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# GUIDELINES FOR A GENDER ANALYSIS of City Departments in the City and County of San Francisco

**Prepared by Strategic Analysis for Gender Equity (SAGE) for  
the San Francisco Commission on the Status of Women**

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## ◆ GUIDE TO USING THE GENDER ANALYSIS GUIDELINES\* ◆

### **WHY Is THE CITY AND COUNTY OF SAN FRANCISCO IMPLEMENTING A GENDER ANALYSIS?**

In April 1998, the City and County of San Francisco passed an ordinance (Chapter 12K of the Administrative Code) to implement CEDAW at the local level. This requires the City to ensure the protection of human rights, which includes the elimination of discrimination against women and girls. The Ordinance requires city departments to undergo a gender analysis in three areas: Service delivery; Employment practices, and Budget allocations.

### **OBJECTIVES**

- To review the policies and practices of city departments in order to fully integrate women's needs and concerns and to ensure that the city does not discriminate against women;
- To develop a systematic way of documenting and addressing the differential impact of services, employment policies and budgetary allocations on women and men in a three step process (1) gathering information, (2) assessing the situation, and (3) recommending what, if any, city practices and policies should change to promote gender equality and equity;
- To raise awareness about gender by conducting a gender analysis in a participatory process with department staff, unions, and women's and community groups;
- To summarize the findings and recommendations in a report that will be made widely available through the Commission on the Status of Women; and
- To develop mechanisms to incorporate findings from the gender analysis into decision-making, implementation, and evaluation of a department's policies and practices.

Completing this gender analysis is by no means simple and needs the commitment of departments to this process. It will be a learning experience that will take time and resources. The gender analysis guidelines are a tool to encourage and institutionalize a new way of thinking. The aim is not to produce yet another departmental report but to put a process in motion that will change the way people think on an ongoing basis.

### **WHAT Is CEDAW?**

The Convention on the Elimination of All forms of Discrimination Against Women (CEDAW) is an international human rights treaty adopted by the United Nations General Assembly in 1979 which provides a universal definition of discrimination against women and brings attention to a whole range of issues concerning women's human rights. CEDAW defines discrimination against women and girls as any "distinction, exclusion, or restriction made on the basis of sex which has the effect or purpose of impairing or nullifying the recognition, enjoyment or exercise by women, irrespective of marital status, on the basis of equality between women and men, of human rights or fundamental freedom in the political, economic, social and cultural, civil, legal or any other field."

### **WHAT Is GENDER?**

Gender is a term used to explain how society constructs the difference between women and men. Sex identifies the biological differences between women and men. Looking at gender, therefore, does not focus primarily on women or men, but rather on the relationship between their different roles, responsibilities, opportunities and needs.

\* See definition of useful terms (page 7)

## **WHAT IS A GENDER ANALYSIS?**

Gender analysis is a framework for analyzing the cultural, economic, social, civil, legal and political relations between women and men in society. A gender analysis is one that recognizes that women and men have different social roles, responsibilities, opportunities and needs. It addresses the underlying power relationship between women and men over time and across cultures. The dynamics of this power relationship permeates how society is structured and how decisions are made. This framework takes into account the important links between gender and other social relations such as race, immigration status, language, sexual orientation, disability, age and other status.

## **WHO WILL BE INVOLVED IN THE GENDER ANALYSIS?**

- The Commission on the Status of Women is the lead agency in coordinating the gender analysis of the City's departments.
- The ordinance established a CEDAW Task Force to advise the Mayor, the Board of Supervisors and the Commission about the local implementation of CEDAW.
- Staff from two City departments -- Juvenile Probation and Public Works – will be involved in conducting this initial gender analysis.
- The Commission on the Status of Women will work with communities served by both departments as well as communities involved in the implementation of services, in order to incorporate their needs and concerns into the gender analysis.
- The Commission will also work with associations and unions that represent the department's employees to include their perspectives.
- The Commission has engaged consultants from Strategic Analysis for Gender Equity (SAGE) to develop gender analysis guidelines and facilitate the process of using them with City Departments, women's and community groups and unions.

## **HOW TO USE THE GENDER ANALYSIS GUIDELINES**

### **TIMELINE**

The Juvenile Probation and Public Works Departments will use the guidelines over three weeks, from June 7 - 25, 1999. During the first week, June 7 – 11, project consultants and Commission staff will conduct orientation sessions with members of the staff of both departments to discuss:

- a gender analysis framework;
- useful terms/concepts necessary for a gender analysis;
- process and timeline of using the gender analysis guidelines; and
- how results will be used and next steps.

During the second and third weeks, June 14-25, department staff will complete responses to the gender analysis guidelines. The Commission on the Status of Women staff and project consultants will be available during this period for assistance, if necessary. Completed responses to the guidelines should be sent to the Commission by June 25, 1999 at the latest. The Commission will work with department staff to collect relevant information throughout this process. The Commission and project consultants will analyze the responses and prepare a final report by July 15, 1999.

### **THREE STEP PROCESS**

The gender analysis guidelines cover three areas of a department's work: Services, Employment and Budget. A three-step process has been designed for each of these three areas. Each step, in turn, has been divided into short sets of questions and fill-in tables directed to staff within particular department divisions/bureaus that are identified. Division/Bureau heads are strongly encouraged to create a participatory process among their staff and with women's and community groups, as appropriate, to collect responses to the gender analysis guidelines. This participation is crucial to ensuring that the outcomes reflect the needs and concerns of the departments and the communities they serve and institutionalizing a gender sensitive approach in the long term.

#### **STEP 1: Gathering Gender Disaggregated Data & Reports**

This first step of gathering data on women and men provides a snapshot of existing services, employment practices and budget allocations. City departments must have specific data on women and men, disaggregated by race in order to understand and meet their specific needs. Where available, the data should include related categories of immigration status, language, sexual orientation, disability, age and other status. If data does not exist, departments should review their collection and maintenance of data to adequately address the needs of all women.

In addition, the department must collect relevant reports or studies that may be helpful in the process of completing this gender analysis. These may include those prepared by the department as well as by the communities served by the department.

#### **STEP 2: Assessing the Differences between Women/Girls and Men/Boys**

The aim of the second step is to understand how gender is integrated into the day-to-day operations of the department and their affect on the department's employees and communities served. This involves department staff in providing information related to key issues in each of the three areas of the department's work: Services, Employment and Budget. This step involves collecting information on the budgets for Services and Employment practices. These budget figures are then compiled in the Budget section. This requires coordination between the Bureau/Division staff and the Finance and Administration office.

#### **STEP 3: Formulating Recommendations for Action**

The third step calls for department staff to make specific recommendations to remedy gender inequities uncovered in Step 1 and 2. Recommendations could include revising, expanding or creating mechanisms to promote gender equality and equity. Each recommendation should include specific steps to be taken and with whom, potential financial and human resources, and a time frame to implement these changes.

## ◆ DEFINITION OF USEFUL TERMS ◆

### **GENDER AND SEX**

Gender is a term used to explain how society constructs the difference between women and men. Sex identifies the biological differences between women and men. Looking at gender, therefore, does not focus primarily on women nor on men, but rather on the relationship between their different roles, responsibilities, opportunities and needs.

### **GENDER ANALYSIS**

Gender analysis is a framework for analyzing the cultural, economic, social, civil, legal and political relations between women and men. A gender analysis is one that recognizes that women and men have different social roles, responsibilities, opportunities and needs. It addresses the underlying power relationship between women and men over time and across cultures. The dynamics of this power relationship permeates how society is structured and how decisions are made. This framework takes into account the important links between gender and other social relations such as race, immigration status, language, sexual orientation, disability, age and other status.

### **GENDER DISAGGREGATED DATA**

Gender disaggregated data is data collected and analyzed by sex in order to identify the gaps between women and men for a given situation. This data is essential to designing and delivering effective and equitable services, creating fair employment practices and equitable budget allocations. Where available, the data should include related categories of race, immigration status, language, sexual orientation, disability, age and other status in order to understand and meet the specific needs of all women and men.

### **GENDER EQUALITY AND EQUITY**

Equality between the sexes guarantees equal rights for both women and men. The objective is to correct laws and practices that are discriminatory and to promote equality in an affirmative way especially to ameliorate the conditions of the most disadvantaged. The aim of gender equity is a fairer distribution of rights and resources for all people. Equity applies to the development of policies and the distribution of resources to differently situated women, e.g. race, class, immigration status, language, sexual orientation, disability and other status. The goal is to redress historic discrimination and ensure conditions that will enable women to achieve full equality with men.

### **GENDER SENSITIVE**

A gender sensitive service/policy/program or budget is one that recognizes the fundamental importance of promoting gender equality and equity. Using a gender sensitive approach to analyze, design, implement and evaluate departmental policies/programs takes fully into account the different needs and opportunities of women and men.

### **DISCRIMINATION**

CEDAW defines discrimination against women and girls as any “distinction, exclusion, or restriction made on the basis of sex which has the effect or purpose of impairing or nullifying the recognition, enjoyment or exercise by women, irrespective of marital status, on the basis of equality between women and men, of human rights or fundamental freedom in the political, economic, social and cultural, civil, legal or any other field.” (Chapter 12 K Administrative Code)

## “ SERVICES ”

The purpose of a gender analysis of services is to ensure that all services provided by the department and with contracted partners are designed, implemented and evaluated in a gender sensitive manner. Budget allocation issues are also considered in determining what, if any, changes are needed to promote gender equality and equity in service delivery.

### **STEP 1: Gathering and Analyzing Gender Disaggregated Data and Reports**

- A. Relevant Reports/Studies
- B. Services and Population Served

### **STEP 2: Assessing the Differences in Services between Women/Girls and Men/Boys**

- A. Designing and Implementing Services
- B. Contracting for Services
- C. Community Involvement
- D. Evaluating Services

### **STEP 3: Formulating Recommendations for Action**



### **STEP 1: Gathering and Analyzing Gender Disaggregated Data and Reports**

#### A. Relevant Reports/Studies

*(To be completed by the department's Division/Bureau heads. Request information from women's and community groups where appropriate, i.e. question 1. b.)*

1. Please list and provide copies of reports/studies that focused on gender and services issues over the past five years as well as any reports in progress or under consideration:
  - a. Prepared by Department
  - b. Prepared by women's and community groups, unions, media, researchers, etc. (e.g. Come into the Sun)
2. Please summarize the key findings and recommendations that emerged from these reports.
  - a. How did the department respond or take action to implement the recommendations? If no action was taken, please explain why not?
  - b. How were these responses and actions evaluated? Who participated in these evaluations?
  - c. How much funding, if any, was allocated for follow-up to these responses and actions?

## B. Services and Population Served

*(To be completed by the department's Division/Bureau heads in consultation with staff who provide services. Request information from women's and community groups where appropriate, i.e. impact of services and demographics on population served.)*

1. Please complete the following table for every service provided by the department and specify partners with whom services are implemented. Give a demographic breakdown (as much as possible) for each service in terms of who utilized the service and its impact on women and men.

Title of service/project	e.g. Landscape and architecture project
Aim of the service/project	e.g. Design a city park
Specific activities	e.g. Create a safe public space where women/girls can "see and be seen" and "hear and be heard" to prevent any threats to their security; install public and emergency telephones; ensure that foliage does not obstruct visibility If targeted for women/girls, check box
Budget allocation	e.g. Actual \$ xx and \$ xx as percentage of total division/bureau budget
Source of revenue e.g. General funds, Federal, State, foundation, other, please specify	e.g. General funds
Staff allocation	e.g. Number of staff and hours per week; staffing costs if implemented by partners
Indicators used to measure results	e.g. Relative use by women/girls and men/boys and higher quality of life in annual City Citizen Survey

Name(s) and type(s) of partner(s) \_\_\_\_\_  
other city departments    commissions    community organizations    other (specify)

Population served: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							
What is the impact of this service on women/girls?	e.g. Increased relative use of the park by women and children throughout the day						
What is the impact of this service on men/boys?	e.g. Shared use of park by men/boys and women/girls.						

Average cost of service per individual (budget allocation/total population served): \_\_\_\_\_



This table reflects the important links between gender and other social relations such as race, immigration status, language, sexual orientation, disability, age and other status. We recognize the limitations of available data but wherever data is available, please replicate this table in responding to questions throughout the guidelines:

<b>Diversity Table</b>	White <sup>1</sup>		Black <sup>2</sup>		Asian & Pac. Islander <sup>3</sup>		Hispanic <sup>4</sup>		Am. Indian <sup>5</sup>		Other		Total		Total %	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Immigration Status Citizen Permanent Temporary Undocumented																
Language English Spanish Chinese Tagalog Other (specify)																
Sexual Orientation Lesbian Gay Bisexual Transgender Two Spirit Heterosexual																
Disability (specify)																
Age 0-12 13-25 26-39 40-59 60+																
Other status (specify)																

<sup>1</sup> White (not of Hispanic origin): Persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.

<sup>2</sup> Black (not of Hispanic origin): Persons having origins in any of the original peoples of Africa.

<sup>3</sup> Persons having origins in any of the original peoples of the Far East, South East Asia, the Indian Subcontinent or the Pacific Islands. This area includes, for example, China, Japan, Korea and Samoa. Include data for Filipinos in the Asian Pacific Islander category.

<sup>4</sup> Persons having origins in any of the original peoples of Mexico, Puerto Rico, Cuba, Central or South America, or other Spanish cultures or origins, regardless of race.

<sup>5</sup> Persons having origins in any of the original peoples of the Americas, and who maintain cultural identification through tribal affiliation or community recognition

## **STEP 2: Assessing the Differences in Services between Women/Girls and Men/Boys**

### **A. Designing and Implementing Services**

*(To be completed by the department's Division/Bureau heads in consultation with staff who provide services. Request information from women's and community groups where appropriate, i.e. question 2 & 3)*

1. How does the department set priorities for services provided? Who is involved in this process?
2. How is gender equality and equity integrated in the process of developing programs and services? Are programs designed in collaboration with women/girls who will use the services? If so, how? If not, what are the obstacles to incorporating the perspectives of women/girls?
3. How are needs assessments conducted? What if any criteria are used to focus on gender and discrimination issues?
4. How are department staff trained to be sensitive to issues of discrimination in implementing services? Is the training mandated? How much time is spent on such training? What issues do the trainings address?
5. What outreach efforts does the department make to ensure that the communities served, particularly women/girls, are aware of and can access the services?
6. What kind of related public hearings have been organized? How were the outcomes incorporated into the implementation of services?

### **B. Contracting for Services**

*(To be completed by the department's Division/Bureau heads in consultation with staff who use contractors to provide services.)*

1. How does the department determine which services are contracted out and/or provided by the department? How are potential contractors and organizations identified?
2. Describe the department's process for contracting out services. Is there a Human Rights Commission staff person handling contracts/grants? How is this position funded? Who does the contract compliance officer report to?
3. How are the requests for proposals/bids and list of potential contractors and organizations made accessible to the public to ensure equal opportunity and public scrutiny (e.g. publicizing the names and organizational tables of contractors)?
4. How is gender reflected in requests for proposals/bids? What kind of participatory process exists to review and make decisions on awarding contracts/grants?
5. What specific efforts are made to attract historically excluded contractors including women- (WBE) and minority-owned (MBE) businesses?

Data on contracts/grants awarded in the last fiscal year:

Value of Contract	No. WBEs and/or MBEs contracts	Total WBEs and/or MBEs \$	No. Non-WBEs and/or Non-MBEs contracts	Total Non-WBEs and/or Non-MBEs \$	No. Non-Profit Orgs	Total Non-Profit Orgs \$
0-25 K						
25-50 K						
50-100 K						
100- 500 K						
1-5 MILL.						
5 MILL. +						
Total						

- How does the department communicate the different needs and concerns of women/girls and men/boys to contractors?
- How does the department ensure that contractors receive gender and diversity trainings? What kind of gender and diversity trainings do contractors undergo?
- Of total requests for proposals/bids, what percentage addresses the needs of women and girls?
- Based on the information above, in what value category are the most women owned enterprises awarded the most contracts? the fewest contracts? Explain the differences?

#### C. Evaluating Services

*(To be completed by the department's Division/Bureau heads in consultation with staff who provide and evaluate services. Request information from women's and community groups where appropriate, i.e. question 1 & 4)*

- How does the department engage in long and short range planning and evaluation to ensure gender sensitive services?
- What mechanisms exist to evaluate the impact of services provided by the department on women and girls? Specify if these are conducted internally or with outside evaluators such as the State or women's and community groups. How are contracted services evaluated and by whom?
- What are the major obstacles that hinder the department's ability to provide gender sensitive services (e.g. funds, lack of gender disaggregated data, physical facilities/equipment)?
- What grievance process exists for people who use the department's services?

#### D. Community Involvement

*(To be completed by the department's Division/Bureau heads in consultation with staff who provide services. Request information from women's and community groups where appropriate, i.e. question 1-4)*

- What is the process for communities who receive services to be involved in working with departments to set priorities as to what services will be provided?
- How are women's and community groups involved in assessing the needs of those who use the services provided by the department? How do women's and community groups communicate different needs and concerns of women/girls and men/boys to the department?
- What role do women's and community groups play in designing services provided by the department?
- What channels exist for women's and community groups to give input to the department as it conducts evaluation of the services it provides?

**STEP 3: Formulating Recommendations for Action**

*(To be completed by the department's Division/Bureau heads in consultation with staff who provide and evaluate services. Request information from women's and community groups where appropriate, i.e. recommendations for action)*

1. Identify three to five priority recommendations for action to promote gender equality and equity. Specify time frame, what financial and human resources and how to evaluate each recommendation (i.e. indicators to measure progress)

Recommendation	
Specific activities	
Estimated budget	
Potential source of revenue	e.g. General funds, Federal, State, foundation, other, please specify
Staff allocation	e.g. Number of staff and hours per week; staffing costs if implemented by partners
Indicators used to measure results	
List steps to be taken and specify with whom (i.e. women's and community groups, contracted partners, other city departments)	
Timetable	

## ◆ EMPLOYMENT PRACTICES ◆

The purpose of a gender analysis of employment practices is to determine what measures need to be taken to promote equitable employment practices and ensure the rights of women to equal employment opportunities, equal remuneration, equal benefits and the protection of their health and safety. Budget allocation issues are also considered in order to determine what, if any, changes are needed to promote gender equality and equity in the department's employment practices.

### **STEP 1: Gathering and Analyzing Gender Disaggregated Data and Reports**

- A. Relevant Reports/Studies
- B. Analyzing Workforce Composition

### **STEP 2: Assessing the Differences in Employment between Women/Girls and Men/Boys**

- A. Recruitment
- B. Professional Development
- C. Benefits
- D. Anti-Discrimination Policies

### **STEP 3: Formulating Recommendations for Action**



### **STEP 1: Gathering and Analyzing Gender Disaggregated Data and Reports**

#### A. Relevant Reports/Studies

*(To be completed by the department's head of Personnel and/or EEO staff person. Request information from women's and community groups where appropriate, i.e. questions 1. b. and 2. b.)*

1. Please list reports/studies related to gender , employment practices and equal opportunity issues over the past five years as well as any reports in progress or under consideration:
  - a. Prepared by Department (e.g. Affirmative Action reports prepared annually and given to the Human Rights Commission, Commission on the Status of Women and Civil Service Commission, reports in response to women's and community groups)
  - b. Prepared by women's and community groups, unions, media, researchers, etc. (e.g. Chinese for Affirmative Action's Broken Ladder report)
  - c. Prepared by other entities (e.g. federal or state audit)
2. Please summarize the key findings and recommendations that emerged from these reports.
  - a. How did the department respond or take action to implement the recommendations? If no action was taken, please explain why not?
  - b. How were these responses and actions evaluated? Who participated in these evaluations?
  - c. How much funding, if any, was allocated for follow-up to these responses and actions?

### B. Analyzing Workforce Composition

*(To be completed by the department's head of Personnel with data from the department of Human Resources, if necessary.)*

1. Please provide workforce composition data disaggregated by sex and race: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

2. Please provide data on part-time workers, differentiating between employees that requested (Rq.) part time work and those whose jobs are designed (Ds.) and classified as such.

Sex	Black		White		Asian & Pac. Islander		Hispanic		Am. Indian		Total		Total %	
	Rq	Ds	Rq	Ds	Rq	Ds	Rq	Ds	Rq	Ds	Rq	Ds	Rq	Ds
Female														
Male														
Percent														

3. Please provide workforce composition data by occupational categories: i.e. (A) Officials and Administrators; (B) Professionals; (C) Technicians; (D) Protective Services; (E) Paraprofessionals; (F) Office/Clerical; (G) Skilled Craft; (H) Service/Maintenance; (I) Elected or Exempt

Categ. (A)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (B)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (C)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (D)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (E)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (F)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (G)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (H)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

Categ. (I)	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

- In which categories are women most under represented (i.e. <50%) compared to men? and most over represented (i.e. >50%) compared to men? Please specify job classification.
- What percentage of women were promoted (i.e. moved to a higher paying classification) in each occupational category during the last fiscal year? In which occupational categories and classifications are women being promoted? and not being promoted?
- What percentage of men were promoted (i.e. moved to a higher paying classification) in each occupational category during the last fiscal year? In which occupational categories and classifications are men being promoted? and not being promoted?
- If there is a difference in the percentages of female and male employees promoted, please explain why?

4. Please provide data on occupational categories by employment status: i.e. (PCS) Permanent Civil Service; (PEX) Permanent Exempt; (PV) Provisional Appointment ; (TCS) Temporary Civil Service; (TEX) Temporary Exempt. Duplicate the following table for each of the nine occupational categories.

Occupational Category (fill in) \_\_\_\_\_

PCS	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

PEX	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

PV	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

TCS	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							

TEX	Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
	Female							
	Male							
	Percent							



5. Please provide salary range based on the full time employment (FTE) equivalent salary for each occupational category by sex and race. Duplicate the following table for each of the eight occupational categories. (Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)

Occupational Category (fill in) \_\_\_\_\_

Salary Range PCS	Black		White		Asian & Pac. Islander		Hispanic		Am. Indian	
	M	F	M	F	M	F	M	F	M	F
20 – 29,000										
30 – 39,000										
40 – 49,000										
50 – 59,000										
60 – 69,000										
70+										

Salary Range PEX	Black		White		Asian & Pac. Islander		Hispanic		Am. Indian	
	M	F	M	F	M	F	M	F	M	F
20 – 29,000										
30 – 39,000										
40 – 49,000										
50 – 59,000										
60 – 69,000										
70+										

Salary Range PV	Black		White		Asian & Pac. Islander		Hispanic		Am. Indian	
	M	F	M	F	M	F	M	F	M	F
20 – 29,000										
30 – 39,000										
40 – 49,000										
50 – 59,000										
60 – 69,000										
70+										

Salary Range TCS	Black		White		Asian & Pac. Islander		Hispanic		Am. Indian	
	M	F	M	F	M	F	M	F	M	F
20 – 29,000										
30 – 39,000										
40 – 49,000										
50 – 59,000										
60 – 69,000										
70+										

Salary Range TEX	Black		White		Asian & Pac. Islander		Hispanic		Am. Indian	
	M	F	M	F	M	F	M	F	M	F
20 – 29,000										
30 – 39,000										
40 – 49,000										
50 – 59,000										
60 – 69,000										
70+										

- If there is a difference between female and male employee's salary range, please explain why?
- Please specify the job classifications where this discrepancy is most prevalent for women and men?

## **STEP 2: Assessing the Differences in Employment between Women/Girls and Men/Boys**

### **A. Recruitment**

*(To be completed by the department's head of Personnel, EEO and in-house training staff in consultation with department staff at large. This may also require consultation with Finance and Administration staff.)*

- What specific efforts/initiatives are made to recruit candidates from historically excluded communities including women? (e.g. advertising/post positions in publications that reach women and diverse groups, maintaining lists of women's organizations to call when positions become open, etc.)
- How are required qualifications for jobs reviewed in order to ensure that women have an equal opportunity to the position?
- How does the department train staff involved in recruitment process to be sensitive to issues of discrimination? How are women and diverse staff involved in the recruitment process? What is the process of creating interview panels? What measures are taken to ensure a diverse panel?
- What does the department do to maximize opportunities for historically underrepresented groups including women in occupations that are not traditionally pursued by them?
- Over the past two years what percentage of participants in internship and/or apprenticeship programs are women? How many sought and obtained employment with the department? Please specify by employee status.
- Describe the department's examination process. (e.g. frequency, transparency of announcing exam dates, fair and appropriate/relevant content for each job)
- What percentage of exam takers are women during the past fiscal year? What percentage of women employees is hired as a result of exams? What percentage of women employees is hired without exams?

Complete table for each of the department's recruitment policies/ procedures:

Recruitment policy/ procedure	e.g. Youth Works
Description of policy/procedure	e.g. Mentoring program to hire local high schools students from historically excluded communities
Staff allocation	e.g. Three program analysts supervise an intern for six hours per week.
Results	e.g. Increase student's level of skills and interest in government service as well as exposure to non-traditional employment for women
Budget allocation in the last fiscal year	

Data on total employees recruited: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost of policy/ procedure per employee recruited (budget allocation/total): \_\_\_\_\_

8. What concerns do employees express about the recruitment process? How are the concerns of women and men different?

#### B. Professional Development

*(To be completed by the department's head of Personnel, EEO and in-house training staff in consultation with department staff at large. This may also require consultation with Finance and Administration staff.)*

1. Please describe the department's process for conducting performance reviews (e.g. frequency, content, structure, employee input and peer review). Please attach forms used.
2. What concerns do employees express about the evaluation and promotion process? How are the concerns of women and men different?
3. How does the department encourage employee career advancement? (e.g. access to assignments, in-house training, mentorship programs and external trainings/meetings that enhance skills and lead to promotion etc.) Are financial incentives offered to undergo professional development training? (e.g. child care provision, flexible times, compensatory/overtime, etc.)
4. What concerns do employees express about professional development? How are the concerns of women and men different?
5. Please provide data by sex on professional development training and mentorship programs to reflect how many women and men have benefited from these opportunities.

##### a. In house training

Staff allocation	Results	Budget allocation in the last fiscal year
e.g. Number of staff and hours per week		

Employees served by in-house training: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost per employee trained (budget allocation/total employees trained): \_\_\_\_\_

**b. Mentorship or similar programs**

Staff allocation	Results	Budget allocation in the last fiscal year
e.g. Number of staff and hours per week		

Employees in mentorship programs: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost per employee mentored (budget allocation/total employees mentored): \_\_\_\_\_

**c. External trainings/meetings**

Staff allocation	Results	Budget allocation in the last fiscal year
e.g. Number of staff and hours per week		

Employees served by external trainings/meetings: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost per employee trained (budget allocation/total employee trained): \_\_\_\_\_

### C. Benefits

(To be completed by the department's head of Personnel in consultation with department staff at large. This may also require consultation with Finance and Administration staff.)

1. Please describe the parental leave benefits provided by the department. (e.g. paid or unpaid, medical and other benefits during leave, maintaining job security and seniority etc.). How are employees informed of these benefits? Are there differences in the way women and men are informed of these benefits?

Employees received parental leave in last fiscal year: (Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Total budget (i.e. cost to the department) \_\_\_\_\_

Average cost per employee recipient (budget allocation/number of recipients): \_\_\_\_\_

- a. Please provide data on parental leave by sex and duration in the last fiscal year:

	0-3 mos.		3-6 mos.		6-12 mos.		Total		Total as % of workforce	
Sex	Paid	Unpaid	Paid	Unpaid	Paid	Unpaid	Paid	Unpaid	Paid	Unpaid
Female										
Male										

- b. Please provide data on the above employees based on their return to work:

Sex	Same Position	Same salary	Lower Position	Promoted	Did not return
Female					
Male					

- c. Over the last five years, how many employees were promoted to a higher job classification after taking parental leave? Provide demographic breakdown of these employees.
  - d. What concerns do employees express about parental leave benefits? How are the concerns of women and men different? What mechanisms exist for employees to express their concerns?
2. Describe the department's child care facilities and/or other provisions/resources (e.g. available spots, number of people on waiting list, hours of operation, age limitations, provisions for sick children, cost to employee, etc.) How are employees made aware of this information? If so, please provide any written materials. Does this include information for employees on graveyard or early morning shifts? How are assessments made of employee child care needs?

Employees receiving child care benefits in the last fiscal year: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Total budget \_\_\_\_\_

Average cost per employee recipient (budget allocation/number of recipients) \_\_\_\_\_

- a. What concerns do employees express about child care? How are the concerns of women and men different? What mechanisms exist for employees to express their concerns?
3. Please describe the kinds of flexible work options available to employees. If none, why not? If they exist, how are employees informed of the options? Please provide any written materials.
- a. Please provide data on flexible work option by gender and occupational category as of June 1, 1999. i.e. (A) Officials and Administrators; (B) Professionals; (C) Technicians; (D) Protective Services; (E) Paraprofessionals; (F) Office/Clerical; (G) Skilled Craft; (H) Service/Maintenance; (I) Elected or Exempt

Sex	A	B	C	D	E	F	G	H	Total	Total as % of workforce
Female										
Male										

- b. Of the employees above, which flexible work options are most commonly used by women and which by men? What effect does utilizing flexible work options have on the accrual of work-related benefits, seniority and promotion?
- c. Are there job classifications for which the department has found it difficult to permit flexible work options? If so, why?
- d. Does the department offer work-share options?
- e. What concerns do employees express about flexible work options? How are the concerns of women and men different? What mechanisms exist for employees to express their concerns?

4. In which occupational categories can employees receive overtime and compensatory time benefits?

Employees who received compensatory time benefits in last fiscal year: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Total budget \_\_\_\_\_

Average cost per employee recipient (budget allocation/number of recipients) \_\_\_\_\_

Employees who received overtime benefits in the last fiscal year: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Total budget \_\_\_\_\_

Average cost per employee recipient (budget allocation/number of recipients) \_\_\_\_\_

- a. What concerns do employees express about compensatory and overtime? How are the concerns of women and men different? What mechanisms exist for employees to express their concerns?
5. What provisions exist to protect the physical safety of department staff? What provisions exist to protect the safety of staff that works graveyard or early morning shifts? What concerns do staff express about safety while at work? How are the concerns of women and men different? How are women's concerns for safety addressed?

#### D. Anti-Discrimination Policies

*(To be completed by the department's EEO staff in consultation with the department's staff at large. This may also require consultation with Finance and Administration staff.)*

1. Please list specific department practices used to implement the city's Equal Employment Opportunity program with a brief description of the activities, staffing structure and results of each policy/procedure:

EEO policy/ procedure to eliminate discrimination (include name and aim)	
Description of policy/ procedure	
Staff allocation	e.g. Number of staff and hours per week
Results (state evaluation criteria and actual results)	
Budget allocation in the last fiscal year	

Employees served: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost per employee served (budget allocation/total employees served) \_\_\_\_\_

2. How are employees informed of the department's EEO policies? What concerns do employees express about EEO policies/procedures? How are the concerns of women and men different?
3. Are there any specific policies/procedures to eliminate discrimination required as a result of court orders?
4. Describe the department's grievance process to address discrimination? (e.g. Who is the point person to receive complaints? How is he/she trained to respond sensitively to gender and diversity issues? If so, how?) How are employees informed of the grievance process?
5. If there is an internal finding of discrimination, what discipline is administered? For how long and under what circumstances does a finding "for cause" remain in the employees personnel file?



6. Please provide information on each discrimination complaints and/or grievances filed in the last fiscal year:

Gender of complainant employee	e.g. Female
Race of employee	e.g. Asian (Vietnamese America)
Occupational category and classification of employee	e.g. Skilled craft; Stationary Engineer (sewage plant)
Reason filed	e.g. sexual harassment
Position of person to whom employee first complained	e.g. EEO officer
Position of person who resolved complaint	e.g. EEO officer
If financial costs were incurred, specify source	e.g. staff time (\$ xx); paid leave for complainant (\$ xx); cost of settlement (\$ xx); legal fees (\$ xx)
Length of time to resolve complaint	e.g. three months
Final outcome (i.e. impact on both the complainant and the accused)	e.g. harassment charge found to be "for cause"; complainant given paid stress leave and accorded settlement; accused transferred to another department and disciplined by one week unpaid leave; sexual harassment training mandated for all staff

- How are discrimination complaints reviewed for patterns of problems? What is done to resolve underlying problems of discrimination?
- What concerns do employees express about the grievance process? How are the concerns of women and men different?

7. Please provide staff and budget allocations for the department's grievance process

Staff allocation	Budget allocation in the last fiscal year

Employees served by grievance process in the last fiscal year: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost per employee served (budget allocation/total employees served) \_\_\_\_\_

8. Are gender and diversity trainings conducted in the department? If so, is it in response to complaints or are they mandatory? How often, how widely and with who are they conducted? What issues do the trainings cover? How do the department staff manuals address discrimination issues? How often are they reviewed and updated? What follow-up mechanisms have been created and how do they contribute to institutional change?
9. What concerns do employees express about the gender and diversity trainings? How are the concerns of women and men different?
10. Please provide staff and budget allocations for the department's gender and diversity trainings

Staff allocation	Budget allocation in the last fiscal year

Employees who participated in gender and diversity trainings in the last fiscal year: *(Where available, the data should include related categories of: immigration status, language, sexual orientation, disability, age and other status. See diversity table, page 11.)*

Sex	Black	White	Asian & Pac. Islander	Hispanic	Am. Indian	Total	Total %
Female							
Male							
Percent							

Average cost per employee trained (budget allocation/total employees trained) \_\_\_\_\_

11. Does a support mechanism exist for women employees (e.g. Women's Caucus, task force)? What is its mandate? How does the department head and managers support and encourage participation?

Support mechanism for women (include name and aim of group)	Staff allocation	Budget allocation in the last fiscal year
	e.g. Number of staff and hours per week	

12. What concerns do employees express about strengthening or creating a peer support mechanism for women?

**STEP 3: Formulating Recommendations for Action**

*(To be completed by the department's Division/Bureau heads, EEO and in-house training staff. Request information from employees, women's and community groups where appropriate, i.e. recommendations for action)*

1. Identify three to five priority recommendations for action to promote gender equality and equity. Specify time frame, what financial and human resources and how to evaluate each recommendation (e.g. indicators to measure progress).

Recommendation	
Specific activities	
Estimated budget	
Potential source of revenue	e.g. General funds, Federal, State, foundation, other, please specify
Staff allocation	e.g. Number of staff and hours per week; staffing costs if implemented by partners
Indicators used to measure results	e.g. Number of women recruited
List steps to be taken and specify with whom (i.e. women's and community groups, contacted partners, other city departments)	
Timetable	

## ◆ BUDGET ◆

The budget reflects the priorities of a City and its' Departments—who it values, whose work it values and who it rewards. A gender sensitive budget is not a separate budget for women. It is an effort to breakdown the department's overall budget allocation in order to determine how and in which areas budget allocations are made and the impact of these decisions on different groups of women and men. This section ends with reviewing how and which budgetary allocations and practices need to be changed in order to better incorporate and meet the needs of women and girls.

### **STEP 1: Gathering and Analyzing Gender Disaggregated Data and Reports**

- A. Relevant Reports/Studies
- B. Overall Budget

### **STEP 2: Assessing the Differences in Employment between Women/Girls and Men/Boys**

- A. Services
- B. Employment

### **STEP 3: Formulating Recommendations for Action**



### **STEP 1: Gathering and Analyzing Gender Disaggregated Data and Reports**

*(To be completed by the department's head of Finance and Administration. Request information from women's and community groups where appropriate, i.e. questions 1. b. and 2. b.)*

#### A. Relevant Reports/Studies

1. Please list reports/studies that focused on gender and budget issues over the past five years as well as any reports in progress or under consideration.
  - a. Prepared by Department
  - b. Prepared by women's and community groups, unions, media, researchers, etc.
2. Please summarize the key results and recommendations that emerged from these reports.
  - a. How did the department respond or take action to implement the recommendations? If no action was taken, please explain why not?
  - b. How were these responses and actions evaluated? Who participated in these evaluations?
  - c. How much funding, if any, was allocated for follow-up to these responses and actions?

## **B. Overall Budget**

*(To be completed by the department's head of Finance and Administration. Request information from women's and community groups where appropriate, i.e. question 2)*

1. Please provide total department budget by division/bureau for the past fiscal year. How are budget decisions made within the department? Which staff members are involved in this process?
2. How is the public involved in the budget process? How are women, women's and community groups involved?
3. If additional money were made available, what services and or employment practices would you create or expand in the short term? and in the long term?

Division/Bureau	Budget
Total	

## **STEP 2: Assessing the Differences in Services between Women/Girls and Men/Boys**

### **A. Services**

*(To be completed by the department's head of Finance and Administration using data gathered in Part I. Services. Request information from women's and community groups where appropriate, i.e. question 2. C & 4-6)*

1. Based on data gathered on budget allocation for each of the department's services (See Services section, Step 1, B. 1) please provide:
  - a. the total budget allocation for all services \_\_\_\_\_
  - b. the total budget allocation for all services targeted for women/girls (add budgets for those services with check marks) \_\_\_\_\_
2. Specify the amount and percentage of the total budget allocation for all services targeted for women/girls funded by general fund, Federal, State, foundation, other, please specify.

Budget for services targeted for women/girls by source of revenue:

Total allocation	General fund	Federal	State	Foundation	Other, please specify	Total
Amount						
Percentage of total						

- a. Are any of these funds mandated by specific ordinances? Are funds for services targeted for women/girls sustainable? Is there multi-year funding?
- b. What are the potential sources of revenue for services targeted for women/girls? What are the obstacles to securing such funding?
- c. Is there any collaboration with women's and community groups to develop funding strategies for services targeted for women/girls? Please explain.

3. How are budget requests for services evaluated for their effects on each gender?
4. How is gender incorporated to ensure that both sexes benefit from public expenditures on services?
5. How are budget priorities linked to needs assessments of those who use the services provided by the department? Do these needs assessments take into account the extra or invisible cost often faced by women and girls in using these services? (e.g. costs of transportation, child care, and time off from paid employment)
6. In what service areas was the budget increased from the allocation in 1997 to 1998? Who made this decision and why? Which populations did this increase benefit?
7. In what service areas was the budget decreased from the allocation in 1997 to 1998? Who made this decision and why? Which populations did this decrease affect?

#### **B. Employment**

*(To be completed by the department's head of Finance and Administration using data gathered in the Employment section. Request information from women's and community groups where appropriate, i.e. question 2. C & 4-6)*

1. Based on data provided in the Employment Section (Step 2, A-E), please complete table on the following page.
2. For each line item, compare the female, male and average cost per head.
  - a. Identify the items where females or males fall below the average cost per head. Explain the reason for this.
  - b. Identify the items where females or males fall above the average cost per head. Explain the reason for this.

Budget Item (1)	\$ spent on Females (2)	No. of Females (3)	\$ per Female (4)	\$ spent on Males (5)	No. of Males (6)	\$ per Male (7)	Avg. spent per employee {(2+ 5)/(3 + 6)}
Source: Employment Section Step 2, A							
<b>Total Salary</b>							
Compensatory time							
Overtime							
Parental leave							
Total							
Source: Department Budget & Employment Section Step 2, A 2 a							
<b>Benefits</b>							
Retirement							
Social security							
Health care							
Dental care							
Unemployment							
Disability insurance							
Child care							
Total							
Source: Employment Section, Step 2, B							
<b>Professional Development</b>							
In-house training							
Mentorship							
External trainings/meetings							
Total							
Source: Employment Section, Step 2, C.1							
<b>EEO Policy/Procedure</b>							
Use categories identified							
In the employment section							
Total							
Source: Employment Section, Step 2, D							
<b>Discrimination</b>							
Grievance process							
Gender and diversity							
trainings							
Support mechanism for							
women							
Total							
Source: Employment Section, Step 2, E							
<b>Recruitment</b>							
Search process							
Training							
Exam process							
Internship programs							
Other							
Total							

### **STEP 3: Formulating Recommendations for Action**

*(To be completed by the department's head of Finance and Administration in consultation with staff involved in the department's budget process. Request information from employees, women's and community groups where appropriate, i.e. recommendations for action)*

1. Based on your experience of conducting a gender analysis of the services and employment budgets, what specific recommendations would you suggest to make the process easier. For each recommendation, specify steps to be taken and with whom, financial and human resources and the time frame to implement these changes.

Recommendation	
List steps to be taken and (i.e. women's and community groups, contacted partners, other city departments)	
Estimated budget	
Potential source of revenue	e.g. General funds, Federal, State, foundation, other, please specify
Staff allocation	e.g. Number of staff and hours per week; staffing costs if implemented by partners
Timetable	



## NOTES

## NOTES

## NOTES

## NOTES