A Guide for Promoting Gender Equality and Inclusiveness in Teaching and Learning Materials

A Path Forward

March 10, 2015
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• The USAID EdData II project is led by RTI International. Data for Education Research and Programming (DERP) is EdData II Task Number 19, AID-OAA-12-BC-00004.
RTI thanks the USAID Africa Bureau Education for the feedback and guidance during the research and writing phases.
• Addressing gender in education programming
• Gender-based violence, and school related gender-based violence
• Child marriage
• Trafficking in persons
• Fostering women’s leadership
A call for equality for and inclusion of all children in education is made explicit by several key education initiatives such as the following:

- Millennium Development Goals
- Dakar Framework for Action
- Education for All

Still, the mechanisms required to ensure quality and inclusion are lacking.

Inclusive education is an approach that necessitates changes in teaching and learning practices so that “... the curriculum is flexible enough to provide possibilities for adjustment to individual needs and to stimulate teachers to seek solutions that can be matched with the needs and abilities of each and every pupil.”

UNESCO, 2005

Teachers are arguably the most important catalyst for successful implementation of inclusive education; their preparedness to do so is crucial.

Because teaching is centered around teaching and learning materials, messages transmitted by such materials—whether explicitly or implicitly—can have a strong and lasting impact on a child’s attitudes and perceptions.
In a study of U.S. textbooks, 24% of the male characters were represented as aggressive, just over 21% were argumentative, and nearly 36% were competitive. In comparison, only 4.9% of female characters were aggressive, 6.5% were argumentative, and 11.4% were competitive (Evans and Davies, 2000).
A comparative review by Blumberg (2007) found that, of the 359 occupations presented in primary-level textbooks, only 15% depicted women in salaried jobs. A study in Syria identified 463 salaried jobs, of which 84% were filled by male characters and 16% by female characters (Blumberg, 2007).

A study on the Let’s Learn English project in Kenya by Kobia (2009) found that male characters were more often represented than female characters in illustrations (i.e., 55.8% for men and boys versus 4.2% for women and girls).

Other equally pervasive forms of exclusion exist, whether they are based on the
- Presence of a disability;
- One’s socio-economic status, class, ethnic background, political orientation, or language; or
- Any of multiple other factors that cause a subgroup of society to be undervalued and underrepresented in society, civic activities, and/or education.

It is critical for full inclusion of all children in access to and participation in education that all forms of bias, discrimination, and underrepresentation be removed.
This guide is intended to

- Inform the development of new materials and evaluations of existing teaching and learning materials
- Provide guidance in equitable and non-stereotypical ways to represent members of all subgroups of a society
- Reach audiences of laypersons and experts in curriculum development, classroom instruction, education administration and policy, and others involved in developing and reviewing classroom-based teaching and learning materials.
Structure of the Guide

• Introduction and Context
• 2-Page content “spreads”
  – Equal Frequency of Representation
  – Gender Equitable and Inclusive Illustrations
  – Gender Equitable and Inclusive Language
  – Gender Equitable and Transformational Roles
• Worksheets
Theme 1. Equal Frequency of Representation

What Issues Do We Face?
Throughout most cultures, specific subgroups (e.g., boys and men, members of a dominant racial or ethnic group) are represented in teaching and learning materials much more frequently than others (e.g., girls and women, members of a minority racial or ethnic group). For example, studies revealed the following statistics:

- Approximately 15 percent of the world population has some form of disability,7 and yet it is rare to see a child with a disability represented in teaching and learning materials.
- In Pakistani textbooks for English, Urdu, mathematics, science, and social studies, girls and women represented only 23.1 percent of all characters.
- In Cameroon, Côte d’Ivoire, Togo, and Tunisia, girls and women represented only 33 percent of the characters in the textbooks.8
- What Are the Consequences?
The teaching and learning materials used in schools can be powerful role models for children. Students are most likely to identify with characters in books if those characters are similar to them—whether they are the same nationality, speak the same language, are of the same age, or have the same physical characteristics. If, in teaching and learning materials, a child does not see characters with whom he or she can identify—whether by language, ethnic group, sex, or other physical characteristics—then the child is likely to learn the implicit, but strong, message that he or she is less important than others. Ensuring the equal representation of all children in teaching and learning materials can help expose all children to positive messages and provide powerful role models.

How to Develop Gender Equitable and Inclusive Materials!
The characters in teaching and learning materials should accurately reflect the range of characteristics in the specific society in which students will use them. Most societies are made up of approximately 50 percent girls and women and 50 percent boys and men; therefore, the characters in teaching and learning materials should reflect this distribution. In contexts where multiple languages are spoken and ethnic groups are present, characters in teaching and learning materials should reflect the distribution of these languages and ethnicities that exists in the broader social context. Because all societies include individuals with various physical, cognitive, and sensory disabilities, characters facing these issues in books should reflect these differences in positive and inclusive ways. In areas where social or political conflicts have resulted in widespread physical violence, characters can be used to address this reality and serve as role models for how to handle trauma.

Given the prevalence of inequality in many aspects of society, ensuring equal representation in teaching and learning materials will take conscious effort and planning. When developing these materials, thought should be given to many considerations to ensure equitable representation of all groups.

Frequency of female and male characters
- In teaching and learning materials, female and male characters should appear with equal frequency. Although a particular story may be focused, for instance, on a male or female character, across all stories and texts in materials, there should be equal representation.

BIAS-FREE EXAMPLES

Gender-Equitable Story Titles

- Cat or the Mat
- Beth and Her Math Test
- The Fall in the Box
- Tom and the Bike
- The Bus Trip
- Ads and His Pet
- The Dog in the Wall
- Massa and Her Drum

Ensure equal representation of male and female characters.
Annex 1. Instructions for Completing the Worksheet

For each statement on the sample worksheet (see Annex 2), place a tick mark (tally) in the appropriate box. Refer to the respective pages within the guide for an explanation and/or example of each question in the worksheet. Be sure to read the text in each of the boxes on the worksheet. In these boxes, make a tick mark (tally) to be sure that you are providing a tick mark for the item to be measured. When all tick marks have been made, within each box indicate the total number of tick marks.

For most statements, overall ratings can be calculated by using the following steps. In some cases, however, the calculations vary to address the unique nature of each criterion; therefore, take care to review the calculations proposed for each criterion to ensure that the proper steps are followed. These steps assume that in the population there are equal numbers of female and male citizens (50 percent of each).

1. Add the total tick marks from the “Female Representations” cell and the “Male Representations” cell. Enter this total as (A): the “total tick marks.”

2. Divide the total tick marks from the “Female Representations” cell by (A): the “total female tick marks” + A. Convert the resulting decimal into a percentage by moving the decimal two places to the right. To get a percentage that is a whole number, round up for numbers .5 and above or round down for numbers below .5. Enter this total as (B): the “total female tick marks” + A.

3. If (B) equals 50 percent, then the balance between female and male representations for this criterion is equal. Circle the overall rating of “1 point” for this criterion.

4. If (B) is less than or equal to 49 percent or greater than or equal to 51 percent, then the balance between female and male representations for this criterion is likely not optimal. Circle the overall rating of “0 points” for this criterion.

The following table presents an example of how to complete the worksheet to determine the rating. For this example, assume a story in which two girls are walking to school together. The girls see a total of five friends on the way to school, one boy and four girls. There are six tick marks for female characters, and one tick mark for the male character.

As you work through the worksheets, some questions may be encountered that are not appropriate (N/A). Note these questions as “N/A.”

| I.B. Make a tick mark (tally) for each character appearing in a story. Make a tick mark if the character is a girl or woman. (This total is from the 2 main girls walking to school) Make a tick mark if the character is a boy or man. (This total is from the 1 boy seen on the way to school). Total “female” tick marks: 6 Total “male” tick marks: 1 | Total number of tick marks: \( 6 + 1 = 7 \) (A) Total “female” tick marks + A: \( 6 + 7 = 13 \) = 86% (B) B = 50%: Assign 1 point B < 49% or > 51%: Assign 0 points |
### Theme 3 Worksheet. Gender Equitable and Inclusive Language

<table>
<thead>
<tr>
<th>Questions</th>
<th>Female or Neutral Representations</th>
<th>Male Representations</th>
<th>Rating Calculations</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. When the sex of a character is not specified, make a tick mark (tally) for each pronoun used. Note: If this is not meaningful within the language of interest, make no tick marks and indicate “N/A” in the Summary Sheet below.</td>
<td>Make a tick mark if a female pronoun (e.g., “she” or “her”) is used. Total “female” tick marks: __________</td>
<td>Make a tick mark if a male pronoun (e.g., “he” or “him”) is used. Total “male” tick marks: __________</td>
<td>Total tick marks: __________ (A) Total “female” tick marks = A. ___ % (B) B = 50%: Assign 1 point. B &lt; 50% or &gt; 50%: Assign 0 points Circle the overall rating: 1 point or 0 points</td>
</tr>
<tr>
<td>B. Make a tick mark (tally) for each instance in which there is a reference to a title or function (e.g., teacher, doctor, farmer). Note: If this is not meaningful within the language of interest, make no tick marks and indicate “N/A” in the Summary Sheet below.</td>
<td>Make a tick mark if a female or neutral form of a title or function (e.g., “chairwoman” or “chairperson”) is used. Total “female” or “neutral” tick marks: __________</td>
<td>Make a tick mark if a male form of a title or function (e.g., “chairman”) is used. Total “male” tick marks: __________</td>
<td>Total tick marks: __________ (A) Total “female” tick marks = A. ___ % (B) B = 50% - 50%: Assign 1 point. B &lt; 50% or &gt; 50%: Assign 0 points Circle the overall rating: 1 point or 0 points</td>
</tr>
<tr>
<td>C. Make a tick mark (tally) for each instance in which there is a reference to a mixed-sex group (i.e., one that includes men and women and girls and boys). Note: If this is not meaningful within the language of interest, make no tick marks and indicate “N/A” in the Summary Sheet.</td>
<td>Make a tick mark if a female or neutral term (e.g., “workers”) is used to refer to a mixed-sex group. Total “female” or “neutral” tick marks: __________</td>
<td>Make a tick mark if a male term (e.g., “workmen”) is used to refer to a mixed-sex group. Total “male” tick marks: __________</td>
<td>Total tick marks: __________ (A) Total “person-first” tick marks = A. ___ % (B) B = 50%: Assign 1 point. B &lt; 50% or &gt; 50%: Assign 0 points Circle the overall rating: 1 point or 0 points</td>
</tr>
<tr>
<td>D. Make a tick mark (tally) for each instance in which there is a reference to a character with a disability. Note: If no characters with disabilities appear in the materials, assign 0 points.</td>
<td>Make a tick mark if person-first language is used. Total “person-first” tick marks: __________</td>
<td>Make a tick mark if person-first language is not used. Total “non-person-first” tick marks: __________</td>
<td>Total tick marks: __________ (A) Total “person-first” tick marks = A. ___ % (B) B = 100%: Assign 1 point. B &lt; 100%: Assign 0 points Circle the overall rating: 1 point or 0 points</td>
</tr>
<tr>
<td>E. Make a tick mark (tally) for each instance in which there is a reference to a character with a disability. Note: If no characters with disabilities appear in the materials, assign 0 points.</td>
<td>Make a mark if appropriate terminology is used. Total “appropriate” tick marks: __________</td>
<td>Make a tick mark if a slang or derogatory term is used. Total “inappropriate” tick marks: __________</td>
<td>Total tick marks: __________ (A) Total “female” tick marks = A. ___ % (B) B = 100%: Assign 1 point. B &lt; 100%: Assign 0 points Circle the overall rating: 1 point or 0 points</td>
</tr>
</tbody>
</table>

**TOTAL POINTS**
### Annex 3. Checklist for Evaluating Teaching and Learning Materials for Gender Equality and Inclusiveness

#### Theme 1. Equal Frequency of Representation

<table>
<thead>
<tr>
<th>Question</th>
<th>1 point</th>
<th>0 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Do named female and male characters appear with equal frequency in story titles?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Do named female and male characters appear with equal frequency in the stories?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Are unnamed characters equally represented as boys and men and girls and women (in either text or illustrations)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Do characters with disabilities appear proportionally in the stories?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Do characters from different ethnic and religious groups appear proportionally in the stories?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Equal Frequency of Representation subtotal**

#### Theme 2. Gender Equitable and Inclusive Illustrations

<table>
<thead>
<tr>
<th>Question</th>
<th>1 point</th>
<th>0 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Are there equally frequent illustrations of male and female characters?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Are 10 percent of the illustrations of male or female characters with disabilities?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Do the illustrations proportionally represent different ethnic and religious groups?</td>
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<td></td>
</tr>
</tbody>
</table>

**Gender Equitable and Inclusive Illustrations subtotal**

#### Theme 3. Gender Equitable and Inclusive Language

<table>
<thead>
<tr>
<th>Question</th>
<th>1 point</th>
<th>0 points</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. When the sexes of the characters are not specified, are masculine and feminine pronouns alternated (i.e., using “he” and “she” alternately, as relevant for a given language)? If these terms do not exist in the language used in the textbook, then mark this as N/A (not appropriate).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Are neutral forms of titles and functions used (e.g., “policeman” instead of “policewoman,” as relevant for a given language)? If these terms do not exist in the language used in the textbook, then mark this as N/A (not appropriate).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. When talking about mixed-sex groups, are neutral terms used (e.g., “workers” instead of “workmen”)? If these terms do not exist in the language used in the textbook, then mark this as N/A (not appropriate).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Is “person first” language used when referring to individuals with disabilities (e.g., use of “a girl who is blind” rather than “a blind girl”)?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Is appropriate terminology used to refer to disabilities and individuals with disabilities (e.g., use of term “intellectual or cognitive impairment” instead of a more slang or derogatory term)?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Gender Equitable and Inclusive Language subtotal**
Pilot Testing of the Guide

- Piloted in early 2014 for ease of use during curriculum development (Malawi and Ethiopia) and against existing materials (Uganda), with a focus on usability by those whose first language is not English.

- Piloted again in late 2014 with wider audience, including Special Olympics, UNICEF, Mehla NGO, Catholic Health Association of India, USAID, Dutch Coalition on Disability and Development, Inclusion Resolution Activist, Christian Blind Mission (CBM), Disability and Development Cooperation Association (bezev), Partnership for Early Childhood Development & Disability Rights, and University of Texas.
Pilot Testing Recommended Changes

- Inclusion of language about physical disabilities
- Refinement and consolidation of worksheets
- Refinement and simplification of language
- Inclusion of additional and more diverse illustrations
Next Steps

- Finalize the guide with USAID guidance
- Rollout the guide to USAID Bureau for Africa education projects
“Since the guide identified the major gender issues in educational materials, it gives direction for curriculum developers on what areas they should pay due attention in preparing materials. In our case, for example, we were able to review the draft materials using the guide and share the findings with curriculum development teams and make some modification.”

Pilot Test Reviewer
More Information

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