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GESI in Practice: A Toolkit for Participatory and Inclusive Planning, Community Project Development, and Policy Advocacy

Disclaimer:

This toolkit is meant as a practical guide to assist local governments, civil society organisations, institutions, industries, grassroots groups, and communities across urban, peri-urban, and rural areas in planning and implementing inclusive, participatory, and gender-responsive initiatives. Users are encouraged to adapt the tools, methods, and guidance to fit their specific contexts, capacities, and local realities. Although every effort has been made to ensure the accuracy, relevance, and usefulness of the content, Sustainedge accepts no liability for any actions taken based on this document. The toolkit is designed to be adaptable and should be supplemented with local knowledge, expertise, and relevant policy frameworks where appropriate.

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Foreword

It gives me great pleasure to present this Toolkit on “*GESI in Practice: A Toolkit for Participatory and Inclusive Planning, Community Project Development, and Policy Advocacy*”. This resource has been developed to enhance the capacities of individuals, institutions, and communities to design and implement more inclusive, participatory, and equitable development initiatives.

In today's rapidly changing world, the principles of equity, inclusivity, and participation are not optional; they are essential for building resilient and just societies. Too often, the voices of women, youth, persons with disabilities, and other marginalised groups remain unheard in planning and decision-making processes. This toolkit offers practical guidance, adaptable templates, and participatory methods to bridge that gap, ensuring development interventions respond meaningfully to the needs and aspirations of all society members.

I invite practitioners, policymakers, civil society organisations, and community leaders to use this toolkit as a dynamic resource, one that can be adapted, contextualised, and enriched through your own experiences. I hope that this toolkit will not only strengthen technical skills but also inspire a more profound commitment to advancing gender equality and social inclusion in every aspect of our work.

On behalf of Sustainedge, I extend my gratitude to all who contributed their time, expertise, and insights in shaping this toolkit. Together, we can build pathways towards a more inclusive and equitable future.



Md. Mamunur Rashid

Managing Director
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Key Terminologies

Capacity Building	The process of developing and strengthening the skills, instincts, abilities, methods, and resources that individuals, organisations, and communities need to survive, adapt, and thrive in a fast-changing environment.
Community-based Organisation (CBO)	A non-profit, locally governed organisation that works at the community level to address social, economic, or environmental issues.
Community Engagement	The process of working collaboratively with and through groups of people in a community to address issues affecting their well-being, ensuring their participation in planning, decision-making, and implementation.
Diversity	Recognition and inclusion of differences in gender, age, ethnicity, disability, socio-economic status, and other social factors, ensuring all voices are valued in decision-making.
Equity	Fairness in treatment, access, and opportunity, recognising that some groups may require additional support to achieve comparable outcomes.
Gender Analysis	A systematic examination of differences in roles, needs, opportunities, and access to resources between men, women, and other gender identities in a specific context.
Gender Equality	The state in which individuals of all genders have equal rights, responsibilities, and opportunities in every aspect of life.
Gender Equality and Social Inclusion (GESI)	An approach that addresses unequal power relations and barriers faced by women, men, and marginalised groups, ensuring full and equitable participation in development processes.
Inclusive Design/ Inclusive Approach	Planning and implementing programmes or interventions in ways that consider the needs of all community members, including marginalised or vulnerable groups.
Intersectionality	A framework for understanding how overlapping social identities (such as gender, race, disability, and class) intersect to shape individuals' experiences of privilege, discrimination, or exclusion.
Labour/ Workforce Participation	Involvement of individuals in formal or informal economic activities, ensuring fair and inclusive access to employment and income-generating opportunities.
Marginalised Groups	Individuals or communities that experience systemic disadvantage or exclusion from full participation in social, economic, or political life due to identity, status, or circumstance.
Monitoring, Evaluation, and Learning (MEL)	An ongoing process of assessing the design, implementation, and results of programmes or interventions, to improve performance, learning, and accountability.

Participatory Approaches	Methods that actively involve stakeholders, especially community members, in planning, decision-making, and implementation processes.
Policy Advocacy	Actions aimed at influencing public policy, laws, regulations, or institutional practices to promote social change, equity, or inclusion.
Stakeholder	Any individual, group, or organisation that has an interest in, or may be affected by, a programme, project, or policy.
Social Inclusion	Efforts to ensure equal opportunities, access, and participation for all individuals in social, economic, and political life.
Sustainability	The ability of programmes, interventions, or community initiatives to continue delivering benefits over the long term without dependence on external support.
Tools and Techniques	Structured methods, guides, or resources used to plan, implement, assess, or facilitate activities in community development, capacity building, or advocacy.
Vulnerability	The degree to which individuals or groups are at risk of harm due to exposure to social, economic, political, or environmental challenges – often exacerbated by marginalisation or exclusion.
Women’s Leadership	The ability and opportunity for women to influence decision-making, lead initiatives, and hold positions of authority in community, organisational, or policy contexts.
Workshop/ Training Session	A structured session aimed at building knowledge, skills, or awareness among participants through interactive, participatory methods.

Purpose of the Toolkit

This toolkit offers a structured and comprehensive framework to support individuals, groups, institutions, and industries committed to advancing Gender Equality and Social Inclusion (GESI). It presents participatory processes, practical guidance, and adaptable tools and templates across four interconnected components:

- Organising training
- Facilitating participatory planning sessions
- Designing community-based projects
- Supporting policy advocacy

Together, these components enable stakeholders to promote inclusive, equitable, participatory, and sustainable development processes that meet the diverse needs of communities.

Target Audience

This toolkit is intended for a wide range of users involved in inclusive community development and gender equality efforts, including:

- Local governments and municipal officials
- Civil Society Organisations (CSOs) and Non-Governmental Organisations (NGOs)
- Grassroots groups and Community-based Organisations (CBOs)
- Community leaders and activists
- Development practitioners and programme managers
- Private sector actors
- Institutions aiming to enhance inclusive and participatory practices

It is especially useful for those working with or supporting marginalised and underrepresented populations, such as:

- Women and girls
- Youth and adolescents
- Labourers and informal workers
- Persons with disabilities
- Ethnic minorities and other vulnerable groups

The toolkit is adaptable for use in urban, peri-urban, and rural environments.

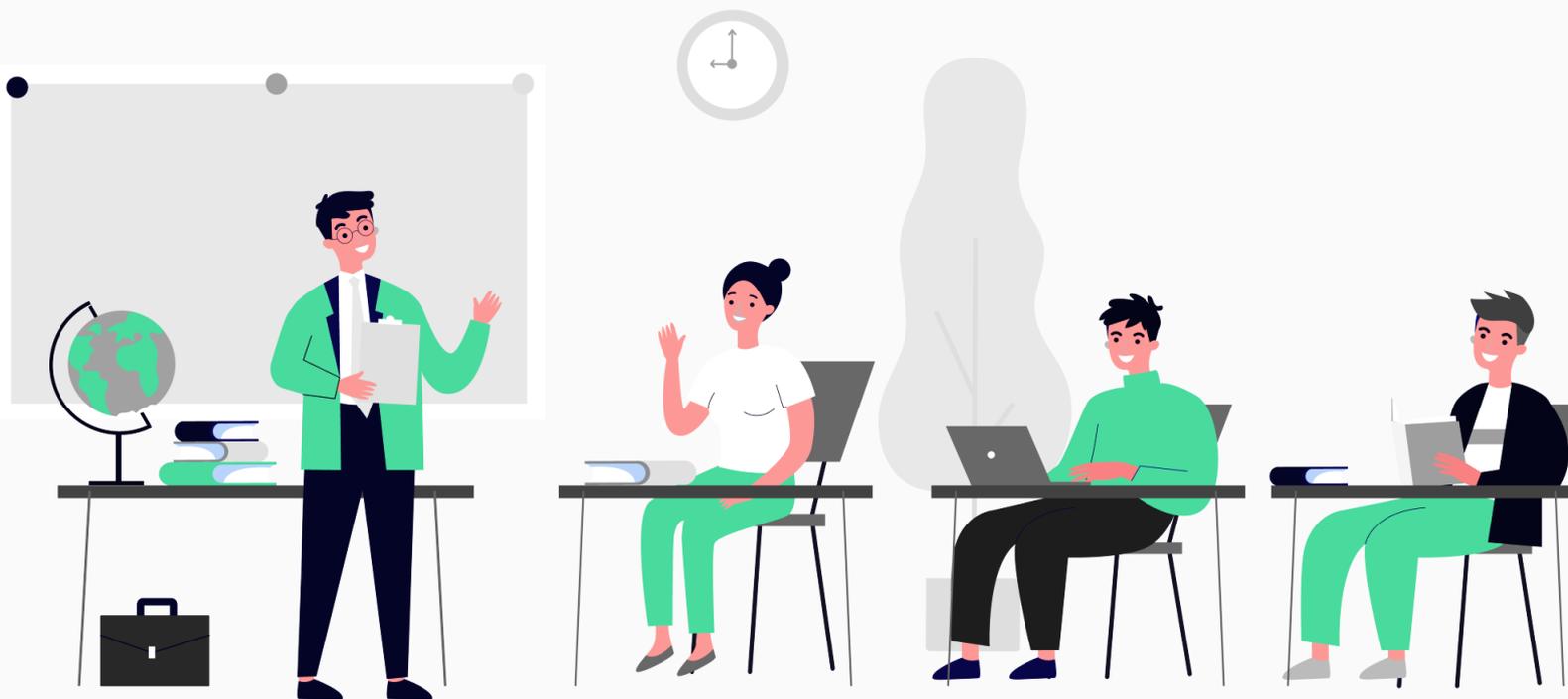
How to Use this Toolkit

The toolkit is organised into four components, each designed to support a specific aspect of inclusive, participatory, and GESI-responsive community development.



Organising Training
Assists users in evaluating training needs, creating inclusive and gender-responsive curricula, and facilitating practical capacity-building sessions.
Facilitating Participatory Planning Sessions
Provides tools and strategies to involve a variety of stakeholders in planning processes, aiding the identification of community priorities and fostering consensus.
Designing Community-based Projects
Outlines steps to turn participatory planning into actionable, community-led projects with clear goals, budgets, and monitoring mechanisms.
Supporting Policy Advocacy
Helps users identify policy gaps, craft evidence-based advocacy messages, and engage decision-makers to drive systemic and inclusive change.

Users can utilise all four components together or separately, based on their specific goals and needs. The toolkit is deliberately adaptable and can be customised to local contexts, capacities, and resources, making it a practical and user-friendly resource for various development requirements.



Organising Training

This component emphasises planning and delivering inclusive, gender-sensitive, and participatory training sessions that enhance local GESI capacity. The process begins with identifying participants, reviewing existing data, and addressing accessibility and inclusivity needs. A needs assessment is to be conducted to inform the development of training objectives and expected outcomes. Based on this, customised training content to be developed, incorporating gender analysis and relevant case studies, and delivered through interactive methods such as group discussions, role-plays, and storytelling. Experienced trainers and facilitators will lead the sessions, ensuring all voices, particularly those of marginalised groups, are heard. Lessons and feedback are to be documented, and evaluation tools are to be utilised to strengthen future training sessions.

Aim	To design and deliver inclusive, gender-sensitive, and participatory training that builds capacity and addresses local GESI needs.
Pre-Activity Tasks	<ul style="list-style-type: none"> • Identify target participants and their backgrounds • Determine focus areas and preliminary objectives • Review existing assessments or baseline data • Plan for accessibility and inclusivity (language, mobility, childcare, cultural considerations)
Activities	<ul style="list-style-type: none"> • Conduct a needs assessment using surveys, interviews, or focus group discussions • Define SMART training objectives and expected outcomes

	<ul style="list-style-type: none"> • Develop gender-sensitive and inclusive training content with relevant examples and case studies • Select participatory delivery methods and facilitators experienced in GESI • Implement training sessions using group discussions, role-plays, storytelling, and simulations • Facilitate inclusive participation, encouraging experience-sharing and collaboration
Expected Outcomes	<ul style="list-style-type: none"> • Participants gain knowledge, skills, and confidence in inclusive planning and GESI principles • Marginalised groups are actively engaged • Lessons learned and feedback are documented for improving future training

Example: Gender Equality and Social Inclusion Integration in Development Initiatives Training Manual for Ethiopian Practitioners

In May 2024, the Ministry of Planning and Development of Ethiopia, in collaboration with CDKN Africa, produced a Gender Equality and Social Inclusion (GESI) Training Manual designed to strengthen the skills of practitioners from government institutions, NGOs, and civil society to implement inclusive approaches in planning and development. The manual covers core concepts of gender equality, social inclusion, and intersectionality, while providing practical, participatory methods such as role-plays, games, and scenario-based discussions that foster dialogue and collective problem-solving. It serves both as a standalone training resource and a facilitation guide, structured to help practitioners carry out needs assessments, set objectives, and design interventions that address the realities of marginalised groups. By including culturally relevant examples and exercises, the manual ensures the material resonates with Ethiopian practitioners and enhances institutional capacity to mainstream GESI across sectors. Ultimately, this initiative offers a replicable model that demonstrates how the localisation of training resources can promote more equitable, inclusive, and context-sensitive development outcomes.

Source: CDKN. (2024). Gender Equality and Social Inclusion Integration in Development Initiatives Training Manual [[Link](#)]



Facilitating Participatory Planning Sessions

This component focuses on creating inclusive spaces where diverse stakeholders collaborate to jointly shape community priorities and strategies. Relevant stakeholders, including government officials, CSOs, private sector actors, community representatives, women, youth, and marginalised groups, are to be mapped, agendas prepared, and logistical arrangements made to ensure accessibility and inclusivity. Sessions are to be facilitated using participatory techniques, such as small group discussions, world cafés, problem-tree analysis, and mapping exercises, to guarantee that quieter voices and marginalised perspectives are heard. Inputs and priorities are to be documented through visual and written tools, and consensus on goals and strategies is to be built using negotiation or voting methods. The process culminates in an action plan with defined activities, responsibilities, timelines, and resource requirements to ensure participant ownership and follow-through.

Aim	To involve a wide range of stakeholders in inclusive, participatory planning processes, ensuring that community priorities and perspectives, especially from marginalised groups, are reflected in decision-making.
Pre-Activity Tasks	<ul style="list-style-type: none"> • Map relevant stakeholders, including government officials, community leaders, CSOs, private sector actors, and marginalised groups (women, youth, persons with disabilities) • Prepare an agenda that allows inclusive participation and interactive engagement

	<ul style="list-style-type: none"> • Arrange logistics and accessibility needs for all participants (venue, seating, materials, language support)
Activities	<ul style="list-style-type: none"> • Facilitate sessions using participatory techniques such as small group discussions, world cafés, problem-tree analysis, or mapping exercises • Encourage open dialogue and ensure quieter voices are heard • Capture community inputs and priorities accurately using notes, charts, or visual tools • Build consensus on shared goals and strategies through facilitated negotiation or voting exercises • Develop an action plan with defined activities, responsible parties, timelines, and resource allocations
Expected Outcomes	<ul style="list-style-type: none"> • Diverse stakeholders actively participate and contribute to planning • Community priorities, including those of marginalised groups, are identified and documented • Consensus is built on shared goals and strategies • A practical, inclusive action plan with clear roles, responsibilities, and timelines is produced

Example: Gender-Inclusive Facilitation in the Solomon Islands

In the Solomon Islands, community-based resource management projects have shown how gender-sensitive facilitation enhances participatory planning. Traditionally, women were excluded from decision-making regarding fisheries and coastal resource use. To address this, facilitators adopted inclusive strategies, such as holding pre-meetings with women's groups to boost confidence, employing women as facilitators in mixed gatherings, and scheduling sessions at times suitable for women with substantial household responsibilities. Single-sex group discussions allowed women to openly share their concerns before contributing in larger forums. These methods ensured that women's priorities, like food security, access to nearshore resources, and household livelihoods, were incorporated into action plans alongside those of men. Consequently, community management strategies became more equitable and better reflected the needs of all resource users.

Source: Kleiber et al. (2019). Gender-inclusive facilitation for community-based marine resource management. An addendum to "Community-based marine resource management in Solomon Islands: A facilitators guide" and other guides for CBRM. Penang, Malaysia: CGIAR Research Program on Fish Agri-Food Systems. Program Brief: FISH-2019-08 [\[Link\]](#)



Designing Community-based Projects

This component concentrates on turning community priorities into practical, inclusive projects that address local needs. Communities are to be engaged through consultations, focus groups, or workshops to gather project ideas, with a focus on participation from women, youth, and persons with disabilities. Ideas are then evaluated against agreed criteria such as urgency, feasibility, impact, and sustainability, and prioritised using participatory methods like ranking or voting. Selected projects are to be developed in detail, defining objectives, outcomes, indicators, and preparing work plans and budgets with gender-sensitive and inclusive provisions. Responsibilities are to be clearly assigned, implementation carried out with active community involvement, and progress monitored to enable timely adjustments and ensure responsive, inclusive, and sustainable projects.

Aim	To turn community-identified priorities into practical, inclusive projects with clear aims, budgets, roles, and monitoring systems.
Pre-Activity Tasks	<ul style="list-style-type: none"> • Conduct community consultations, focus groups, or workshops to gather project ideas • Identify and engage marginalised groups (women, youth, persons with disabilities) to ensure inclusive participation • Establish project selection criteria and planning framework • Prepare logistics for meetings and data collection
Activities	<ul style="list-style-type: none"> • Prioritise projects based on agreed criteria (urgency, feasibility, impact, sustainability) using participatory ranking or voting • Define project objectives, expected outcomes, and measurable indicators

	<ul style="list-style-type: none"> • Develop a detailed work plan and budget, including gender-sensitive and inclusive provisions • Assign responsibilities and set up a monitoring framework • Implement projects with active community participation • Monitor progress regularly and make adjustments based on feedback and observations
Expected Outcomes	<ul style="list-style-type: none"> • Community-driven projects are selected and prioritised transparently • Clear project objectives, outcomes, and indicators are established • Detailed work plan and budget with inclusive provisions are in place • Responsibilities are clearly assigned and monitored • Projects are implemented with active community engagement and ownership • Progress tracking allows for timely adjustments to ensure effectiveness

Example: Women-led Water Entrepreneurship in Satkhira, Bangladesh

In Tengrakhali village, Satkhira, southwest Bangladesh, climate-induced salinity and waterlogging have led to a severe shortage of safe drinking water. In response, WaterAid Bangladesh and local NGO Rupantar introduced the Water Entrepreneurship for Women's Empowerment (WE-WE) approach, which places women at the centre of project design and management. Through participatory assessments, women identified access to safe water as their top priority, leading to the formation of the Golap Mohila Dal (Rose Women's Group) to operate and manage a community-based reverse osmosis plant. The women received training in technical operations, business planning, and financial management, and contributed funds for operation and maintenance, demonstrating strong ownership. Within the first year, the initiative supplied safe, affordable water to nine surrounding villages while generating income for members. Beyond increasing water security, the project built women's leadership capacity, challenged gender norms, and strengthened community resilience.

Source: WaterAid and Rupantar (2021). Water Entrepreneurship for Women's Empowerment (WE-WE), Khulna and Satkhira, Bangladesh. [Link [1](#), [2](#), [3](#)]



Supporting Policy Advocacy

This component focuses on promoting gender equality and social inclusion through evidence-based policy advocacy. Existing policies and institutional frameworks are to be reviewed, affected groups and key stakeholders mapped, and background data gathered to inform advocacy messages. Evidence is to be collected through research, surveys, interviews, and consultations, while clear, solution-oriented messages are developed and coalitions built with CSOs, community groups, media, and academia. Decision-makers are to be engaged through meetings, forums, policy briefs, and presentations, with ongoing monitoring of policy developments and adjustments to strategies as needed. Advocacy outcomes are to be evaluated, and lessons are to be learned.

Aim	To influence policies, laws, and institutional practices to promote gender equality and social inclusion through evidence-based advocacy.
Pre-Activity Tasks	<ul style="list-style-type: none"> • Review existing policies, laws, and institutional frameworks to identify gaps or barriers • Identify affected groups and key stakeholders • Gather background information and relevant data for advocacy • Map potential partners and coalitions for support
Activities	<ul style="list-style-type: none"> • Gather evidence through research, surveys, interviews, and consultations with communities • Develop clear, solution-oriented advocacy messages • Build coalitions and networks with CSOs, community groups, media, and academia

	<ul style="list-style-type: none"> • Engage decision-makers through meetings, forums, policy briefs, or presentations • Monitor policy developments and adjust strategies as needed • Evaluate advocacy outcomes and document lessons learned
Expected Outcomes	<ul style="list-style-type: none"> • Key policy gaps and issues affecting gender equality and inclusion are identified • Evidence-based advocacy messages are developed • Strong coalitions and networks are mobilised to support advocacy • Decision-makers are engaged and informed. • Policy and institutional changes that promote inclusivity are initiated • Lessons learned are documented to improve future advocacy efforts

Example: UN Women’s Policy Advocacy for Gender Equality

Between 2018 and 2021, UN Women carried out extensive policy advocacy at global, regional, and national levels to promote gender equality and women’s empowerment. The Independent Evaluation and Audit Services (IEAS) engaged over 260 stakeholders through interviews, surveys, and focus groups to evaluate the impact of advocacy on policies and institutions. The assessment highlighted UN Women’s role in strengthening government capacity, facilitating evidence-based dialogue with civil society, and translating global gender equality standards into national frameworks. Successful efforts included helping revise discriminatory labour laws, supporting the development of national action plans to prevent violence against women, and promoting recognition of the care economy in Latin America. By bringing together governments, civil society organisations, and partners, UN Women showed its ability to mobilise collective action. The evaluation also emphasised the importance of a more cohesive organisational strategy and stronger partnerships to sustain policy achievements, and it recommended improved monitoring of how policy changes lead to tangible improvements in the lives of women and girls.

Source: UN Women (2022). Corporate Evaluation on UN Women’s Policy Advocacy Work. [\[Link\]](#)

Operational and Logistical Requirements

Effective implementation of GESI-focused initiatives depends not only on well-designed content but also on careful attention to operational and logistical requirements. Ensuring accessible and inclusive venues, appropriate tools and materials, diverse and representative participants, and supportive measures such as childcare, translation, and safe transport is critical for meaningful engagement. Proper planning of these elements allows trainings, participatory planning sessions, community-based project design, and policy advocacy to be conducted in an inclusive, equitable, and responsive manner that addresses the needs of marginalised groups. The table below outlines the key requirements for venues, logistics and support services, participant composition, and additional considerations.

Components	Venue and Platform Requirements	Logistics and Support Services	Participants and Attendance	Additional Considerations
Organising Training	Accessible, inclusive venues such as community centres, training halls, universities, and NGO resource centres should have sufficient space, ventilation, seating, facilities for group work, ramps, accessible toilets, and a secure environment for women and marginalised groups. Virtual or hybrid options, such as those via Zoom, MS Teams, or Google Meet, should include breakout rooms, captions, and other	Audio-visual (AV) equipment, training materials, translation, childcare, refreshments, safe transport (if required), and emergency procedures.	15 to 20 individuals, with a maximum of 30 to 35. A diverse mix of government, CSOs, women's groups, youth, and marginalised communities. Ensure 40 to 50% are women, persons with disabilities, and minorities.	Scheduling, gender-balanced facilitators, rapporteurs for documentation, and follow-up support through WhatsApp, email lists, and repositories.

Components	Venue and Platform Requirements	Logistics and Support Services	Participants and Attendance	Additional Considerations
	accessibility features. Interpretation.			
Facilitating Participatory Planning Sessions	Inclusive, neutral, and accessible venues (such as community halls, municipal meeting rooms, schools, and NGO facilities) should allow for breakout spaces, adequate ventilation, ramps, and accessible toilets. They must be safe for women, youth, and marginalised groups. Virtual or hybrid options should include breakout rooms, translation, and captions.	Facilitation tools (flipcharts, sticky notes, maps, Miro/Jamboard), AV equipment, translation services, refreshments, childcare, safe transportation (if required), and emergency protocols.	20 to 30 participants, maximum 35. Government officials, CSOs, the private sector, youth, and marginalised groups. Ensure 40 to 50% women and underrepresented minorities.	Scheduling, gender-balanced facilitation, neutrality, documentation with notes and visuals, and a feedback loop (reports, bulletin updates, WhatsApp).
Designing Community-based Projects	Accessible, neutral, safe venues such as community halls, municipal offices, and NGO resource centres. Include space for breakout groups, seating, lighting, and ventilation. Offer virtual or hybrid options with participatory tools like	AV facilities for presentations and mapping, planning materials, translation, refreshments, childcare, safe transport (if required), and emergency protocols.	20 to 30 participants, including government, community leaders, CSOs, women's groups, youth, local businesses, and marginalised groups. Ensure that 40 to 50% are women, persons with disabilities, and minorities.	Transparency in project prioritisation, skilled facilitators, clear documentation, feedback loop (reports/roadmaps), sustainability and exit strategies.

Components	Venue and Platform Requirements	Logistics and Support Services	Participants and Attendance	Additional Considerations
	polls, breakout rooms, and Miro/Jam board.			
Supporting Policy Advocacy	Accessible, neutral spaces for dialogue (conference halls, government meeting rooms, universities). Equipped for presentations and discussions (podiums, roundtables, microphones, translation booths). Virtual or hybrid options via Zoom/MS Teams with webinar tools, polls, and translation services.	AV equipment, policy briefs/handouts, translation services, media engagement tools, refreshments, safe transport for marginalised groups, security measures (if politically sensitive).	20 to 40 participants, including policymakers, government representatives, CSOs, women, youth, PWDs, minorities, private sector, media, and academia. Ensure at least 40% women.	Evidence-based messaging, neutrality and credibility, coalition building, documentation, feedback and accountability, long-term advocacy strategy.

Guide and Templates

The following set of templates and tools serves as a useful guide for resourceful, gender-sensitive, and participatory processes in training, planning, project design, and policy advocacy. They are not strict rules; instead, users are encouraged to adapt, expand, or simplify them according to their specific context, institutional needs, and community requirements. The templates aim to inspire ideas and provide structure, while allowing flexibility and innovation to ensure ownership and relevance in different settings.

Organising Training	<ul style="list-style-type: none">• Needs Assessment Questionnaire• Training Design Template• Gender Analysis Checklist• Inclusive Facilitation Guide• Pre and Post-Training Evaluation Forms
Facilitating Participatory Planning Sessions	<ul style="list-style-type: none">• Stakeholder Mapping Template• Facilitation Guide for Inclusive Sessions• Consensus-Building Tool• Participatory Discussion Tool• Action Plan Template
Designing Community-based Projects	<ul style="list-style-type: none">• Structure of Community Consultation• Key Principles for Inclusive Community Participation• Project Prioritisation Matrix• Project Concept Note Template• Budget Template
Supporting Policy Advocacy	<ul style="list-style-type: none">• Policy Gap Analysis Template• Advocacy Strategy Framework• Policy Brief Template

Using this Toolkit

This toolkit is more than just a set of instructions; it serves as a practical guide that inspires action, fosters collaboration, and enhances community resilience. By applying the approaches, tools, and resources provided here, individuals and organisations can work together to turn capacity building, participatory planning, and gender empowerment from concepts into everyday practices.

The true value of this toolkit lies in its application. Adapt the steps to your context, build on the examples, and continue to innovate as you respond to emerging challenges and opportunities. Sustainedge encourages you to share your experiences, learn from others, and contribute to a growing network of practitioners dedicated to inclusive, sustainable, and equitable development. For any assistance or guidance on using this toolkit, please contact: info@sustainedgebd.org.

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Sustainedge is an impact-focused organisation, specialising in social sustainability, ESG and sustainability reporting, gender equality, climate change, and urban development. By integrating assessment, research, policy, advocacy, training, and implementation, we address complex social, environmental and governance challenges holistically. In collaboration with a wide range of stakeholders, we equip individuals, institutions, industries, and communities with the knowledge and tools to drive transformative, long-term sustainability initiatives that foster equity, resilience, and real-world change.