 - to identify priorities for campaigning, lobbying and negotiations
 - to measure the progress of operators and local authorities towards gender-based targets.

The Checklist can be used to meet all these purposes, although it has been designed primarily with management in mind. Community groups may have to alter the wording in places, and will find some sections less relevant, or harder to judge (e.g. on improving the gender balance).

The **Checklist** is a series of statements ('items'), not questions, against which the auditors are asked to rate the organization. These statements are our distillation of identified best practice, and the wording is not sacrosanct. Users may well find it helpful to change the tone or emphasis of some of them in order to ensure a better understanding and more helpful replies from respondents. It is divided into four sections:

- Women's travel
- The participation of women in the organization's planning
- Inside the organization: internal organizational issues
- The evaluation of the Gender Audit.

Each section and sub-section is prefaced by a brief account of its scope and the main arguments covered. Further details on this are in the **Literature Search Report** (chapter 3) and the **Focus Group Report** (chapter 4), which taken together anchor the Checklist items to our sources and provide much more background on the arguments and policies involved.

Finally, there is the **Bibliography** (Appendix 1): many of our references were accessed via the Internet, and to find some of them an Adobe Acrobat Reader is needed. This is widely available as a free download from the Internet. The Bibliography is also available on the Gender Audit website on the Internet, at <<http://www.women-and-transport.net/>>.

Below, we set out a suggested auditing process for management.

5.2 An Auditing Process for Management

5.2.1 Committing the Organization

It is a commonplace of best management practice that change will not work if the most senior management is not committed to achieving it. The scope of what may be required may well not be apparent until some way down the road, but from the beginning it will be necessary for the Chief Executive Officer or equivalent to support this programme like any other change-management programme—to will the means and 'walk the talk'. Not only will a lack of support translate at some point into a lack of resources, but the lack of enthusiasm will convey itself to the whole team, strengthening those who oppose, or are simply indifferent to, the move, and weakening those who are trying to help the organization to do better in identifying and meeting women's transport needs.

Commitment can simply mean a letter or speech from the person at the top, although more than this is usually valuable. What commitment fundamentally requires is that the programme is integrated with the organization's strategic approach to all its policies and operations. Thus the implications of undertaking a Gender Audit in good faith have to be carefully thought through, bearing in mind not only resourcing issues and the impact on other programmes, but also the expectations that such a programme will arouse in the community the organization serves and among its own staff.¹

It might be argued that the rational course would be to conduct the preliminary audit (stage one below) *before* committing the organization to the required changes. We would argue that (a) women are by far the largest market-segment in transport and an organization which wants to be successful cannot afford to neglect them; (b) women are such an important client-group that a transport organization which wishes to meet its obligations to the community and be well-regarded within it will commit to improving its provision for women, and (c) simply undertaking the Audit will arouse expectations which it would be wise to try to meet.

5.2.2 Stage One: Appraising the Current Position

Having ensured a continuing commitment to the aims of the Gender Audit, the organization should begin by preparing and conducting a straightforward audit of itself against the Checklist items. The following process might be typical:

- nominate a senior manager to be responsible for the Audit
- plan the audit process, including its goals, measures and targets
- train the auditors and those who will need to understand the Gender Audit's output
- carry the Audit out with several groups:
 - senior management
 - middle management

¹ For examples of the importance of commitment to the success of change programmes, see the Business Excellence Model developed by the European Foundation for Quality Management and the British Quality Foundation, under the Enabler Criterion 'Leadership', or the key principles of Investing in People (Investors in People UK); or the 14th of 'Deming's 14 points for management'. For the specific importance in this context, see, for example, the Council of Europe, *Gender mainstreaming: Conceptual framework, methodology and presentation of good practices: Final Report of Activities of the Group of Specialists on Mainstreaming* (EG-S-MS (98) 2), Strasbourg, May 1998.

- ground-level staff (including those not involved directly with passengers)
- passengers
- the community at large.

Not all the criteria will be relevant to all levels, but all of them will be relevant at at least one level. At the same time, in the interests of making a swift start, an organization might wish to begin by concentrating on one particular area. However, we stress that the rest of the Checklist must not be forgotten. One of the clearest messages from our research is the need for a holistic approach to gender issues.

5.2.3 Stage Two: Planning for Improvement

The results of the Audit have next to be transformed into strategies, policies and plans, and properly communicated:

- results are analyzed and presented to senior management, with recommendations for action
- senior management decides on strategic approach and priorities
- goals, measures and targets are agreed, and responsibilities and reporting lines are clearly allocated, including regular reports to the senior team
- training needs, programmes and resources are identified and planned
- senior management's response is relayed in suitable formats to staff, women's community groups and the media.

5.2.4 Stage Three: Monitoring and Evaluation

Monitoring and evaluation are often confused, but they are quite distinct management activities: monitoring is about tracking the agreed measures and targets, while evaluation is about assessing whether the policies have produced what was wanted in the first place. It is possible to meet all the agreed targets and not to achieve what one set out to achieve, especially where the targets have been badly thought out or insufficiently ambitious; it is also possible, if less likely, to achieve one's goals without meeting any targets, through sheer good luck. Careful planning should ensure that measures and targets are well calibrated with goals, so that initially monitoring should have priority. Towards the end of a programme, the organization should begin evaluating results: basic to this will be a second Gender Audit:

- regular monitoring reports on measures and targets
- development of an evaluation process, including close liaison with passengers.

5.2.5 Stage Four: Renewal of Commitment and Appraising the New Position

This stage takes management back to the start of the previous process. The first phase may have taken between six and 24 months, depending on its scope. Especially if it has been a couple of years between Audits, there may have been profound local changes in, for example, women's employment patterns, attitudes to environmental issues or women's access to cars. Ideally the processes put into place after the first Audit should have picked up such shifts, but if not, the Gender Audit will help here too:

- conduct a second Gender Audit
- report the overall results of the programme to the same audiences as before
- reaffirm senior-team commitment to meeting women's transport needs
- begin planning for the fresh phase.

5.3 Note on Marking

Each section of the Checklist is prefaced by brief explanatory notes. Auditors, and those responsible for these policies overall, may find it helpful also to read the Literature Search and Focus Group Reports (chapters 3 and 4), which outlines the sources and generally sets the context of the arguments.

Auditors are invited to tick the relevant box to the left of each statement. The boxes are labelled **A, B, C, D** and **E** at the start of each section, and the key (below) is repeated at the top of every page of the Checklist.

- A = definitely yes; high level of compliance
- B = evidence not clear either way; moderately acceptable level of compliance
- C = definitely no; very low level of compliance
- D = don't know
- E = not applicable

For example, the answer to **101** (“The organization has investigated its provision for women within the last ten years”) could be either:

- **A** *yes*
- **B** *not really*—e.g. a general passenger survey was analyzed by gender as well as by other factors
- **C** *no*
- **D** *don't know*—probably often applicable where the respondent is an actual or potential passenger, or a member of non-management staff
- **E** *not applicable*—e.g. the organization does not provide public transport services

Where the statement has two or more parts, all parts must be correct for the response to be ‘yes’. We have tried to keep the statements simple, but these are often complex matters. The bus may be clean by the operators’ standards, but if it smells bad, then passengers will assume it is dirty—and both aspects of the matter are important.

Auditors should also give evidence to support each answer given. Evidence could include the results of surveys and inspections, and minutes of meetings.