



Instructor's Guide

Short course 3: *Gender Equality and Social Inclusion (GESI) for Climate Finance*

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Overview

This instructor's guide introduces the course, including the context, importance and objectives of the course. It also explains how the course modules have been structured, how these modules contribute to the overall objectives of the course as well as how the instructor can use material for this course in delivering it to government officials and other experts on climate adaptation finance. Overall, this guide offers trainers direction on how the course should be implemented and serves as an introduction to the course for prospective participants.



Why this course?

The *Gender Equality and Social Inclusion (GESI) for Climate Finance* course provides participants with capacity to develop GESI-sensitive concept notes and proposals for climate finance. The course is designed to provide a foundation for understanding the importance of participation and inclusion of the local people in projects by gender and other intersectionality categories. The aim of the course is to equip learners with the necessary knowledge, skills and values to practise sound gender mainstreaming and social inclusivity in development of projects for climate financing in their organisations, thereby empowering concerned sectors. In addition, the course discusses the connection between GESI and climate adaptation finance, as well as the consideration of GESI in existing climate funds to allow for understanding of important barriers and enablers for inclusivity in climate adaptation finance projects. Understanding Gender Equality and Social Inclusion (GESI) helps pinpoint and address particular vulnerabilities in climate finance strategies.

What will be achieved by this course?

Learning outcomes for this course are centred around reflections by participants and capacity to consider gender equality and social inclusion in the context of their work, ensuring that projects are gender responsive and socially inclusive. Participants of this training will be expected to rethink and have capacity to make changes to personnel complement composition by gender as well as inclusion of GESI aspects in their climate-oriented projects.

Increased awareness on gender as a social construct and for everyday mainstreaming

Enhanced articulation of basic information on gender and climate change vulnerability

Increased understanding of gender dynamics associated with climate and climate adaptation

Strengthened understanding on gender sensitivities to existing Climate Funds

Who is expected to take this course?

Climate change is devastating communities, making it imperative that stakeholders who deal with decision making and implementation of projects become enlightened on how to develop projects that address the vagaries of these changes in climate. The course is targeted at governmental and non-governmental agencies and organisations as well as officials that require day to day skills in project development specific to as well as accessing climate finance.

How long is the course?

The total number of hours required to complete the course is estimated at **three (3) hours**.

What to find in this course and where?

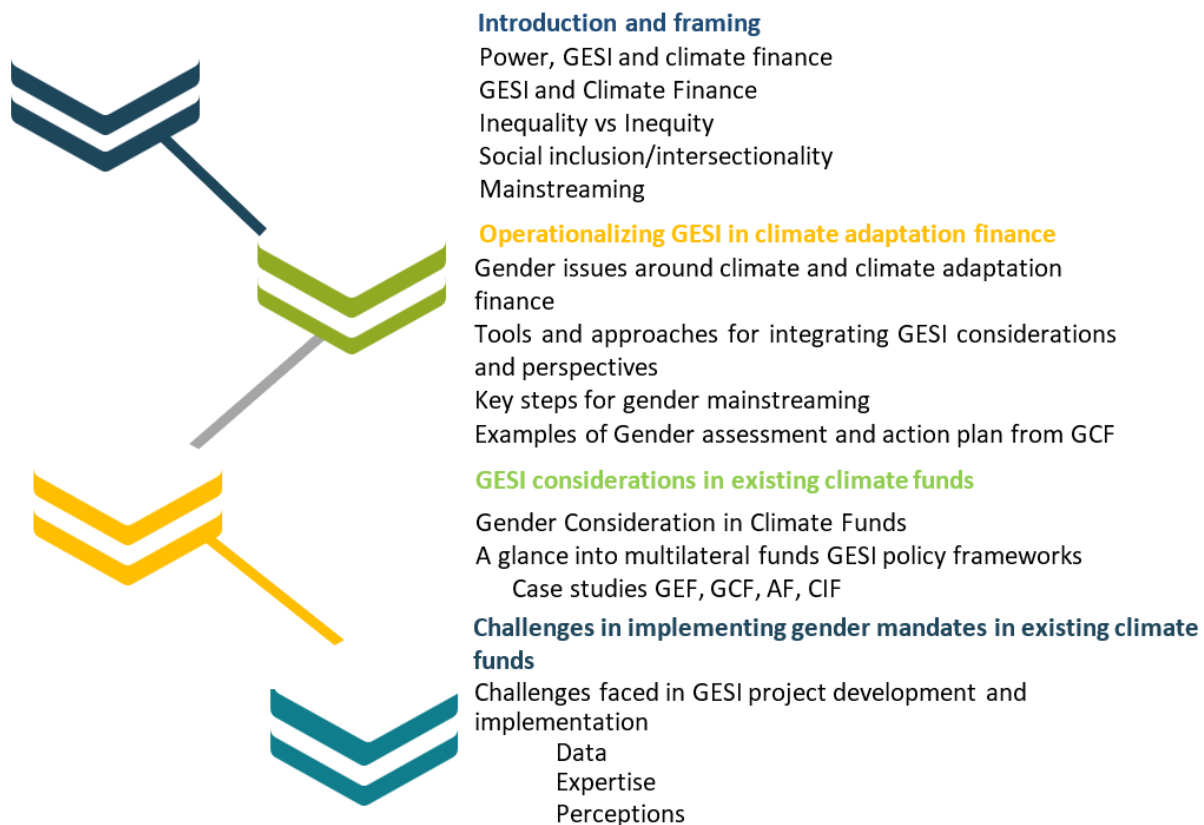
The content of the GESI course responds to the objectives and outcomes of the course as illustrated in Figure 1. The course is made up of four sessions;

Session 1: GESI introduction and framing

Session 2: GESI aspects of climate adaptation finance

Session 3: GESI considerations in existing climate funds

Session 4: Challenges in implementing gender mandates in existing climate funds



Structure of the instructor’s guide

For the instructor’s guide, each of the four sessions is made up of the following:

Introduction - which is the starting point to get an overview of the session and its key points based on research and practice.

Learning objectives for the session-which states upfront what the participants can expect to benefit from the session.

Timing - the section gives a breakdown of the specific activities and time allocation for each of them in the session.

Guidance on use of slides - provides information which is needed by the trainer in deciphering messages from the slides as well as an indication on which of the slides may need attention or specific action to be taken during engagements

Exercises - which indicate the type of exercises to be taken for the session and possible answers, as well as indications of where they can be placed during the session

Modalities of course delivery

The trainer-led time for this course consists of a diversity of methods such as lectures (PowerPoint and off the cuff presentations), participatory sessions (group work, pair work and discussions, brainstorming) and exercises. The breakdown of the hours is also given at the start of each topic, with a minimum of 5 hours of contact time per topic.

1. Lectures

Lectures to be employed for this course are designed to introduce participants to each topic and concepts more than providing very detailed accounts of the subject matter. In this case, PowerPoint slides will be used during these sessions. During lectures, the trainer must encourage active participation and discussion around the introduced concepts and topics. The trainer must provoke discussion and field questions at every opportunity.

2. Evaluation exercises

For this course, exercises are designed to involve tackling questions in both group work and pair work, as well as individual reflection moments. These questions will be posed at the end of each session to evaluate the level of understanding gained from the session. The course is designed to incorporate exercises post session.

3. Group work

Group engagements during the sessions are expected to encourage investigation and independent learning for certain topics as well as deal with focus areas arising from the trainer. Group work engagements will allow for an environment of more critical thinking as well as sharing of lessons from different contexts.

4. Plenary sessions

Plenary sessions for this course are designed to encourage participants to brainstorm and debate on concepts and issues extensively as a precursor to any presentations that are given. In addition, participants are given an opportunity to ask questions as well as report back after exercises in groups and pairs during the plenary sessions. In addition, these engagements will act as evaluation sessions to gauge the level of understanding in the participants.

What to keep in mind when teaching the course

Point to note

The subject of gender and social inclusion can be quite sensitive, especially in the African context where patriarchal systems are predominant in influencing cultural norms as well as decision-making processes. It is therefore critical to keep in mind the diversity of participants and consider the various sensitivities during course engagement. This reality calls for extra caution by the facilitator to not push individual opinions and try to balance the discussion. It is also critical to be aware of individuals who may have strong opinions on the subject matter, and to try to neutralise the discussion to avoid tensions.

Sessions

SESSION ONE: GESI introduction and framing in climate finance

Slides 5-13 of the PowerPoint and pages 7-11 of the workbook

Note: This guide recommends a review of the workbook prior to conducting training for this course.

Introduction

This session focuses on the importance of climate science and evidence-based approaches to accessing climate finance. The context within this section will inform the subsequent sessions on developing a climate rationale.

Learning objectives

On completion of the session, participants are expected to be able to:

- Better understand the meaning of key GESI related concepts and be able to explain them to others;
- Recognize and understand GESI concepts and themes within broader discourses;
- Apply GESI concepts to climate finance for adaptation and mitigation.

Session approach

The session will largely employ brainstorming as the dominant method in addition to PowerPoint presentations to buttress the discussions around concepts and their meanings. The facilitator will start the session by asking participants to brainstorm on each of the concepts in plenary, followed by a brief PowerPoint presentation to highlight the concepts, especially using

graphics presented in the slides. Essentially, key concepts for the short course will be introduced by first facilitating for participant brainstorming around a specific concept as an introduction, and to gauge prior knowledge around the concept, followed by presentation by the facilitator of visuals and infographics on the concept. In the presentation, the facilitator will also take time to enlighten any misconceptions and misunderstandings on the concepts.

Timing

Brainstorming/discussion: 30 minutes

PowerPoint presentation: 15 minutes

Guidance on the use of slides

Detailed resource material for these slides is presented in the workbook version of the course to assist the instructor with in-depth information that supports the slides. This section highlights brief explanations of the information that is presented in slides 6 to 14.

Slide 8: After setting up the scene in slides 6-8 with objectives and a rough introduction to the session, slide 9 provides the basis for the need to understand GESI. The conceptualisation of GESI refers broadly to the range of social categories and attributes that influence a person's experience with different dimensions of climate finance in more or less positive and negative ways. In the same context, 'power' presents itself where people interact with one another, in varied situations bringing to the fore power dynamics or power relations. The slide further highlights that in the climate finance context;

- who has money,
- who is asking for money,
- who decides how grant applications will be written,
- who can write applications,
- who can access climate finance,
- who decides how the money is spent,
- and to whose benefit.

Slides 9-12: Specific information relates to definitions and conceptualizations of 'gender vs sex', 'equality vs equity', intersectionality/social inclusion and gender mainstreaming. For gender and sex, the distinction lies in that the former is socially constructed while the latter is attributed to physiological characteristics. Equity goes beyond equality by addressing fundamental injustices both historical and current to transcend superficial efforts to address inequality. In addition, understanding intersectionality is an entry point into concurrently considering gender and other identities when designing projects that address underlying vulnerabilities. At the end of this conceptualization, gender mainstreaming is presented to explain the act of integrating GESI at every step in developing and implementing projects.

Slide 13: a short quiz of 3 questions is presented at the end of the session, including potential answers that the trainer can use with plenary discussions once participants have been given time to discuss them.

SESSION TWO: Operationalizing GESI in climate adaptation finance

Slides 14-27 of the PowerPoint and pages 12-27 of the workbook

Note: This guide recommends a review of the workbook prior to conducting training for this course.

Introduction

For this session, the instructor and participants establish the link between gender and climate change as well as climate finance by taking participants through the importance of gender to climate vulnerability as well as gender responsive climate. This focus provides an entry point into understanding the link between gender and climate finance as well as climate action and solutions.

Learning objectives

On completion of the session, participants are expected to be able to:

- Establish the link between gender and climate change as well as climate finance
- Outline the various principles around gender responsive climate adaptation financing
- Demonstrate capacity for identification of and planning for stakeholder involvement in project development and implementation

Session approach

This session employs brainstorming activities as a precursor to any PowerPoint presentations, which are mainly used to support outcomes of the brainstorming. Pair and group work is employed to discuss the importance of linking gender to climate change and climate financing as a basis to plenary discussions. Plenary discussions support pair and group work plenary feedback for the trainer to take stock of thoughts during the exercises as well as general discussions around topics for the session.

Timing

Pair work: 5 minutes

Group work: 20 minutes

Plenary discussions: 10 minutes

PowerPoint presentation: 10 minutes

Guidance on the use of slides

Detailed resource material for these slides is presented in the workbook version of the course to assist the instructor with in-depth information that supports the slides. This section highlights brief explanations of the information that is presented in slides 17 to 26.

Slides 16 and 17: These two slides build the connection first between GESI and climate and then between GESI and climate adaptation finance. Various literature is cited to highlight how the death rates of women and children is 14 times higher than that of men during natural disasters, how women are custodians of the home with 80% of the home responsibility towards food production, yet they lack secure tenure and face the most acute risk from climate. At this point, there is first use of terms such as gender blind and gender responsive where the trainer must begin to build an understanding of neutrality where GESI is concerned does not help with addressing related challenges as well as the indication that there is an ultimate expectation towards achieving gender responsive efforts in climate finance projects. The explanation is highlighted as leaning towards addressing root issues around GESI and climate finance.

Slide 18: The trainer must highlight the continuum that shows an understanding of exploitative, gender blind, gender sensitive and finally gender responsive actions that address inclusivity issues. There must be a clear explanation of the need to transition from one of the spectrum to the other in understanding the adaptation finance gap where GESI is concerned.

Slides 19-22: These few slides present information on tools for gender assessments and gender mainstreaming starting from conducting a gender analysis and understanding its impacts, to designing a gender action plan as well as understanding stakeholder engagement in this context.

Slide 19 Starts by highlighting how a gender analysis is useful by building an understanding of gender differences in distribution of resources, opportunities, power etc, identifying gender specific needs and priorities as well as providing a basis for gender consideration in policies and programs.

Slide 20 Highlights potential impacts from a gender analysis as influencing policy decisions and documents, improved knowledge and practice, increased collaboration and motivated new or better-targeted investments.

Slide 21 Highlights how a gender action plan is also a critical tool to come up with gender responsive activities, outputs and outcomes, come up with relevant targets and indicators as well as mechanisms for implementation of GESI designs.

Slide 22 shows a sample action plan that the instructor should present as a handout for participants to go through in groups for them to internalise the required steps in employing the tool.

It is important for the trainer to gather handouts required for this session as well as allow sufficient time for participants to have extensive discussions and share experience in using these tools.

Slide 23: This slide focuses on how to operationalise climate adaptation financing in the context of GESI through employing the following:

- independent evaluation and recourse mechanisms
- gender expertise and gender balance
- gender responsive funding guidelines
- approaches that increase women groups access to funding
- explicit gender considerations/criteria
- gender equality and women empowerment
- regular gender audits
- beneficiary and people-centred approach

The trainer must take time to build an exposition to the participants of how the listed principles can be employed and what they entail, as well as encourage discussion with participants on the principles.

Slides 24 and 25: These are the last two slides of the session, which focus on stakeholders and stakeholder engagement in all stages from designing to implementing GESI related climate financing. **Slide 24** poses the question: *How are stakeholders and actors key to the operationalisation process?* This is an important question that the trainer must bring to the attention of the participants by highlighting three considerations around ‘**who is affected** by the project’, ‘**which process is affected** by the project’ as well as ‘**Which external groupings** besides community are affected by the project?’. A discussion around practical considerations will then lead into practical steps and considerations in **slide 25**. These are presented as;

- views of the main actors are heard
- trust between actors is created
- greater sense of ownership for decisions made
- responsibility for the outcome is taken
- integrated at all stages through dialogue and consensus building
- people centred approach taken
- solutions that provide mutual benefits (win-win)

SESSION THREE: GESI considerations in existing climate funds

Slides 28-36 of the PowerPoint and pages 28-35 of the workbook

Note: This guide recommends a review of the workbook prior to conducting training for this course.

Introduction

Building on the previous session that explored the link between gender and climate change, the instructor now focuses on how GESI is considered within the major climate finance mechanisms. In general, adaptation financing is less prioritised than mitigation. This situation compounds the fact that climate financing has historically lagged in how it takes into account gender and other social inclusion issues for climate adaptation.

Learning objectives

On completion of the session, participants are expected to be able to:

- Characterise the trajectory of gender mainstreaming into climate funds operations
- Establish challenges and gaps for GESI in adaptation financing by Fund
- Apply understanding around multilateral funds and GESI in addressing identified challenges

Session approach

This session employs visual and graphic presentations, supported by a lecture method to introduce participants to important highlights of the issues at hand. The presentation focusing on visuals and infographics indicated in this session is then followed by a plenary question and answer session around the trajectories of gender mainstreaming by multilateral funds. Plenary discussions support plenary engagements for the trainer to take stock of thoughts during the exercises. It is important to note the importance of breaking the presentations and engaging in discussions before continuing with the presentations.

Timing

- PowerPoint presentation: 20 minutes
- Plenary discussions: 25 minutes

Guidance on the use of slides

Slide 28: It is important that the discussion around climate finance highlight current efforts from the global to regional and national level as a basis to understanding interventions from the existing climate funds. To ensure this is covered, the trainer will need to run down some of the examples of such efforts at these levels as indicated in this slide as well as encourage interaction around the issue;

Global-UNFCCC, etc

Continental/regional

- ❖ SADC framework on Gender and Development (1997)
- ❖ 2003 Protocol to the African Charter on Human and People, informed by NEPAD
- ❖ Gender parity principle in the AU Commission (2002)
- ❖ AU Solemn Declaration on Gender Equality (2004);
- ❖ Africa-wide campaign to end violence against women (African Development Forum (ADF), 2008)

AU adoption Gender Policy (2009)

National

- National Gender Plan 2017
- Climate change policy
- Gender Action Plan (2020)
- NDCs 40% mention gender
- NAP

Slides 20 & 30: The trainer will need to make reference to the previous course as having focused on details regarding the climate funds and encouraging a recap on this before providing focus on trajectories where GESI is concerned. The previous course on the basics of climate finance introduces the existing multilateral funds, among them GEF, GCF, Adaptation Fund, CIF. Here, the trainer looks more closely at how GESI is treated and mainstreamed within these funds. The evolution of the policy frameworks and their implementation is provided in an infographic. The trainer should read this infographic on slide 30 together with the details for each fund as provided on slide 31.

For the GEF, there is indication that the Gender Equality policy of 2011 was approved for climate action integration, with a policy review done with implementing partners in 2017 (UNFCCC GAP and targets for gender responsive finance) as well as a Gender Implementation Strategy, which was approved in 2018. The facilitator will then move on to the GCF, who came up with a Gender Policy on funding, an initial GAP 2015, a revised policy and ultimately a Revised Gender Policy and New GAP 2019. The AF had an Initial Gender Policy and Action Plan of 2016, followed by additional guidance to accredited entities on gender responsiveness of projects in 2017, then an Updated Gender Policy approved and New GAP 2021. The trainer will also need to highlight the CIF actions and their timelines as well before moving into the next slide. It will be important to highlight the Initial gender review of 2012, the Durban one of 2011, the New Gender Focal Point in admin unit for new CIF GAP recruited in 2014 as well as a CIF GAP Phase 2. The New CIF

Gender Policy with governance framework for gender integration of 2018 had been approved in 2016

Gender GAP Phase 3 approved 2019

As the instructor runs through these milestones and timelines, it will be important to take note of what exactly was achieved and how much time this has taken before moving straight into specific case studies for the GCF, CIF and AF.

Slides 31, 32 & 33: These 3 slides highlight the evolution of Gender Policy and Action Plan and Requirements for Proposal Submissions for the GCF, the Theory of Change for the Gender Program Phase 2 for the CIF and a case of integrating gender in the AF project/program cycle. The instructor will provoke discussion around participants planned work:

With your current or planned work, have you integrated any similar actions for gender or broader GESI consideration? If so, which ones? If not, do you see potential to introduce such actions or approaches?

This discussion will bring to an end this session with a question:

In groups, reflect and analyse any gaps that you find in the policy development and implementation of GESI. List any additions that you may have to improve on these operations

SESSION FOUR: Challenges in implementing gender mandates in existing climate funds

Slides 37-41 of the PowerPoint and pages 36-42 of the workbook

Note: This guide recommends a review of the workbook prior to conducting training for this course.

Introduction

This session builds on the previous session's focus on GESI operations in climate funds. The trainer must keep in mind that the session aims to increase understanding of the extent to which these operations have achieved progress GESI integration. The previous session highlighted the evolution of the various attempts at gender mainstreaming within different climate finance funds over the past two decades or more. It is critical for the trainer to then follow up on the funds and evaluate challenges and opportunities that may exist, and how they could be addressed or leveraged.

Learning objectives

On completion of the session, participants are expected to be able to:

- Outline the various challenges that have stalled progress of GESI implementation by climate funds
- Demonstrate understanding of the challenges being faced as unique to each of the selected funds

Session approach

This session employs brainstorming, PowerPoint lecture and group work as methods of delivery. The first method to be used in this session is brainstorming, where the trainer asks participants to recall their discussions in the previous section on the gaps that exist in implementation in general terms. The trainer uses flip charts to take note of these challenges and at the same time provoke further discussion on potential opportunities that can be leveraged to improve on operations and frameworks. After this, the facilitator gives a detailed presentation to support the brainstorming.

Timing

- Brainstorming 10 minutes
- PowerPoint presentation: 10 minutes
- Group discussions: 10 minutes

Guidance on the use of slides

A critical point for the trainer to note in this session is that before moving on to discussions on challenges faced by climate funds, it is important to take stock of the positives then build from there to highlight the challenges and gaps that need to be filled by these Funds. The trainer will rely on the positives indicated in the workbook before moving onto slides 38, 39 and 40, where the gaps are. Some of the positives in the AF and GEF include;

Broad stakeholder engagement encouraged participation of often marginalised groups and a gender balance

- Promoting gender parity among project staff and implementers
- Active participation of women in all phases of the project
- Involving the entire community through awareness-raising and sensitization helps broaden understanding of the importance of including women in the socio-economic life of the community and tackle traditional gender roles and norms

Slides 37, 38 & 39: These slides correspond with challenges in data, perceptions and expertise as faced by the Climate Funds. The trainer must pay attention to these factors and encourage an active discussion on them. In all these, the trainer must begin to tease out from the participants what solutions can be used to address these challenges;

- Making connection with women and girls quite difficult in indigenous communities
- Limited funds to collect climate data
- Widespread weaknesses in monitoring and reporting of quantitative and qualitative gender results, with a lot of missing data

- Dearth of accurate and reliable data
- Inconsistent tracking of sex disaggregated data
- Limited details and weak analysis
- only about 55% of GEF projects report on gender
- accounting of gendered results is lacking

With regards to perceptions, there is consensus from the Funds that the following need to be addressed in terms of dealing with perceptions;

- Gender not conceptualised as a major consideration
- Economic as opposed to social criteria tend to be prioritised
- GESI is considered to be 'add-on' rather than mainstream and systematic
- Limited efforts to transcend the gender binary focus to intersectionality issues

The trainer will close the session by leading a discussion around how issues of expertise on GESI can affect smooth implementation of projects through;

- Limiting participation in gender action
- Limited gender related sensitization and awareness
- Limited understanding of gender in design
- Lack of transparent MRV of gender equality results in financing climate action