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Appendix

Analytical Tools and Guidelines for Conducting a Gender Impact Analysis

The purpose of these tools is to provide a guide to carrying out a gender impact analysis of government policies, plans, programmes and projects in the formal and non-formal educational sector. The information can be used in the formulation of and/or making changes in policies and plans, in the planning of interventions, and in the evaluation of programmes and projects designed to reduce the gender gaps identified.

These guidelines identify certain key indicators pertaining to gender analysis of the education sector, and they constitute an attempt to capture and summarise data on these indicators of gender equity.

To guide the process, a series of key questions have been posed. Care should be taken to provide the relevant data to allow for a comprehensive analysis of each indicator. Different indicators will be more relevant to different tasks, e.g. an analysis of a policy document would focus on the section entitled The Policy Environment, while a curriculum project would focus on the relevant portions of the section entitled Critical Policy Indicators. These are generic tools, and it is fully recognised that the cultural specifics of different regions may yield other factors which are important indicators of gender equity and which are not represented in this instrument. Data on these should also be collected, recorded, and analysed.

Responses to the questions posed in the instruments will yield the data necessary for analysis of the gender impact of policies, plans, programmes and projects. These and other issues which may have surfaced during the data gathering, as well as those which may be particularly relevant to the cultural environment, must be assessed in terms of their actual and/or potential impact on gender equity. The analysis must both diagnose and prescribe. It must:

- 1 identify gender gaps where these exist;
- 2 proffer reasons for, as well as identify the implications of these gaps;
- 3 recommend key actions that could be taken to ensure the progressive, and in some cases, immediate closure of the gaps.

The guidelines and instruments can be used as one-time assessment tools, or they can be used to provide baseline information prior to planning an intervention project or programme. Use of the tools at the end of the programme or project will allow for a pre/post intervention comparison, and an evaluation of its impact.

The Policy Environment

Clarity and suitability of the policy statement with regard to gender

- 1 Is there an education sector policy? Yes No
- 2 Is there any policy related to gender in this sector? Yes No
- 3 Is this gender policy stated or unstated? Stated Unstated
- 4 If the gender policy is stated, indicate, circling the appropriate number, the extent to which each of the following describes the statement:

clear	5	4	3	2	1
effective	5	4	3	2	1
unclear	5	4	3	2	1
faulty e.g. prescribes home economics for girls and woodwork for boys	5	4	3	2	1
implemented	5	4	3	2	1

5= to a very great extent; 4= to a great extent; 3= to some extent; 2= to a minimal extent; 1= not at all.

- 5 To what extent is the stated policy an effective tool in terms of guiding the goals, plans and activities at all levels of the educational system as they relate to gender?

Level	5	4	3	2	1
Primary					
Secondary					
Tertiary					

5= to a very great extent; 4= to a great extent; 3= to some extent; 2= to a minimal extent; 1= not at all.

6 Which of the following critical indicators of gender equity does the policy address?

Indicators	Mentioned and addressed in detail	Mentioned and addressed, but not in any detail	Mentioned but not addressed	Neither mentioned nor addressed
Primary				
Provision				
Access				
Participation				
Resources				
Achievement				
Secondary				
Provision				
Access				
Participation				
Resources				
Achievement				
Tertiary				
Provision				
Access				
Participation				
Resources				
Achievement				

7 Is the policy stated for a specific time period or is its life indefinite?

Specific time period Length of period

No time period specified

8 How effective are the mechanisms for (a) implementing (b) reviewing and (c) changing the policy when necessary?

(Is there, for example, an Implementation Committee which has the responsibility of translating policy directions into working objectives and devising programmes to ensure the achievement of these objectives? Is there a Review Board, Academic and/or Research institutions which collect data, and make periodic assessments and recommendations? Is there an Advisory Body which can use the information from the Review Board to consult with policy-makers, academic institutions and research institutes when changes in policy are necessary?)

Mechanisms	VE	E	NTE	NE
Implementing the policy				
Reviewing the policy				
Changing the policy				

VE = Very effective; E = Effective; NTE = Not too effective; NE = Not at all effective

9 What are the problems presented by the gender aspects of the policy?

10 What are the barriers to the full implementation of the gender aspects of the policy as stated?

Nature of Management/Decision-Making

11 What is the gender composition of the Ministry of Education staff?

	No. of Women	Percentage of Total	No. of Men	Percentage of Total
Minister of Education				
Parliamentary Secretary (-ies)				
Permanent Secretary				
Chief Education Officer				
Senior management (please list sub-groups)				
Middle management (please list sub-groups)				
Clerical/secretarial				
Ancillary staff				
Other; please state and indicate gender makeup				

12 What is the gender composition of School Boards?

Posts	No. of Men	Percentage of Total	No. of Women	Percentage of Total
Primary				
Chairpersons				
Deputy Chairpersons				
Secretaries				
Treasurers				
Members				
Secondary				
Chairpersons				
Deputy Chairpersons				
Secretaries				
Treasurers				
Members				

13 Draw diagrams to indicate the reporting relationships

- at the Ministry of Education
- between the Ministry of Education, the School Boards and the School Principal
- between the School Principal and the Staff

For each post on the diagram, write in M or F to indicate whether the person in the post is male or female.

14 What is the male/female representation in decision-making at the Ministry of Education? on School Boards? in tertiary level institutions?

	No. of Men	No. of Women
Ministry of Education		
Primary School Boards		
Secondary School Boards		
Tertiary level Institutions (list separately if necessary)		

15 Does a Code of Regulations exist to guide the management and operations of schools?

Yes No

To what extent does this Code reflect the gender policy of the Ministry of Education?

To a very great extent ; to a great extent ; to some extent ; minimally ; not at all

16 What are the male/female differentials in salaries and benefits; at different age levels?

Age Levels	Male Salaries & Benefits		Female Salaries & Benefits	
	<i>Average Salary</i>	<i>Benefits (list separately if necessary)</i>	<i>Average Salary</i>	<i>Benefits (list separately if necessary)</i>
Under 25 years				
25 to 34 years				
35 to 44 years				
45 to 54 years				
55 years and over				

17 What are the male/female differentials in appointments at Education Officer, Senior Education Officer, Chief Education Officer, at different age levels?

Age Levels	Education Officer				Assistant Chief Education Officer			
	No. of Women	Percentage	No. of Men	Percentage	No. of Women	Percentage	No. of Men	Percentage
< 25								
25-34								
35-44								
44-54								
>55								
	Senior Education Officer				Chief Education Officer			
	No. of Women	Percentage	No. of Men	Percentage	No. of Women	Percentage	No. of Men	Percentage
< 25								
25-34								
35-44								
44-54								
>55								

18 What formal mechanisms exist to challenge the management, e.g. trade unions?

19 What informal mechanisms are used to challenge management, e.g. demonstrations, lobby, petitions etc.?

How frequently are such methods employed ?times per year on average;

Persons involved : staff ; students ; parents ; other, please specify

Is gender a priority issue in any of these challenges? Yes No

20 How much effective autonomy can individual institutions exercise?

21 Who recruits, rewards, disciplines and manages staff?

	Ministry of Education	School Board	Principal/ Vice Principal	Head of Department
Primary				
Recruits				
Rewards				
Disciplines				
Manages				
Secondary				
Recruits				
Rewards				
Disciplines				
Manages				

22 What are the male/female differentials in appointments at Senior Teacher/Head of Department/Vice Principal/Principal level, at different age levels?

Age Levels	Principal				Vice Principal			
	No. of Women	Percentage	No. of Men	Percentage	No. of Women	Percentage	No. of Men	Percentage
Primary level								
< 25								
25-34								
35-44								
44-54								
>55								
Secondary level								
< 25								
25-34								
35-44								
44-54								
>55								
	Senior Teacher				Head of Department			
	No. of Women	Percentage	No. of Men	Percentage	No. of Women	Percentage	No. of Men	Percentage
Primary level								
< 25								
25-34								
35-44								
44-54								
>55								
Secondary level								
< 25								
25-34								
35-44								
44-54								
>55								

23 Does a system of mentoring and succession sequence planning exist?

Primary level schools

all most some few none

Secondary level schools

all most some few none

Tertiary level institutions

all most some few none

all = 100%; most = 65% to 99%; some = 35% to 64%; few = 1% to 34%; none = 0%.

24 Where such programmes exist to what extent are they gender-sensitive?

To a very great extent ; to a great extent ; to some extent ;
minimally ; not at all .

Please explain and/or give examples:

25 What problems does the level of autonomy allowed each institution create in terms of monitoring gender policy?

The Institutional Environment

Level of institution – primary secondary tertiary

Representation in decision-making

- 1 What is the gender composition of the management team/School Board?

Posts	No. of Women	Percentage of Total	No. of Men	Percentage of Total
Chairperson				
Deputy Chairperson				
Secretary				
Treasurer				
Members				

- 2 What is the male/female institutional representation on the management team or School Board?

	No. of Women	Percentage of Total	No. of Men	Percentage of Total
Staff numbers in the institution				
Student numbers in the institution				
Staff representation on the Board				
Student representation on the Board				

- 3 What proportion of men and women are represented in the academic teaching cadre, in the administrative/secretarial staff, and in the ancillary staff?

Posts	No. of Women	Percentage of Total	No. of Men	Percentage of Total
Principal				
Vice Principal				
Heads of Department				
Senior Teachers				
Teachers				
Administrative staff				
Secretarial and clerical staff				
Ancillary staff				

- 4 What are the highest qualifications of the women and men on the academic/teaching staff?

Qualifications	No. of Women	Percentage of Total	No. of Men	Percentage of Total
Doctoral degree				
Master's degree				
Bachelor's degree				
Teacher training/other specialist training				
School leaving qualifications e.g. A-levels				
Other: please indicate				

Working conditions

- 5 What are the problems faced in attracting:
(a) qualified women to work in the institution?

- (b) qualified men to work in the institution?

What are the problems faced in retaining:

- (c) qualified women in the institution?

- (d) qualified men in the institution?

- 6 What constraints and problems do:

- (a) men face in the institution?

- (b) women face in the institution?

Sexual harassment

7 Does a Sexual Harassment Policy exist? Yes No

8 If yes, does the Policy address the following issues?

	Yes	No
Harassment which may occur within the learning environment between male and female students		
Strategies for dealing with sexual harassment at the institutional level		
Strategies for dealing with sexual harassment at the Ministry of Education level		

9 Over the past year, how many instances of sexual harassment has the institution been aware of?

How many of these have been reported?

How many of these have been:

(a) female complaints of male harassment?

(b) female complaints of female harassment?

(c) male complaints of female harassment?

(d) male complaints of male harassment?

10 How are complaints of sexual harassment dealt with?

Internal and external perceptions

11 To what extent do persons working in the institution perceive it to be gender-fair?

(All staff, or a representative sample of staff of the institution should be asked to respond to the following two items on a brief questionnaire, and their responses should be collated and analysed.)

11.1 The following items have three possible responses: W = women mainly; M = men mainly; E = women and men equally. Tick the response which best reflects your views on the particular item.

For whom does your institution provide the following:

(a) education and training opportunities	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(b) recognition for good work	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(c) promotional opportunities	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(d) participation in decision-making	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(e) freedom to use one's own initiative	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(f) up-to-date technology	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(g) opportunities to exercise leadership in one's workgroup	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(h) opportunities to exercise leadership within the institution	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(i) authority over resources	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(j) on-the- job challenges for which one has responsibility	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(k) opportunities for mentoring	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(l) career development	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>
(m) support staff	W <input type="checkbox"/>	M <input type="checkbox"/>	E <input type="checkbox"/>

11.2 The following pairs of adjectives describe extreme views. Five points have been inserted between these extremes. Assess your institution in terms of its attitude to women and men using these adjective pairs and the five intervening points as a continuum. Circle the number which indicates your opinion of where you think your organisation would fall on this continuum, in terms of its attitude to women and men.

Attitudes to women

Empowering	1	2	3	4	5	Hostile
Nurturing	1	2	3	4	5	Exploitative
Respectful	1	2	3	4	5	Disrespectful
Confidence-building	1	2	3	4	5	Repressive
Progressive	1	2	3	4	5	Conservative
Encouraging team-building	1	2	3	4	5	Fostering competitiveness
Friendly	1	2	3	4	5	Unfriendly

Attitudes to men

Empowering	1	2	3	4	5	Hostile
Nurturing	1	2	3	4	5	Exploitative
Respectful	1	2	3	4	5	Disrespectful
Confidence-building	1	2	3	4	5	Repressive
Progressive	1	2	3	4	5	Conservative
Encouraging team-building	1	2	3	4	5	Fostering competitiveness
Friendly	1	2	3	4	5	Unfriendly

12 To what extent do persons external to the institution perceive it to be gender-fair?

(Representatives of the Parent-Teachers Association, Past Students' Association, as well as members of the community should be assembled in focus groups and the previous two items used as discussion points. The responses and opinions expressed should be recorded and analysed.)

Critical Policy Indicators

Nature of the educational provision

Provision made for school places at primary, secondary and tertiary levels

Level	Number of Available Places		
	Female Students	Male Students	Total
Primary			
Secondary			
Tertiary			

1 Where there are differences related to gender, how is the difference justified?

2 (a) Are there schools which cater to female students exclusively? Yes No

If yes, how many and at what levels?

Primary; secondary; tertiary.....

(b) Are there schools which cater to male students exclusively? Yes No

If yes, how many and at what levels?

Primary; secondary; tertiary.....

Access and participation

3 What are the criteria for entry to school at:

Primary level?

Secondary level?

4 Do more girls or boys satisfy the criteria for entry at primary level? Girls Boys

Do more girls or boys satisfy the criteria for entry at secondary level? Girls Boys

What percentage of those who satisfy the criteria are actually accepted for entry?
(The data relating to this question should be provided for different types of secondary schools and different faculties/departments of universities and other tertiary level institutions.)

Level	No. Satisfying Criteria		No. Accepted for Entry	
	Female	Male	Female	Male
Primary				
Secondary				
Tertiary				

5 Describe any mechanism(s) which exist to ensure that equal numbers of girls and boys attend at:

Primary level

Secondary level

6 Is there compulsory education for girls? Yes No

At what level(s)? Primary Secondary

Is there compulsory education for boys? Yes No

At what level(s)? Primary Secondary

How is compulsory education monitored and ensured?

7 What are the enrolment figures for female and male students in primary and secondary education? (Give the year in which the data were collected and if there are different types of secondary schools, identify these and give the enrolment figures for each.)

Level	Enrolment (Year of Survey.....)		
	Female Students	Male Students	Total
Primary			
Secondary			

8 What are the attendance figures for female and male students in primary and secondary education? (Give the year in which the data were collected and if there are different types of secondary schools, identify these and give the attendance figures for each.)

Level	Attendance (Year of Survey.....)		
	Female Students	Male Students	Total
Primary			
Secondary			

9 What are the normal criteria for entry to tertiary level education?

Identify ways in which entry requirements/qualifications may discriminate against male or female students. (If, for example, technical drawing is a requirement for doing architecture, yet this is not taught in girls' schools).

- 10 What are the enrolment figures for male and female students in tertiary level education? (If there are different types of tertiary level institutions, identify these and give the enrolment figures for each.)

Tertiary Level Institutions	Enrolment		
	Female Students	Male Students	Total

- 11 Describe any different provisions made for male/female students which would facilitate one over the other (e.g. the provision of boarding facilities for either male or female students exclusively could facilitate the participation of that group).

Primary level

Secondary level

Tertiary level

- 12 Describe any cultural practices which interfere with the access, and/or participation of female or male students in the educational process.

(a) Cultural practices affecting female participation:

at primary level

at secondary level

at tertiary level

(b) Cultural practices affecting male participation:

at primary level

at secondary level

at tertiary level

13 Who was involved in formulating the curriculum:

at primary level?

at secondary level?

14 To what extent do the aims and content of the curriculum reflect gender biases? Do textbooks and other teaching materials portray traditional female/male stereotypes? *(Detailed analyses of the curriculum content, principal texts and other teaching materials should be conducted to assess levels of gender bias and stereotyping.)*

15 What are the levels of female/male participation in subjects/courses/programmes at secondary and tertiary levels?

Subject/Course/Programme Areas	Student Participation	
	Female Students	Male Students
Secondary		
English literature		
Mathematics		
History		
Physics		
Chemistry		
Biology		
Accounts		
Foreign language		
Tertiary		
Medicine		
Law		
Education		
Engineering		
Computer science		
Humanities		
Management		

16 Is there a state or a school policy which makes specific reference to subject offerings for female/male students? *(Give details.)*

17 To what extent is there a relationship between subjects being pursued by larger numbers of female students and larger numbers of male students and:

(a) the gender division of labour?

(b) occupational gender stereotyping?

(Information on item 17, the learning environment indicator, will need to be collected during classroom observations in different type schools.)

18 To what extent do teachers make an effort:

(a) to provide equal attention to female and male students?

(b) to avoid sexist and discriminatory comments, examples and behaviour in their classrooms?

(c) to use a variety of teaching styles? *(Do they concentrate on styles which are more suited to the learning styles of either male or female students?)*

19 List co-curricular activities which exist for female and male students

Co-Curricular Activities	Participation	
	Female Students	Male Students
Primary		
Secondary		

20 List all gender exclusive co-curricular activities e.g. sports, clubs, societies

Gender Exclusive Co-Curricular Activities	
Female Students Only	Male Students Only
Primary	Primary
Secondary	Secondary

21 What is the female/male composition of the management and membership of student-run clubs or societies?

Student-Run Clubs/Societies	Management		Membership	
	Female	Male	Female	Male
Secondary				
Tertiary				

22 Are there policies governing the mechanism for student promotion: from primary to secondary; from secondary to tertiary; as well as within the primary and secondary systems?

Primary to secondary promotion:

Mechanism:

Does this mechanism discriminate in any way against girls? (*explain*)

boys? (*explain*)

Secondary to tertiary promotion:

Mechanism:

Does this mechanism discriminate in any way against:

women? (*explain*)

men? (*explain*)

23 What are the dropout rates at primary, secondary and tertiary levels of female/male students? *(Different types of secondary schools may have different dropout rates and these should be calculated separately. Different programmes at tertiary level will be of different duration, so dropout will have to be calculated for each independently.)*

Level	Entry Enrolment of Cohort (Year.....)		Graduation Enrolment of Cohort (Year.....)		Dropout Rate	
	Female	Male	Female	Male	Female	Male
Primary						
Secondary						
Tertiary						

24 What are the possible factors accounting for gender differentials in dropout rates?

Level	Factors Affecting Female Dropout	Factors Affecting Male Dropout
Primary		
Secondary		
Tertiary		

25 What is the female/male graduation rate from secondary school? *(Record the completion rates of girls and boys for different types of secondary schools, for at least three years.)*

Secondary School Type	No. of Graduates Year 1		No. of Graduates Year 2		No. of Graduates Year 3	
	Female	Male	Female	Male	Female	Male
School type 1						
School type 2						
School type 3 etc.						

Resources

26 To what extent do teacher education programmes include components which create an awareness of gender issues and concerns? *(Supply a list of relevant courses, and indicate the years in which they were first taught. The level of importance attached to the issues should be carried out through (a) an analysis of these courses, and (b) interviews with teachers.)*

Have any in-service or staff development workshops addressed these issues with practising teachers? *(Supply a list of such courses together with the numbers of female and male teachers attending.)*

27 What is the nature of the financial support provided for institutions at primary, secondary, tertiary levels?

Average cost in US\$ (Year.....)	Primary		Secondary		Tertiary	
	Female	Male	Female	Male	Female	Male
Government provision						
Parent/Family provision						
Private support funds						
Institution fundraising						

28 What are the criteria used for the assignment and distribution of resources: at Ministry level?

at institutional level ?

at primary level?

at secondary level?

at tertiary level?

- 29 Does the mechanism in place present problems for monitoring gender policy?
(Give details)

Achievement impact

- 30 Female/male literacy rates : Female%; Male%.
- 31 Female/male differentials in terms of entry for and success in achievement tests at primary, secondary and tertiary levels. *(All examination data should be analysed. The tables below provide a sample of how the data could be recorded. In all instances the year for which the results have been obtained should be noted. It is often useful to compare the results over a five or ten year period to identify trends.)*

Primary level achievement tests

Year	Entries			% Passes		
	Female	Male	Total	Female	Male	Total

Secondary Level	Examination Data (Year)					
Subjects	Female		Male		Total	
	Entry	Passes	Entry	Passes	Entry	Passes

Tertiary Level	Examination Data (Year)					
Subjects	Female		Male		Total	
	Entry	Passes	Entry	Passes	Entry	Passes

(The data should be analysed to answer the following questions: Is female/male achievement at secondary and tertiary levels similar in specific subject areas and in specific courses and programmes? What is the relationship of the subjects, courses, programmes pursued, and qualifications gained, to the division of labour along gender lines to jobs available and to remuneration granted?)

- 32 To what extent are there female/male differences in the development of social attitudes and values?

(Students who are about to graduate could be involved in focus group discussions or asked to write essays which seek to elicit their knowledge and understanding of broad socio-economic-political-cultural aspects of society, and to determine their commitment to changing inequitable yet traditionally inscribed female/male roles. School and other records or a self report questionnaire could be used to document involvement in the leadership of their educational institutions as well as in community settings. Skills such as articulateness in public/formal settings could be assessed through debating competitions, and/or public speaking competitions. Assessment of the data emerging from these activities should be analysed on a gender basis.)

- 33 How readily do graduates find employment? Are female/male graduates with similar qualifications employed at similar levels, with similar salaries and benefits? *(Tracer studies are needed to provide these data. Such studies may be done by schools, colleges and universities as part of their normal record-keeping, while in other situations, no such records may be available. Sampling secondary school and university graduates from specific years and exploring these issues should provide usable data.)*