

ONLINE COURSES' GENDER AND DIVERSITY MAINSTREAMING GUIDELINES





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Note from the authors

This publication is based on the Internal Gender and Diversity Mainstreaming Guidelines for the IDBx Program, developed in 2017 by Xenia Cotón Gutiérrez, Learning and Knowledge Management Senior Specialist at the Inter-American Development Bank (IDB), and Ana Urgoiti Aristegui, International Consultant. Special thanks to the IDB Gender and Diversity Division and the Inter-American Institute for Economic and Social Development (INDES) staff and consultants for their support in revising the guidelines for internal use. We would also like to thank Marie Reid, Consultant, for her contributions to developing topics related to instructional design for multicultural audiences in these guidelines.

Inter-American Development Bank

Knowledge, Innovation and Communication Sector

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What will you find in this guide for the mainstreaming of gender and diversity approaches within the development of MOOC?



INTRODUCTION



Purpose, application scope, audience



GENERAL STANDARDS AND PRACTICAL GUIDELINES



Needs assessment



Instructional design, production, implementation and evaluation



CHECKLISTS



Standards related to different process in the creation of a MOOC



ANNEX



More information about gender and diversity



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INTRODUCTION



The Inter-American Institute for Economic and Social Development (INDES) was created in 1994 by the Inter-American Development Bank (IDB). The main objective is to promote knowledge and learning on economic and social development topics in Latin American and Caribbean regions, and it is part of #BIDAcademy. In 2005, INDES launched its virtual courses (Iglesias, 2006), which have evolved, and it is currently offering massive courses, self-training courses, tutored courses, blended¹ courses, and other modalities.

Since 2014, the IDB has offered a series of massive open online courses (MOOCs) on social and economic development topics. The MOOCs are provided free of charge and are open to anyone interested in development issues in Latin America and the Caribbean. The IDB courses are available from edX.org, an online education platform founded by Harvard University and the Massachusetts Institute of Technology (MIT). IDB MOOCs are also available from Coursera. In addition, besides other Bank-supported institutional strengthening interventions, INDES provides specific institutions with non-massive courses targeting a selected audience called Small Private Online Courses (SPOCs).

As theory and practice have demonstrated, there is an increased need to understand the dimensions of gender, culture, and/or diversity and how addressing them can ensure equality in the design and provision of online training (Latchem, 2014).

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This publication aims to contribute to incorporating the cultural and diversity aspect and gender equality into online learning. Furthermore, the purpose is to influence how society perceives women and men's roles differently within an online learning environment.

In the same way, online training can break down stereotypes and social barriers to accessing quality education for African descent, indigenous people, and other traditionally marginalized groups.

UN Women, the United Nations Agency dedicated to gender equality and women's empowerment, has developed a tool for evaluating gender equality-oriented courses. According to this organization, there are several ways to classify gender-sensitive training (UN Women, 2018):

1. Gender neutral: It does not reinforce gender inequalities.
2. Gender-sensitive: Attempts to change or influence gender inequalities.
3. Gender-transformative: Attempts to redefine gender roles and gender relations of women and men.

¹ Blended courses are those that combine face-to-face instruction with online trainings.



When developing any course, special consideration should be given to making it at least neutral, i.e., not perpetuating stereotypes and not offensive to any human group.

These guidelines, such as the UN Women, can inspire professionals in Education to apply the gender perspective in their courses. However, these tools are designed exclusively for courses based on gender-related topics. Regarding diversity, there are no clear recommendations on mainstreaming diversity in the design, development, implementation, and evaluation of courses. We found many sources linked to primary Education and classrooms, but not adult education or online training.

With these guidelines from the Inter-American Development Bank, we intend to share the knowledge acquired by INDES in developing more inclusive and respectful learning interventions with diversity and gender regardless of their subject matter. Specific guidelines have been set on how to create their courses with a gender and diversity perspective. The guidelines also share best practices to be applied in all phases of course development.

The present document shares a set of guidelines to mainstreaming gender and diversity on online courses creation from best practices in the industry of instructional design and policies and procedures on gender and diversity from the Inter-American Development Bank. Note that these guidelines are neither an instructional design manual nor a treatise on gender and diversity principles. Therefore, it is necessary to have prior knowledge in both areas to implement these recommendations.

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1. PURPOSE

This document contains general standards and guidelines *to assist in designing, producing, implementing, and evaluating online courses according to best practices in gender and diversity.*

The IDB has tools that guide the gender and diversity mainstreaming in all projects or knowledge products generated. The most important is the [Gender and Diversity Sector Framework Document](#), the [Update to the Gender Action Plan 2020-2021](#), the [Diversity Action Plan for Operations 2019-2021](#), and the Operational Policies on [Operational Policy on Gender Equality in Development](#) and [Operational Policy on Indigenous Peoples](#)². This publication is framed within these policies and action plans to suggest efficient ways to mainstream gender and diversity approaches in designing, developing, implementing, and evaluating online courses.

In online training, disabilities are closely related to the learning platforms (LMS) and guidelines for web content accessibility (WCAG). For this reason, although diversity includes people with disabilities, these guidelines do not include recommendations for this topic.

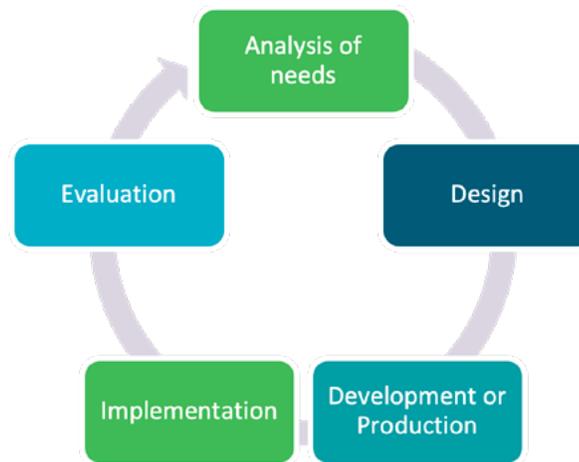
² Only available in Spanish..



2. APPLICATION SCOPE

This document has been developed to be applied to online training courses, although many of the recommendations can also be helpful for face-to-face courses. For the instructional design processes, we have based ourselves mainly on the ADDIE³ model (Analysis, Design, Development, Implementation, and Evaluation), which includes the following procedures:

Figure 1. ADDIE Model Phases



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For each step in the ADDIE model, the authors have developed standards and recommendations to mainstream gender and diversity aspects and thus guidelines the instructional design or pedagogical teams in developing courses respectful of gender and diversity perspectives.

3. THESE GUIDELINES' AUDIENCE

These guidelines are a documentary aimed at any professionals involved in the entire process of designing, developing, implementing, and/or evaluating an online course and institutions that want to implement best practices for mainstreaming gender and diversity in *e-learning*.

4. WHAT WILL YOU FIND AS YOU READ ON?

General standards and practical guidelines:

These are the document's central core and contain a series of qualitative statements and tips for the different phases of creating an online course according to ADDIE processes and those specific to e-learning project management. In this section, guidelines are developed to incorporate the gender and diversity dimensions in the different processes and products of course development.

³ It was developed in 1975 by the Center for Educational Technology at Florida State University.

Each section contains the following elements:

General guide- lines	An introduction to review critical points on each phase is given. It is discussed the what, but not the how, which is explained afterward.
Standard	Outlines each phase's expectations regarding the mainstreaming of gender and diversity dimensions.
Recommendations to consider throughout the process	A series of suggestions on how to incorporate gender and diversity aspects in each phase. Includes specific examples of how to incorporate the gender and diversity dimensions into the products of each phase.

Important note: It is not advisable to use these guidelines if you do not possess a basic knowledge in gender and diversity as it may be difficult for you to understand the importance of some of the recommendations shared.

If you are not familiarized with gender and diversity approaches, it is recommended that you review **Annex A** of this document before reading further. This annex includes basic questions on gender and diversity, which will explain the concepts and recommendations to be incorporated into the course development processes. In addition, suggestions are shared on where to find more content and training opportunities to really take ownership of the subject.

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GENERAL STANDARDS AND PRACTICAL GUIDELINES



This section focuses on determining a comprehensive quality framework for incorporating a gender and diversity approach in developing and implementing online courses.

It is important to note that not all the suggestions in these guidelines will be applicable in all cases. The focus is to challenge everything that is sometimes done automatically. It is a matter of incorporating a gender and diversity perspective and sensitivity to make learning products more effective and closer to the people who use them.



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It also shows concrete examples of incorporating these standards in the courses' analysis, design, production, implementation, and evaluation.

The content is structured according to the phases of the ADDIE model, previously mentioned: Design, Production, Implementation, and Evaluation.

1. STANDARDS OVERVIEW

The standards shared in this document should help course development teams assess the extent to which they have integrated gender and diversity perspectives into each process. Checklists are also provided to develop self-assessment at the end of each phase.

Each institution and each course are different. So, the standards have been developed to be applied to any context and are easy to understand and measure.



Table 1: Diversity and gender standards in each of the phases of course development

PHASE	STANDAR
Needs assessment	The learning needs assessment incorporates enough elements of gender and diversity to develop a product that respects international gender and diversity policies.
Instructional design	The instructional design of the courses reflects the diversity of the audience and does not incorporate elements of negative impact on gender and diversity issues.
Production	The course learning resources have been developed and designed incorporating gender and diversity dimensions.
Implementation	Courses are facilitated or taught from start to end, respecting the gender and cultural diversity of the participants.
Evaluation	The data collection and analysis instruments for course evaluation incorporate gender and diversity dimensions.

2. NEEDS ASSESSMENT

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2.1 General Guidelines

It is crucial to consider the course audience and the diversity issues, including gender, during online course planning because these aspects can affect all initial decisions.

The team should think about what is being asked, who is asking and to whom. It is important to note how these questions are articulated, both from the point of view of language and the implicit messages that questions may hide. We should also consider who will answer these questions and from where.

The documents generated in this first phase should incorporate elements of gender and diversity to help the team enhance its vision and seek the necessary information in the subsequent design and development of the course. The needs assessment is the most crucial phase of the process. Suppose the right questions are not asked, and the principles of gender and diversity are not questioned from the beginning. In that case, it becomes more complicated to include these perspectives in the following phases.

In conclusion, **if gender and diversity questions are not asked initially, it will be more challenging to ensure that the training products reduce gender equality and diversity knowledge gaps.** Nor will it be possible to collect data, evidence, or generate knowledge on these topics.

2. 2 Needs assessment standard

The learning needs assessment incorporates enough elements of gender and diversity to develop a product that respects international gender and diversity policies.

2.3 Guidelines to be considered in this phase

- When the client shows interest in developing a training proposal, the gender and diversity approach to be used should be shared.
- It is advisable to include people on the team with experience working on gender or diversity topics or projects. It is important to analyze who is on the team and what biases may limit the gender and diversity analysis and minimize them.
- The standards in this document should be applied when guiding the client through the assessment of needs phase.

2.4 Special Suggestions for Including Gender and Diversity Aspects in this phase

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The needs assessment phase can identify the learning solution's critical elements that need to be developed: The business problem to be solved through training, the course audience, etc. Thus, it is a vital stage in the course development process, as it lays the foundation for all subsequent processes, especially for the course design.

The right questions should be asked from the beginning to ensure that gender and diversity guidelines are included.

Identify the problem to be solved through learningg

The needs assessment usually begins with the question about the problem to be solved. Since Inter-American Development Bank is an international organization working on development topics, we focus on the economic and social development issues that the courses will help improve. However, it should always be kept in mind that the problem has many faces as a prism. Therefore, the focus of analyzing a problem should be broadened and not take the target population as an abstract "whole." Instead, trying to see how the same problem affects each human group differently. For example, suppose the course is about climate change. In that case, there are bound to be very different impacts for indigenous or Afro-descendant populations, and the analysis must consider these variables. Usually, no problem affects men and women differently due to their roles in each society, so it is crucial to delve into these aspects during the analysis.

This perspective is equally applicable to corporate training. For example:



- **1. Problem:** A food company has reputational problems because customers feel its quality is worse than its direct competitor.
- **2. Objective:** Improve the image of the quality of this company's products.
- **3. Solution:** Offer training to the marketing staff to design campaigns to improve its prestige. By designing the course, the trainers must consider clientele diversity and needs and conditions. They should ask themselves, for example, if this perception of food quality changes according to the type of customer of the company; if age, gender, or whether they live in rural or urban areas affect the image of the product. In addition, it must be considered who makes the final decision in purchasing the product within households and who influences that decision the most.



to the type of customer of the company; if age, gender, or whether they live in rural or urban areas affect the image of the product. In addition, it must be considered who makes the final decision in purchasing the product within households and who influences that decision the most.

Another question should be if courses align with the organization's priorities, as companies have business models and strategic plans.

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In these cases, we can take the needs assessment further and ask ourselves, what does the business objective contribute to gender equality and equity, or respect and promote diversity? Would this objective have the potential to achieve positive impacts on equality, equity, and diversity? These aspects must be considered when designing a learning intervention. For example, at the Inter-American Development Bank, the development of courses is based on specific framework documents and aligned to strategic policies.

Also important to consider whether a learning solution will help improve the situation or whether other interventions are more effective. For example, in the case of the food company, it may be more effective to hire an experienced external company to do the campaign rather than train its employees. However, it may be beneficial to train communicators on quality issues in the long term, and consumers need to design better future campaigns.

It would help if you also thought about how the course could improve or worsen the gender or diversity gap, minimize adverse effects, and maximize the positive ones. Failure to ask these questions can lead to design mistakes, increasing inequality, or reinforcing stereotypes.

For example, giving leadership training to female managers of a company can help to improve the positioning of these women in the corporate structure. However, on the other hand, it may leave out the potential of other women from different positions at that company.

Another critical issue is how to measure whether the learning intervention is successful, i.e.,

whether it contributes to solving or improving the identified problem. In this case, it should be considered whether baselines help build indicators disaggregated by gender, age, and race.

In conclusion, it is important to ask questions at each step to help broaden the analysis and reduce biases. Some of these questions may not be answered, or the answer will be "no, it is not necessary,"; but working with a gender and diversity approach often means asking the question and avoiding attitudes of "we have always done it this way." Demonstrating that we ask ourselves diverse questions related to gender and diversity is already sensitive to these issues.

Define the course audience

Furthermore, define who is the audience of the course. The better you know your audience, the better you will be able to meet their learning needs. Again, different paths can be followed to determine the course audience.



For example, you can define who will have the most significant impact on the desired change or know in advance who needs to change a particular practice at work. For example, if the problem is to improve citizen service in the municipalities, those who provide citizen service at the municipal level should be trained. However, sometimes the answer is more complex because many actors influence the solution to a problem. Therefore, a good practice is to define primary and secondary audiences within a course.

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Designing courses with sensitivity to gender and diversity issues begins by opening our eyes when analyzing a problem, and frequently checking on opportunities that the topic, contents, methodology, and instruments are offering that can be put at the service of the course to build equity and eliminate stereotypes and

Many e-learning methodologies simplify when defining the audience, such as using the Learner Persona (Torrance Learning, n.d.) because it dramatically facilitates the course design process. However, the authors of these guidelines invite to assume from the beginning the complexity of the audiences and suggest that, if you want to use this type of tool, you should define several profiles that represent the most relevant audiences.

Likewise, new questions should be included in defining the audience to help understand it better, from the point of view of gender and diversity: Is the audience predominantly male, female or is there parity? Do all people play the same role? What are the ethnic or age differences that we may encounter? Is there cultural diversity in our audience, or do they all belong to the same culture? Finally, check whether the learning solution is continuously adapting to the different audience needs.



The initial definition of the learning objectives

Another fundamental topic is to define the knowledge that the audience should acquire or the behavior that should change as a result of the training. It is necessary to analyze what the participants should know or do once the course is over. Nevertheless, in this case, it is also required to ask whether there is any knowledge related to gender, equity, or equality topics that should be included in the course contents. The team should define if the audience should acquire relevant knowledge about diversity. It should be asked how the course can change discrimination, intolerance, or biased attitudes with expertise. Changing attitudes is as necessary as acquiring knowledge for the training to impact the problem to be solved positively.

2.5 Initiation of the e-Learning Project. "Project Charter" Document

According to the methodology used at the IDB, creating a new course represents an e-learning project. Within the methodology of the Project Management Institute (PMI), one of the first tools to be used at the beginning of the project is the Project Charter, where the existence of the project is formally authorized, budget is assigned, deadlines set, and the project team is defined (Brown, 2005).

It is important that the Project Charter also considers gender and diversity aspects, such as who will carry out the project, if different origins and ages are represented, or if the authority is well distributed between men and women. This ensures that the team is as diverse and representative as possible. If the team members do not know about gender and diversity issues, including a specialist in these topics should be considered.

Some sections of the Project Charter, such as the business case, purpose, or objectives, are already defined before the needs assessment. Remember to include relevant aspects related to gender and diversity that have appeared during the needs assessment.

The definition of the e-learning scope is based on each module or unit's course structure and expected products. Here it is necessary to put the spotlight back on gender and diversity aspects. The topics that contribute to gender equity and the wealth of knowledge and wisdom of indigenous or Afro-descendant peoples in various subjects should not be forgotten in the different modules.

On the other hand, when including project indicators, consider the possibility of having some related to gender or diversity. For example, in open courses, consider including estimates of how many women, people from diverse cultural or indigenous groups take the courses as measures of success in reaching less traditional audiences. Likewise, indicators can be included in science, technology, engineering, and mathematics (STEM) courses to increase the number of women participating.

3. INSTRUCTIONAL DESIGN

3.1 General Guidelines

During instructional design, the learning needs identified are transformed into learning objectives. The learning content and the formative and summative evaluations to approve are defined.

To achieve an instructional design with a gender and diversity approach, instructional designers and content experts (SME) must be aware of their own culture and avoid applying a bias during the design process, understanding each culture and its differences.

3.2 Instructional Design Standard

The instructional design of the courses reflects the diversity of the audience and does not incorporate elements of negative impact on gender and diversity issues.

3.3 Guidelines to Be Considered in this Phase

- Select experts and consultants who are trained at a basic level in gender and diversity topics or request the support of a specialist to advise the course team.
- Coordinate gender and diversity specialists to gather good practices that can be used as course content.
- Analyze the importance of working on a particular gender or diversity topic in the course content.
- Develop templates or scripts for frequent resources (welcome messages, syllabus, read me before you start, etc.) that are sensitive to gender and diversity. For example, you can use the language usage tips in the [inclusive language section](#) of this document.
- Before approving the training pathway, evaluate whether or not the topics set selected show situations and concepts that promote inequalities.

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*Designing for multicultural audiences.*⁴

In most cases, the audience at courses is diverse, even if they are developed for a well-known and limited audience. In open courses, the audience for the course is not known in advance. However, IDB MOOCs' data analysis of the characteristics shared by students shows a multicultural audience with a diverse origin, identity, education, and conception of life. The same can occur in many open courses and especially if they are massive. IDB MOOC's students

⁴ Developed in collaboration with Marie Antoinette Reid, Instructional Design Consultant at the Inter-American Development Bank.



come from diverse contexts, countries, and cultures, with varied conceptions of the world and the universe, so various points of view and cultural perspectives must be considered when designing them. Due to IDB's highly diverse audience, the authors have decided to include in the guidelines suggestions on working with a multicultural approach that can serve other institutions with similar particularities or have culturally diverse audiences.

Adopting a multicultural approach implies ensuring equal opportunities to participate in the course regardless of each student's race, ethnicity, language, religion, gender, cultural background, socio-cultural status, and sexual orientation. Furthermore, diverse cultural approaches are recommended to implement a course about the same topic and be impartial towards those approaches (Yilmaz, 2016). For example, if the subject to be discussed is cosmology or the representation of mother earth for some indigenous people, it should

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be treated as seriously as a topic on climate change and its effects, without misjudging or downplaying other worldviews.

One strategy that can be followed is to emphasize multiple historical perspectives, strengthen intercultural awareness, and reduce prejudice and all forms of discrimination. Instead of promoting only one way of thinking and one way of life with which a cultural group identifies, the global vision of multicultural Education seeks to promote respect and appreciation for diverse cultures by strengthening cultural awareness and recognizing intercultural dependence (Ameny-Dixon, 2008).

Several authors have suggested alternatives to traditional Instructional Design System (ISD) models to consider cultural diversity better. For example, Thomas, Mitchell, and Joseph (Thomas, 2002) suggest adding a "third dimension" to the traditional ADDIE process (analysis, design, development, implementation, and evaluation). That includes widespread questioning to ensure that designers remain culturally sensitive, including interaction with target audiences to understand better their needs and preferences and introspection about personal beliefs and attitudes toward other cultures (Parrish, 2010).

On the other hand, Edmundson (2007) offers a new model called CAP (Cultural Adaptation Process) that proposes an expansion of the needs assessment and analysis phases of the traditional instructional design model (part of the "A" of ADDIE) (Parrish, 2010).

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Likewise of interest is the AMOEBA model (Gunawardena, 2014) that suggests a highly participatory role for students in course decisions, which includes making decisions, when feasible, regarding the language used, interface formats, communication channels, and instructional activities and methods (Parrish, 2010). This is a complicated online learning environment, but surveys and other tools can be used to gain more information about the cultural diversity of audiences and use that information in both course design and implementation.

Finally, we come to CBM, which considers culture throughout the instructional development process (Young, 2008). CBM is a framework developed for culturally responsive instructional design activities. This model uses questions to help maintain audience-centered focus throughout the process. It also includes recommendations on project management and the roles and skills required of the design team, as do these guidelines. It also proposes ways to achieve student-centered learning outcomes and to include cultural factors in the design process (Parrish, 2010).

The unifying message among the research, as mentioned earlier, is not that all cultural expressions can be addressed in course design but rather to ensure that course design is approached with a "culturally sensitive mindset." That is, to be aware that culture shapes the way people interact, communicate, and think and, in turn, the need to make an effort to promote the inclusion of cultural diversity in courses. In addition, this can guide people working in diverse teaching and learning environments toward achieving the principles of Universal Design for Learning (UDL).

UDL refers to the general themes of 1. Engagement: Stimulating interest and motivation to learn, 2. Representation: Presenting information and content to learners in different ways, and



3. Action and expression: Differentiate how learners express their knowledge (Arduini, 2020, p. 94). These dimensions go hand in hand with designing for multicultural audiences. The UDL framework guides educational practice that: "(a) gives flexibility in the ways information is presented, in the ways students react to or demonstrate their knowledge and skills. In the ways students are motivated and engaged with their learning; (b) reduces barriers in Education, provides appropriate accommodations, supports, and challenges, and maintains high expectations of achievement for all students" (Arduini, 2020, p. 92).

Cultural sensitivity and awareness must first begin with the instructional designer and should be addressed as another important area tied to e-learning design best practices; the instructional designer must be a constant driver of multicultural focus throughout the project.

In short, there is extensive literature that can guide the course's instructional design team to effectively incorporate a multicultural approach when designing and conducting course content development. Therefore, the standards and criteria in these guidelines include a multicultural perspective and respect for the cultural diversity of the audience.

Defining the learning objectives

Based on the needs assessment, where the learner behaviors or skills that students should acquire or perform at the end of the training have been identified, the learning objectives will be outlined. Learning objectives must be measurable and precise and consist of a description of what the learner should be able to do, the conditions under which he/she will be able to perform this task, and the degree of achievement required (Mager, 1997).

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The learning objectives are defined in terms of knowledge, skills, and attitudes. They are written both at the general level of the course and at each module, unit, and activity. The alignment between the different levels' objectives is important to know if the activities and assessments contribute to developing the student's predefined skills and behaviors. For example, when



writing learning objectives to include gender and diversity aspects, it should be considered whether it is possible to include specific gender equality and diversity objectives when the topic allows it.

Most learning objectives will probably not reflect gender and diversity issues, but in some cases, they will. Some topics can be taught with or without gender and diversity sensitivity. Moreover, in this case, you should consider including these dimensions as much as possible.

In a MOOC on leadership and governance, aspects of indigenous rights, judicial system, or governance models can be considered part of the objectives. For example, factors linked to gender can be regarded as how female leadership is built and empowered.

It is necessary to identify the gaps or inequalities in the designed course's topic or sector. For example, suppose there are significant inequalities between men and women or between different social or ethnic groups. In that case, actions to help minimize these gaps should be included in the learning objectives. For example, a course on promoting foreign trade should consider how the course can help to include women or rural populations in this type of trade. An example of an objective could be: "To identify the opportunities that foreign trade offers to rural and/or women-led small and medium-sized enterprises, based on an analysis of the main elements and tools of a country's trade policy."



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Likewise, when writing the learning objectives, it is essential to pay attention to inclusive language. Similarly, formulas that promote stereotypes should be avoided. For example, "At the end of the course, female students will be able to develop a video game in Unity 3D just like male students". Because in this objective, instead of promoting equality, it seems to suggest that women are less capable of developing video games than men, who are the ones who set the desired level. More appropriate wording of the objectives would be: "At the end of the course, both female and male students will be able to develop a video game in Unity 3D".

For guidance on writing in inclusive language, please refer to this document's [inclusive language section](#) of this document.

Defining the course content sequence, activities, and assessments

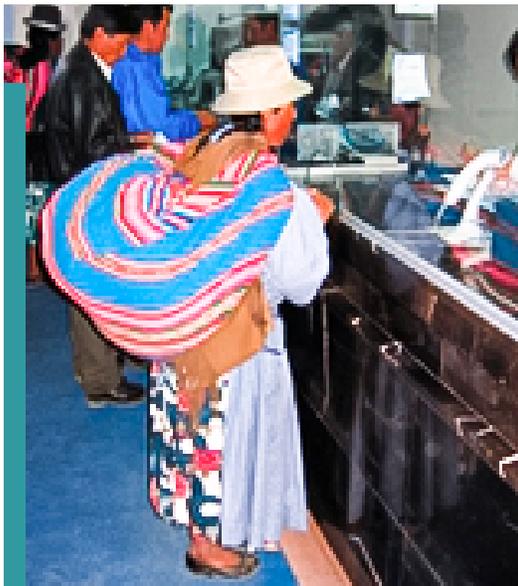
Once the learning objectives have been defined, it is necessary to analyze what material or content the students should learn and what activities to perform to develop the selected skills. The order of the content and exercises should be performed from the most general and/or simple to the most particular and/or complex. The sequence of contents and activities is crucial for the student to acquire knowledge and skills logically and sequentially. For example, if you want a child to learn to multiply, they must first learn numbers, count, add, and finally multiply.

Although some people could learn to multiply without the initial steps, following this learning sequence is most often necessary. It is important to include only the content that learners need to meet the learning objectives. The learning activities should facilitate that students learn by practicing, being well-aligned, and supporting the learning objectives. Finally, the evaluations should accurately measure whether the student acquired the defined knowledge or developed the desired skills and attitudes; in other words, they measure whether the student can perform what was described in the course learning objectives at the end of the training.

To mainstream gender and diversity perspectives in this process, when identifying the contents, it is necessary to check that resources that may have a negative impact on gender or diversity are not included; or promote the development of objectives and contents that are not sensitive to these issues. To apply multicultural and gender and inequality-sensitive education principles, the course design team and the subject matter experts must be aware of their own cultural biases and traits. Hofstede's cultural dimensions can be used for this purpose. While they were initially used to distinguish countries culturally, "Hofstede's work has been widely applied across disciplines, and it can be argued that the dimensions relate to very fundamental problems facing any human society" (Asino, 2017, p. S878). Reviewing the power distances in ones' society, the conception of gender, the predominance of individualism versus collectivism, the vision of the present and the future, as well as the methods of social control, helps to understand the individual starting point. It also contributes to the understanding that our beliefs are not the only way to interpret reality. The instructional team should understand how these dimensions differ in the courses' audience, think of contents and activities that show this diversity, and avoid presenting only the dominant culture.

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Using the concepts of *"need to know,"* content which the course audience must know to pass the course, and *"nice to know,"* content that is interesting but not necessary, the course



contents can be analyzed looking for those related to gender and diversity. For example, let us think of indigenous or afro-descendant populations. There is probably knowledge about their cosmivision that could be interesting to analyze: their conception of water, environment, landscape, soil, and its uses. It is important to consider how each content could contribute to modifying attitudes of discrimination, intolerance, etc. What is unknown is very difficult to respect, so changing attitudes requires prior knowledge about the diversity of views held by women and indigenous or Afro-descendant peoples. For example, suppose the course on climate change includes learning about the conception of the soil, the worldview, the uses that indigenous populations make of the territory. In that case, it will be easier to link an attitudinal change towards respect and understanding of these other realities that coexist.

Some guidelines that can be used when determining the content are:

- Consider women's different needs and priorities or people of diverse ethnic and socio-cultural backgrounds when developing content. In addition, it is vital to think about the multicultural appropriateness of such content.
- Include content that reflects how the topic affects different age groups. For example, the impact of the digital economy on people over 60 years of age, and more specifically on women in that age group.
- In courses on Latin America and the Caribbean, consider the peculiarities of the development with the identity of indigenous or Afro-descendant peoples and be able to incorporate these elements. For example, in courses related to the environment and, in general, in all those related to the development agenda. See [Annex A. Basic issues on gender and diversity](#) for more information.
- Incorporate content that helps change stereotypes⁵, not reinforce them. For example, content reinforces messages of support for ethnic minorities, their identity, traditions, etc.
- Include ancestral knowledge, traditions, and diverse cultural heritage in the contents, reflecting cultural sensitivity at identification.
- Include content that gives visibility and empowers ethnic minorities as well as women.

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Suppose it is decided to incorporate third-party content. In that case, it will also be necessary to check whether the documents chosen are sensitive to gender and diversity issues, whether they provide data disaggregated by gender and age, and whether the data reflect diverse realities or reinforce stereotypes. It is recommended to use documents with gender-inclusive language preferably.

When case studies are introduced, they should be developed with impacts differentiated by gender, ethnicity, etc., as long as the topic permits. It is recommended that they be cases that do not recurrently place women and indigenous or Afro-descendant women in a situation of vulnerability or weakness.

In any case, gender and diversity issues should be present in a cross-cutting manner in the different contents of the course.

Some questions that may arise to check that we have included gender and diversity issues in the sequence of contents and activities are:

- Have resources been adapted to make indigenous and Afro-descendant populations visible?
 - Review the stories used in the courses and the realities they reflect.

⁵ The Office of the United Nations High Commissioner for Human Rights has a section on gender stereotypes, what they are and recommendations for avoiding them. Available at: <http://www.ohchr.org/SP/Issues/Women/WRGS/Pages/GenderStereotypes.aspx>





- Have measures been included to compensate for possible exclusion factors? For example:
 - Include a diversity of stories for the same topic reflecting different realities.
- Have activities and resources been designed with the participation or opinion of indigenous or Afro-descendant people? For example:
 - Some interviews can be conducted beforehand in the analysis phase.
 - People of that origin can be included in the course team to help understand some peculiarities of their peoples to reflect it in the contents better.

4. PRODUCTION

4.1 General Guidelines

The stage in which course contents and activities are transformed into learning resources is called production. The most common online courses' resources are videos, animated videos, readings, practical exercises, essays, simulations, and quizzes, but many more. Whether developed internally or contracted to external providers, best practices in gender and diversity issues should be applied when these learning resources and mitigation and reduction measures for potential biases should be implemented.

A style review should be included in each resource to ensure inclusive and culturally sensitive language.

Standard related to production

The course learning resources have been developed and designed incorporating the gender and diversity dimensions.

Guidelines to consider in this phase

- Include in the contracts of external suppliers' conditions regarding incorporating gender and diversity issues in the products.
- Identify and use suppliers from different backgrounds who can provide diverse perspectives.
- Train the multimedia team on gender and diversity issues.
- Ideally, those involved in the thematic and style review should have basic gender training.
- Identify gender and/or diversity focal points among SMEs and integrate them into the production team.



4.2 The Development of Learning Resources with a Gender and Diversity Perspective

This section offers recommendations for considering gender and diversity issues in different learning resources to be developed for the course. In general terms, these questions should be asked based on the information gathered from the needs analysis

Go back and see what had been defined, the audience's particularities, the problem to be solved, and how gender and diversity came into play in each of these aspects. In this way, inclusive and respectful learning resources can be developed.

Some of the questions to be asked are:

- Are resources adapted to facilitate access for indigenous people or people of African descent? For example:

- Adjustment of formats used and weight of documents taking into account internet access and bandwidth in certain areas. In this way, downloading the material and access to the online course can be facilitated.
- Before publishing, have the learning resources been verified to be inclusive regarding people and cases addressed and avoid stereotypes? For example:
 - Who is starring in the images, doing what?
 - Discourse analysis: Who says what? For example, every time a woman appears, does she accompany or complement the important things a man says?
 - Visibility and empowerment of women, Afro-descendants, or indigenous people in the materials. Avoid making biased associations in statements or images, such as associating Afro-descendant populations with poverty.

Below, a series of elements for each activity type are proposed to help the team design them with a gender and diversity approach.

4.2.1 Readings and Presentations

The main recommendations when preparing presentations and texts regarding gender and diversity perspectives are the following:

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- Ask yourself what language is used and how the materials are written.
 - Gender and diversity inclusive language should be used.
 - Avoid only speaking to a male or female audience and try using inclusive terms, for example, instead of using "Mankind" when it could be used "humanity" or "Humankind."
 - [Inclusive language](#) guidelines will be further provided.
- See if those who write the materials have a gender and diversity perspective. Specific guidelines should be provided so that these people can develop materials in line with the gender and diversity guidelines, such as, for example:
 - A balance between men and women;
 - Representation of people from diverse backgrounds or cultures, such as Afro-descendants and indigenous people;
 - Diverse voices in terms of age, race, culture, and geography. It is important to show the diversity of the topic for different populations and how it affects each group differently.
 - Avoid generalizations in content, such as treating a region as a whole or not mentioning specific populations, such as indigenous peoples, who may be more affected by the issues addressed, as in the areas of water resources or the law.
 - Avoid reinforcing traditional roles or perpetuating stereotypes. For example, avoid mentions linked to the conventional roles of men and women, such as talking about the crucial role of women in promoting the excellent use and selection of food in the home. See [ANNEX A. BASIC ISSUES ON GENDER AND DIVERSITY](#) for more information.

- Obtain graphs that represent the problem from different realities, with disaggregated data. Include gender and diversity elements in the tables.
- When images are included in the readings, avoid stereotypes, use images with people of diverse origin in positions of responsibility or women in scientific topics. For more information on the inclusive use of images in videos, consult the [checklist for using images](#).

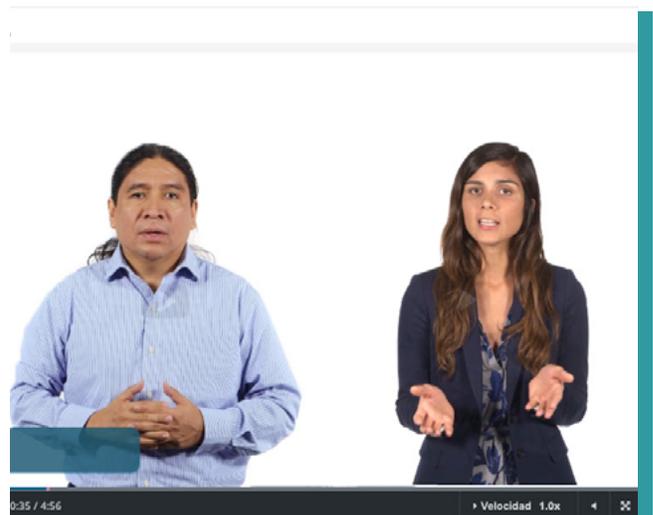
4.2.2 Videos

Videos are a very common resource in online courses. When creating a video, it is important to consider the content, the person explaining it, and the supporting images. The main recommendations for the elaboration of inclusive videos are:

- It is necessary to determine who is in them and what this represents.
 - Is there a balance of gender, nationalities, different ethnic backgrounds? For example, male and female presenters should be included and people from diverse backgrounds.?
- It is necessary to be careful who says what and not always put the male expert and women in the introductions. This can contribute to reinforcing stereotypes or transmitting messages of equality and change. Ensure the balance of all the people who participate in the same video to have the same level of participation and the same relevance.
- If filming on location, offer diverse images that reflect the multiculturalism of the region. Consult the [recommendations for filming with a gender and diversity approach](#).
- If archival images are used, avoid stereotypes and use images with people of diverse origins in positions of responsibility or women in scientific subjects. For more information on the inclusive use of images in videos, consult the [checklists for using images](#).
- Obtain graphics that represent the problem from different realities, with disaggregated data. Include gender and diversity elements in the tables.
- It is advisable to develop a procedure for reviewing scripts and on-camera talent to check for gender inclusion and avoid stereotypes and biased tendencies.

4.2.3 Animated Videos

As in videos, great care must be taken with the characters represented and their speeches and the practices shown



not to reinforce gender, ethnic, or age stereotypes. The main recommendations for producing animated videos are:

a) Analyze which figures we use, whether cultural interpretations fit, or whether abstract or one-dimensional images are recognized. Keep in mind that not all cultures have the same understanding of images.

b) Use diverse characters with a balanced performance.

4.2.4 Forums or Chat Rooms

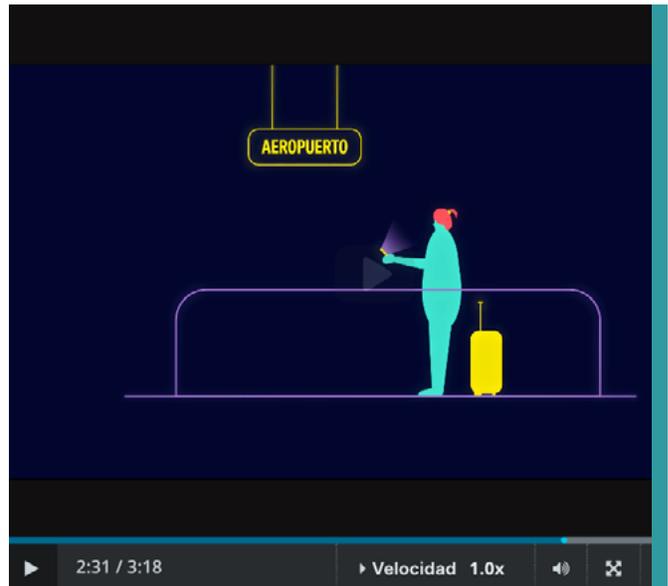
When developing activities in discussion forums or chat rooms, it is recommended that the following be taken into account:

a) Develop questions and use examples that do not judge or pigeonhole women into traditional or stereotypical roles.

b) Offer female participants the possibility of sharing their experiences and concerns without facing possible dominating attitudes of male colleagues, as sometimes happens in face-to-face courses.

c) If it is not strictly necessary, the participants' names, ages, marital status, and gender should not be revealed. In this way, more open opportunities for exchange and participation are offered to members who come from societies with limitations or restrictions. The aim is for everyone to be able to interact without prejudice or misunderstanding. An example of good practice is that, on the platform, participants can choose neutral nicknames and not show their gender in their profile.

d) It is necessary to review the rules of etiquette to regulate behavior among participants and see what responds to gender and diversity criteria.





4.2.5 Teamwork Activities

Teamwork activities must include netiquette's rules that incorporate a gender and diversity perspective within the team's interaction. In addition, the following must be taken into account in these activities:

- a) If mixed groups are formed and an *instructor-paced* or tutored course, specific rules must be established, and care must be taken to ensure equitable participation. Detect in advance strong attitudes or excessive limelight, open opportunities for everyone to contribute, monitor what is said and who says it, and encourage the use of the platform's *red flags* to denounce situations that violate free and respectful participation within the team.
- b) Allow the audience to self-form the groups and let each participant work as he/she feels most comfortable while respecting the cultural peculiarities of each participant.

4.2.6 Synchronous, Live, or Virtual Activities

Synchronous, live or virtual activities involve events where the teacher or tutors interact in a live session with the students and a specific timetable. It is required to carry out these activities correctly from the point of view of gender and diversity:

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- a) Choosing a diversity of experts, men, women, from different backgrounds within the teaching staff.
- b) Organize the activity to favor diverse audiences. For instance, consider a schedule that does not impede women or other people with various responsibilities from participating.
- c) If there is interaction, the person facilitating the session should pay attention to participation, who takes the floor, if there are rounds of questions, offer possibilities to varied participants.

4.2.7 General Recommendations for Inclusive Language in Course's Materials and Learning Resources

Language correlates with the symbolic order of social life. When speaking or writing, words are transformed into representations and these, into a collective imagination. Learning to name people and things in the environment through language involves prejudices, shades of discrimination, and arbitrary attributions that pigeonhole what is being called. Sexist language resorts to gender stereotypes and thus fosters discrimination.

Promoting gender equality and non-discrimination requires relearning language to banish sexism from the contents used in communication.



Table 2. Examples of inclusive language (UNITED NATIONS, n.d.)⁶

CONTEXT	LESS INCLUSIVE	MORE INCLUSIVE
Forms of address	“Professor Smith (surname and title for a man) and Madeline (first name for a woman) will attend the luncheon.”	“Professor Smith and Professor Jones will attend the luncheon (surname and title for both).”
Avoid gender-biased expressions or expressions that reinforce gender stereotypes	“Guests are cordially invited to attend with their wives.”	“Guests are cordially invited to attend with their partners.”
Make gender visible when it is relevant for communication	“Children should attend the first cooking class with their parents.”	“Boys and girls should attend the first cooking class with their parents.”
Use gender-neutral words	“Man-made”	“Artificial”; “human-caused”
Use the pronoun one/ who	“A staff member in Antarctica earns less than he would in New York.”	“A staff member in Antarctica earns less than one in New York.”
Use a plural antecedent	“A substitute judge must certify that he has familiarized himself with the record of the proceedings.”	“Substitute judges must certify that they have familiarized themselves with the record of the proceedings.”
Omit the gendered word	“Requests the Emergency Relief Coordinator to continue his/her efforts to strengthen the coordination of humanitarian assistance.”	“Requests the Emergency Relief Coordinator to continue efforts to strengthen the coordination of humanitarian assistance.”
Use the passive voice	“The author of a communication must have direct and reliable evidence of the situation he is describing.”	“The author of a communication must have direct and reliable evidence of the situation being described.”

⁶ As the original guidelines were written in Spanish, this section could not be entirely translated. The examples or inclusive language in English are extracted from the United Nations Website.

4.2.8 Recommendations for Filming with a Gender and Diversity Approach

Images are symbolic mechanisms for representing reality and have great power to construct the collective imaginary. Therefore, broadening, diversifying, and making the visual representation of women more complex and avoiding over-dimensioning violence is important to put an end to messages that contribute to reproducing gender stereotypes (UNRWA), 2017, p. 81; likewise, opening our eyes to people of indigenous peoples and afro-descendants contributes to their integration into life, normalizing their presence and eliminating ideas of exoticism or stereotypes.

In information, images have a compelling communicative force, and students tend to equate images with "objective reality." It is, therefore, necessary to reflect on the risks of the images used (United Nations Refugee Agency for Palestine Refugees (UNRWA), 2017, p. 81);

Here are some recommendations when taking photographs or recording videos so that the result is inclusive and respectful of diversity:

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TASK	PURPOSE	GUIDELINE
Reflect the context	<p>Seek locations where women are protagonists and remember: not only in domestic spaces!</p> <p>Look for scenes where indigenous and Afro-descendant people have access to and control of resources.</p>	<p>Take shots of the primary sources accompanying the project. Ask permission to film in places where they work or carry out the main activity for which they will be interviewed (United Nations Refugee Agency for Palestine Refugees (UNRWA), 2017, p. 81).</p> <p>Try to avoid folklore, exotic ideas linked to these peoples. Instead, reproduce images where they handle resources, such as computers, or making decisions.</p>
Explain the issue	<p>Portray the problem by filming consequences that reflect the differentiated impact.</p>	<p>The photographer must take images of the places and conflicts indicated by women and take pictures when women are present.</p> <p>In the same way, treat people of indigenous peoples or Afro-descendants.</p>
Explain the cause	<p>Search archival images</p>	<p>Ask the women and indigenous or Afro-descendant people you interview to provide you with archival images.</p>
Providing egalitarian images	<p>Avoid gender or origin asymmetries in the graphic representation.</p>	<p>Use similar angles when photographing or filming men and women. The tendency is to avoid using a low angle for men (they look taller) and a high angle for women (they may look small or less important). When asking a woman to pose, ask yourself if you would suggest that pose to a man.</p> <p>Check once again who is going out and what they are doing.</p>



4.2.9 Checklist to Use Third-Party Images

When you need to use third-party photos, you also need to be careful about which photos you select. Many image acquisition platforms show the diversity in the United States but are sometimes poorly applicable to other cultural contexts.

Some questions that can guidelines image selection include the following United Nations Refugee Agency for Palestine Refugees (UNRWA), 2017:

- Does this photo or shot tell the story I want to tell, or should I use a more appropriate photograph?
- What is the motivation for publishing the photo or video?
- What are the possible consequences of using this photo; will people see themselves reflected, or might they offend specific populations?
- How would you react if you were in the photo?
- Is there an alternative way to present the information if you cannot find suitable images to continue telling the story?
- When choosing photographs of women, indigenous peoples, or Afro-descendants, would the photograph communicate the same concept if the protagonist were a white man? The so-called "reversal rule" is helpful in these cases: swap the woman or indigenous or Afro-descendant person you will photograph for a white man. What result do you get? Do you still think that shot is vital because it provides contextual information? Would you shoot him in the same way?

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Here are some examples of using images that are not appropriate from the standpoint of respecting gender and diversity:

a) A video about agriculture and eating habits has the following images. What do they suggest? What would they mean?

Illustration 1. Images used in an IDB online course



When analyzing the images, it is observed that almost all of them leave women in the reproductive role (they buy and cook) but reserve the productive role for men (they grow crops, work in greenhouses, are field technicians).



b) Another example related to both gender roles and the presentation of diversity is the following. What do these images communicate to us?

Illustration 2. Images used in an IDB online course.



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It seems to represent that the (white) men make the decisions (photo of the meeting table), and the indigenous women preserve the traditions (photo of the typical Surinamese costumes).

c) In another video of science and technology in Latin America, we find these images:

Illustration 3. Images used in an IDB online course.



While we see the presence of women in science here, who are absent? What ethnicity are the people running the technology? They are all people who could be identified as white. The team should include pictures or images showing the diversity of the audience..

d) A video on healthy living reflects this image:

This is a very particular way of understanding how to lead an active and healthy life in western countries and cities. So, the question that arises would be, for example, if the indigenous people feel reflected in the message, could we think of putting several images with different meanings of what it is to lead a healthy life?



Illustration 4. Image used in an IDB online course.

e) Gender stereotypes or lack of diversity can also be represented in animated videos. For example, in a video that talks about the scarcity of water on planet earth, the following images are shown.

Illustration 5. Images used in an IDB online course



We are 7,000 million individuals on planet earth

One person consumes 1,000 cubic meters per year

We would have enough to live for 10,000 years

In all these images, humanity is only represented by adult men. No women are shown, nor are figures of different sizes, including children, the elderly, and people with disabilities. However, all these other people are also affected by the use and consumption of water on planet earth.

Designing and producing courses with sensitivity to gender and diversity issues begins by opening our eyes at the moment of analyzing the problem and from there asking ourselves questions at every moment of the opportunities offered by the subject, the contents, and the methodology of the course to build equity and eliminate stereotypes and discriminations.



5. IMPLEMENTATION

5.1 General Guidelines

Implementation is the phase where the students are doing the course, but it also includes the course preparation processes on the platform. Depending on the type of course, participants may or may not interact with the course team or with other students. Again, depending on the training, the tools will have to be adapted to respect the gender and diversity guidelines.

From the beginning to the end of the course, the gender perspective must be monitored and maintained, and the diversity of the audience must be respected.

It is necessary to know which people access the courses, whether they are part of the traditional audience or not, and what implications this may entail, mainly in instructor-paced or faculty-led courses.

There is not much possibility to influence during implementation in self-guided courses, and special attention must be paid to the previous phases to ensure gender and diversity elements. Such as in the specifications on the use of the platform or the netiquette be respected during the course. In this type of self-paced course, care must be taken with the technical support for problem-solving. It is important to maintain an inclusive language, a highly respectful treatment, and not incur stereotypes or discrimination.

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For courses with tutoring or with people moderating the forums, a series of specific tips and recommendations are given in [Section 5.2](#).

Implementation standard

Courses are facilitated or taught from start to end, respecting the gender and cultural diversity of the participants.

Guidelines to consider in this phase

- Value gender and diversity criteria when selecting tutors (age, gender, origin).
- Avoid reinforcing roles and stereotypes when selecting tutors — for example, women in education courses and men in economics courses.
- Develop examples of messages appropriate to gender and diversity.
- If possible, offer alternatives to people with problems of access to technology (rural areas, the elderly, etc.).

5.2 Guidelines for Online Tutors

Tutors should be aware that inequalities, discrimination, and stereotypes related to gender, indigenous peoples, or people of African descent that exist outside the virtual world are very likely to be reproduced in the virtual environment.

The following recommendations help teachers take gender and diversity perspectives in their preparation and interaction with participants.

5.2.1 Before Starting the Course

Tutors must be the first to step outside their own cultures and temporarily remain neutral in understanding the students' diverse cultures. This is a mutual accommodation for unified communication and safe learning relationships.

Be aware of possible gender biases that may arise during training. For example, in courses designed without gender and diversity guidelines, texts or images may deepen differences, discriminate, or make some groups invisible because of their gender or origin. Therefore, the contents, examples, activities, and metaphors to be used must be well known and reviewed to avoid perpetuating or creating gender bias, discrimination, or inequalities.

When proposing activities at specific times, care must be taken not to leave out women who, due to their role in society, often linked to the family, cannot attend the course activities at that precise moment. A possible solution would be to propose two different schedules or agree on the group's agenda.

Whenever possible, it is recommended to prepare discussions on other cultures. For example, in courses with an audience from Latin America and the Caribbean, include indigenous or Afro-descendant topics regarding their knowledge, culture, and identity, and share contributions that they can make to the course theme from their reality.

It is vital to write rules of etiquette (netiquette) that include good gender and diversity practices to regulate behavior in the virtual classroom, discussion forums, and group work. Ensure they have inclusive language, help students avoid stereotypes and biases, and facilitate equal participation in the course.



5.2.2 How to Interact During the Course

When interacting with participants, avoid making assumptions based on gender or culture and not generalize according to their behaviors, abilities, or learning methods. Likewise, participants should not be treated stereotypically or differently based on their gender, age, or origin and should be based exclusively on their different learning needs.

The critical point is to consider the different cultural styles of communication that your participants may have. For example, people with an explicit intellectual type will work better with written text. Still, other people will have more difficulty conveying written messages if they need context and body language. Other examples can be derived from the difference between having a *linear mindset (in Western cultures)* or *circular mindset (of many Latin American indigenous peoples)* and, therefore, the type of activities that can be more easily understood depending on the culture.

Tutors should ensure that all participants have equal opportunities and freedoms to contribute and comment. To this end, various activities (individual, group, small teams) should be proposed so that each participant can find his or her place. It is also recommended to use private messages to inquire about the causes of low participation by specific individuals; a maximum number of interventions can be agreed upon so that the most vocal participants leave room for those who find it more challenging to express themselves.

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If *peer-to-peer* activities are used, the course tutor should be alert to possible gender bias or discrimination, for example, in *peer rating*. One way to do this is not to show the colleague's name being evaluated, mitigating this possibility. However, participants can also be asked not to include their names in the documents produced. In any case, the tutor should read the papers and check the marks given to detect any problems in this regard in time.

Teachers should be sufficiently trained to receive and resolve complaints regarding gender bias or the learning environment. In addition, they should encourage participants of both genders and diverse backgrounds and abilities to undertake technical tasks, take on leadership roles and provide role models.

Above all, any abusive, sexist or racist behavior among participants should be prevented and not tolerated.



6. EVALUATION

6.1 General Guidelines

The course evaluation is essential to know if the training has been successful, if people have learned what was specified in the learning objectives, acquired the defined skills, and were satisfied with the course.

The IDB uses the Kirkpatrick evaluation model. Level 1 measures participant satisfaction, level 2 measures the acquisition of knowledge and skills, level 3 measures the behavior change, and level 4 measures the results of applying the knowledge acquired (Kirkpatrick Partners, n.d.). The gender and diversity perspective can be included in each of these levels, especially in surveys used to obtain the information, mainly level 1. In addition, an initial survey is conducted to understand who our audience is and what their intention is in taking the course, to understand their needs and motivations.

In addition to the data usually extracted thanks to the different evaluation moments, it is necessary to consider what other dimensions should be analyzed in the courses that influence gender and diversity, beyond numbers and percentages of men and women registered.

Although it may be helpful to consult bibliography and tools on gender mainstreaming in courses, it should be borne in mind that these tools are designed for courses on gender. The purpose of these guidelines is to enable those who use them to carry out gender mainstreaming regardless of their course topic.

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Standard related to evaluation

The data collection and analysis instruments for course evaluation incorporate gender and diversity dimensions.

Guidelines to consider in this phase

- The people in charge of the analysis should have some basic training in gender and diversity to conclude the questions incorporated in this regard.
- It is not necessary to overload surveys. In some cases, the same questions should be asked differently, and in others, it will be required to include new complementary questions to deepen the analysis later.

6.2 Initial Survey

At the Inter-American Development Bank, a survey is included at the beginning of the courses with questions to know the students better. The survey results help understand better who the audience is and what their needs are.



The survey includes demographic parameters (age, gender, level of studies, sector of activity...) and questions about the interest in taking the course and the person's final objectives.

Gender and diversity perspectives may or may not be included in all these questions. Therefore, it is essential to have people with expertise in the subject matter to formulate them.

For example, when asking about gender, you can leave an open-ended question for the person to describe themselves: "My gender is best represented by the term... [text box]".

This option allows the person to self-define, but it can also be a challenge when analyzing the results since you have to create the most representative categories for the whole sample. Another possibility is to leave a list of options such as the one proposed by The Fenway Institute:

Gender Identity: Do you consider yourself? (Check one.):

- 1) Male
- 2) Female
- 3) Transgender male/ Transgender male/ Female to male (FTM)
- 4) Transgender woman/ Trans woman/ Male to female (MTF)
- 5) Gender non-conforming (genderqueer), neither male nor female exclusively.
- 6) Additional gender category/ (or other), please specify:
- 7) I prefer not to answer.

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Regarding diversity issues, there are also several ways to collect this information. First, people may feel that they belong to one or several groups, and we must collect this information to understand better the audience of the course and, in addition, to be able to treat the data from a diverse perspective.

There are several variables to group people's self-identification to specific groups, such as the language spoken (including native language, indigenous language, or mother tongue); by belonging to a particular ethnic group or indigenous people; by culture, customs and ancestors.

Self-identification is a right enshrined in national legislation in several Latin American and Caribbean countries, as in Ecuador and Argentina. However, the problem with the official categories used by States and their institutions is that they sometimes contribute to delimiting ethnic divisions and social boundaries that certain groups may not readily accept.

ECLAC in Annex 3 of "Indigenous Peoples in Latin America" offers a list of indigenous peoples that could be used in courses with an audience from that region. Similar lists should be sought to reflect the possible diversity of the course's student body in other parts of the world.

Another option, as was the case with gender, is to provide a list of possibilities about people's origin so that they can choose the one with which they most identify:

Which ethnic origin do you most identify with?

- African or African descent
- Asian or Asian descent
- European or European descent
- Middle Eastern or North African descent
- Indigenous or descendants of indigenous or ancestral peoples
- Mix

You can also simply look for options that fit the reality of your organization. For example, the IDB policies and action plans are aimed primarily at Afro-descendant populations and indigenous peoples. To see if the courses are being taken advantage of by these populations, you can ask in the survey:

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Do you identify yourself as Afro-descendant?

Do you identify with an Indigenous or ancestral people? Please specify.



As for the part of the survey that seeks to learn more about the intentions for taking the course or the objectives of the student body, it is conceivable that there are also topics related to gender or diversity issues.

For example, suppose the online course has synchronous activities with a specific date and time. In that case, questions could be included to inquire about the participants' time availability to take the course and possible impediments or challenges. This information will be of great help when

scheduling the course's overall times, selecting synchronous activities schedules to prevent them from occurring when there are people who could not participate.

6.3 Survey of Satisfaction: Level 1

The satisfaction survey is conducted at the end of the course and corresponds to level 1 of Kirkpatrick's evaluation model. It is used to evaluate whether the people who took the course are satisfied with the training quality and content and whether it responded to their training needs. The IDB uses a 5-point Likert scale to measure and analyze the responses and includes open-ended questions so that people can share their opinion on the different topics asked in the survey.

When asking evaluation questions about content and activities, it is necessary to be sensitive to gender and cultural issues and avoid stereotypes (UN Women, 2018). However, in addition to taking care of how the questions are asked, it is also necessary to include questions that evaluate the course from gender and diversity perspectives. For example, one can ask whether the course contents reflect how the issues addressed explicitly affect women, indigenous populations, or Afro-descendant people or whether the course contents have been respectful of women, people with disabilities, indigenous populations, Afro-descendant people, and the LGBT collective. These questions will help improve future editions of the course to make it more inclusive.

It is also possible to evaluate how well these guidelines' recommendations have been included in the course production by asking. For example, if the instructors and learning resources of the course present a balance by the number of men and women. The same applies to implementation, where you can ask whether the course team with whom they have interacted (tutors, members of the technical part, etc.) have been respectful of women, people with disabilities, indigenous populations, Afro-descendants, and the LGBT community, or whether the participation of all people has been equally guaranteed in the activities.

To draw richer conclusions, the gender and self-identification questions should also be repeated in this survey. This will make it possible to know what affects whom, to compare and extract differentiated statistics, and improve the learning resources of the course or its implementation.

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6.4 Analysis

Adding questions that provide a gender and diversity perspective will give information to evaluate these aspects. Thus, the evaluation reports data and indicators on these areas with differentiated analysis by diverse groups to identify differences in perceptions.

Different elements could be analyzed in terms of gender, age, and origin of the participants:

- Topics of most interest and preferred activities to address them.
- Identify barriers to accessing or completing the course. Analyze access data versus the universe. For example, if a topic affects more women (such as water), why are more men

in the course. Alternatively, if an issue affects more indigenous populations, it should be verified whether or not these populations are represented in the course.

- If the contents and methodology are friendly to all the groups that make up the target audience or if different results can be seen depending on the origin or gender of the people.
- Whether the different groups feel represented and respected.

Analyzing this survey's information allows you to understand these perspectives better, acknowledge the differences and specific needs, and improve the course and its implementation. If, for example, it is observed that a significant percentage of people who said they are transgender respond that tutors have not been respectful to women, people with disabilities, indigenous people, people of African descent, and the LGBT community, it is possible to identify who the tutors were and support them in not applying biases when talking or dealing with the student body and to use respectful and inclusive practices. The analysis of the open-ended questions could also identify whether there were improper or discriminatory practices and implement corrective measures.

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CHECKLISTS

Checklists have been developed to ensure that the gender and diversity standards defined for each phase of the ADDIE model are included in each stage.

Each question can be answered with a yes or no answer. When no is indicated, it does not mean that gender and diversity approaches have not been applied in that part, but rather that there are times when, although it has been considered how these approaches could be included, no way has been found to do so. The mere fact of asking the question is already applying the standards of the guidelines.

In the “why” section, we can explain our answers to reflect on why we answered that way.

For example, when we say no in the question that asks if the team includes people who work on projects related to gender and diversity, we can specify in the reasons “why” section. For instance, it was not included because despite having tried, the client did not have any person who had worked on these issues, or those who had experience did not have the availability of time to work on the course team.

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1. NEEDS ASSESSMENT STANDARD

The learning needs assessment incorporates enough elements of gender and diversity to develop a product that respects international gender and diversity policies.



Were essential gender and diversity documents and this guidelines document shared with the client or Subject Matter Expert (SME)?

YES NO

WHY? _____



Did the course team include people who work in areas related to gender, diversity, or experts in these topics to provide ongoing advice?

YES NO

WHY? _____



Has the original issue in the course been expressed from the point of view of gender and diversity, reflecting how it affects diverse groups in a differentiated manner?

YES NO

WHY? _____



Do gender, age, and ethnicity disaggregate course success indicators?

SI NO

WHY? _____



Has the audience been analyzed in such a way as to systematize the peculiarities by gender or origin?

YES NO

WHY? _____



Have groups underrepresented by race, culture, gender, etc., been included as a potential audience for the course?

YES NO

WHY? _____



Did you include knowledge related to gender, equity, equality issues in the course contents?

YES NO

¿WHY? _____



Did you include knowledge and wisdom of indigenous or Afro-descendant peoples in the course contents?

YES NO

WHY? _____

2. INSTRUCTIONAL DESIGN STANDARD

The instructional design of the courses reflects the diversity of the audience and does not incorporate elements of negative impact on gender and diversity issues.



Was it possible to include gender equality or equity learning objectives?

YES NO

WHY? _____



Does the course content include diverse viewpoints and different cultural representations and not only represent the dominant culture?

YES NO

WHY? _____



Do the contents included in the course reflect gender, women's rights, equality, and equity issues?

YES NO

WHY? _____



Does the course's content include the peculiarities of the development of indigenous and Afro-descendant peoples, their cosmology, their rights, traditions, and ancestral knowledge?

YES NO

WHY? _____



Has any objective been incorporated that reflects gender or diversity issues, expressing how this problem affects different population groups according to their ethnic, cultural, sexual, religious origin?

YES NO

WHY? _____



Have the course contents included cases that reflect the differentiated reality of how the course topics affect different population groups according to their ethnic, cultural, sexual, religious origin?

YES NO

WHY? _____



3. PRODUCTION STANDARD

The course learning resources have been developed and designed incorporating the gender and diversity dimensions.



Do the course materials use inclusive language?

YES NO

WHY? _____



Have the activities been designed following the recommendations of these guidelines?

YES NO

WHY? _____



Do the videos have both male and female presenters, and do both convey elements of technical content?

YES NO

WHY? _____



Do the course videos show various people from a gender and diversity perspective without stereotyping anyone, where all people, regardless of gender and background, have equally relevant discourse?

YES NO

WHY? _____



Do the images used in the course show various people from the point of view of gender and diversity without stereotyping?

YES NO

WHY? _____



Do videos and images show both men and women from diverse backgrounds in positions of power and vulnerability interchangeably?

YES NO

WHY? _____

Do the images and language of the videos and readings show non-stereotypical attitudes towards different groups?

YES NO

WHY? _____

In the optional or supporting resources, are there bibliographies that reflect the course's subject matter from different perspectives, such as women, indigenous peoples, etc.?

YES NO

WHY? _____

4. IMPLEMENTATION STANDARD

Courses are facilitated or taught from start to end, respecting the gender and cultural diversity of the participants.



Has it been possible to ensure equal opportunity to participate in the course regardless of race, ethnicity, language, religion, gender, cultural background, socio-cultural status, and sexual orientation?

YES NO

WHY? _____



Does the participant support system include the possibility of learners commenting on discrimination, gender bias, abusive or sexist behavior?

YES NO

WHY? _____



In netiquette, are there behavioral instructions related to respect and non-discrimination based on gender or diversity?

YES NO

WHY? _____

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5. EVALUATION STANDARD

The data collection and analysis instruments for course evaluation incorporate gender and diversity dimensions.



Have the surveys been modified to include a gender and diversity perspective?

YES NO

WHY? _____



Have the surveys been treated to analyze results by gender and cultural, ethnic, or racial origin?

YES NO

WHY? _____



ANNEX A. BASIC ISSUES ON GENDER AND DIVERSITY

The content of this annex will help the user of the guidelines to focus on the subject matter and understand the practical indications. In addition, it includes suggestions on where to find more content and training opportunities to take ownership of the subject matter.

A.1 GENDER

A.1.1. Brief gender knowledge explanation: Sex vs. Gender

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When we speak of "sex," we refer to the biological differences between females and males. They are determined by birth and do not change by themselves. These differences include:

- The internal and external genital organs.
- Endocrine peculiarities.
- Differences related to the function of procreation.

Based on these biological characteristics, we are classified as "male" or "female." However, people whose bodies present a different genetic, gonadal, morphological, or hormonal configuration are called intersex.

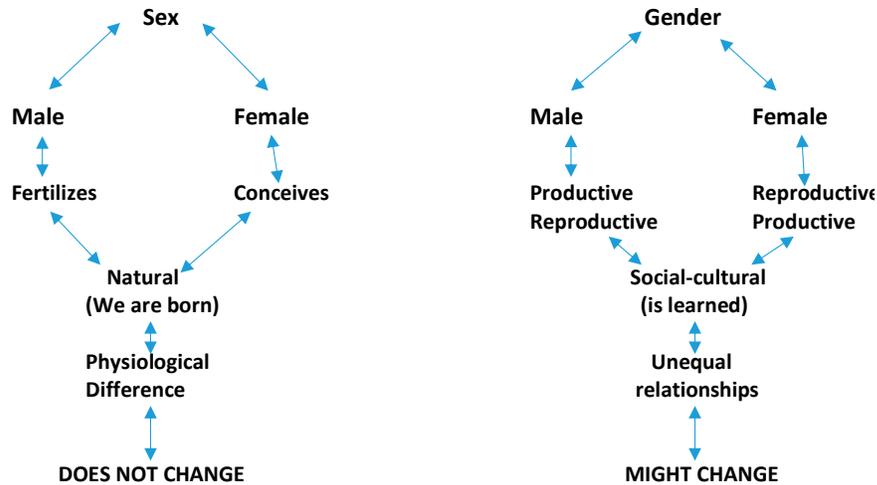
"Gender" refers to the other attributes that have been socially, historically, culturally, and geographically assigned to men and women. To define "gender," one can use the definition provided by the IDB in the "[Operational Policy on Gender Equality in Development](#)" document published in November 2010:

"Gender refers to the behavioral characteristics and roles that are socially attributed to women and men in a given historical, cultural, and socioeconomic context, beyond their biological differences, and that help shape the responsibilities, opportunities, and barriers encountered by women and men" (Inter-American Development Bank, 2010).

The concept of "constructed" or "biological" can be used (Yaksic Prudencia, 2001) to differenti-

ate between sex and gender: If it said, "women menstruate." Menstruation refers to something biological; therefore, we are talking about sex. On the other hand, if it is said, "with menstruation, women cannot bathe," cultural and socially constructed beliefs are transmitted. Consequently, there is no biological fact behind this statement, we can conclude that it is a gender issue.

Differences between Sex and Gender



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A.1.2 Components of Gender Definition

Gender determines what it is believed men and women should do and how they should behave: Roles.

The term "Gender" refers to the social and cultural features identified as masculine and feminine. These characteristics can range from the functions assigned to one sex or the other (providing v. caring), the attitudes attributed to them (rationality, strength, assertiveness v. emotionality, solidarity, patience), to the ways of dressing, walking, talking, thinking, feeling and relating to others (Autonomous University of Mexico 2016, p. 4)

Following up on the attribution of functions and attitudes, the roles that everyone must play in society have been determined beforehand. Although the roles guidelines a person's actions, roles comprise expectations and rules that society establishes, such as how a person should act and feel according to whether this person is a woman or a man, taking for granted their position in the social structure, and assuming distinctive functions attributed to women and men. (Berdasco García, 2018, p. 71)

REPRODUCTIVE ROLE	PRODUCTIVE ROLE	COMMUNITY ROLE
<ul style="list-style-type: none"> ● Task associated with biological reproduction (giving birth and raising children). ● Task of daily maintenance of the labor force (food preparation, water, firewood collection, sanitation of the dwelling and maintenance of its habitability conditions, supply, care, and emotional attention to family members). ● The task for reproducing the social order (socialization of daughters and sons, maintenance of family and mutual support networks, transmission of cultural assets). 	<p>Task-related to maintenance and economic support.</p>	<p>Task-related to the organization and management of society, active participation, politics.</p>
<p>Women and girls almost always perform them, and in impoverished communities, they consume a lot of energy and time because they are done manually.</p>	<p>It was essentially attributed to men.</p> <p>If women exercise it, it is often as secondary income generators.</p>	<p>Both participate at different levels.</p>
<p>Roles are directly associated with the relationship spheres, and these mark different times and spaces.</p>		
<p>Domestic</p> <ul style="list-style-type: none"> ● Invisible ● Enclosed ● Isolated space ● Scarce existence of social relations 	<p>Public sphere</p> <ul style="list-style-type: none"> ● Visible ● Open ● Relationship space ● Space of social power 	<p>When men exercise it, it is usually a general political level of authority (mayor's office, political parties, councils).</p> <p>Women are usually related to community management (volunteering, drinking water committees, students' family associations, organization of social events, ceremonies, and celebrations)</p>
<ul style="list-style-type: none"> ● Circular time. It has no known beginning or end. ● Has no schedule but is systematic. ● Has no social value. ● Has no utility value. It is not integrated into official statistics. 	<ul style="list-style-type: none"> ● Time with well-known beginning and end. ● Has a schedule. ● Has social value. ● Has utility value, economic value. ● It produces goods and services. 	

Today, this vision seems to be stereotyped and is no longer common, partly because of the new professional opportunities available to women and adopting a more open and egalitarian social model. However, in many societies, the reproductive role falls primarily on women who have gained access to the public workspace. However, when they return home, they must fulfill what is called "a double workday."

Gender changes over time and from one culture to another.

This view today seems stereotypical or old-fashioned, mainly in urban societies of a particular social class. Nevertheless, gender is a social construct that changes over time, from one culture to another to the same generation. Even within the same country, considerations of what is appropriate for people change from rural to urban.

From the classic examples of how boys and men in many societies today reject pink when in the European monarchies of the 17th century, this color was used to dress child princes because it was considered the little red, red being the color of kings and a symbol of power. Even more current examples if we compare what society expected from our grandfathers and grandmothers and what it expects from our generation.

Gender impacts all aspects of life: economic, political, and social.

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There are no behaviors exclusive to one sex. In general, behaviors are influenced by social processes of gender assignment that change by individual choice and context transformations, such as economy, politics, culture, demography, among others.

The point is that these behaviors, characteristics, and roles attributed to one or the other gender affect all areas of life and prevent the full enjoyment of rights that are not attributed equally.

In the political sphere, women are prevented from voting or are excluded from particular instances of power.

In the economic sphere, women need their husband or father's permission to access a bank loan.

In the socio-cultural sphere, girls are the first to drop out of school at an early age or are not even enrolled in school because they do not have the same value as boys. Alternatively, when boys are oriented towards repressing their feelings or resolving conflicts through violence.

A chain of circumstances derived from gender issues, for example:

If women are not educated, they will not have access to skilled jobs. Furthermore, if a patriarchal society excludes women from positions of power, they will never have the capacity to manage wealth. Therefore, it is expected that there will be more poor women. Poverty is the single most significant determinant of poor health: poor people die younger, suffer more significant disabilities, are exposed to higher risks, and have fewer resources for recovery when they get sick.

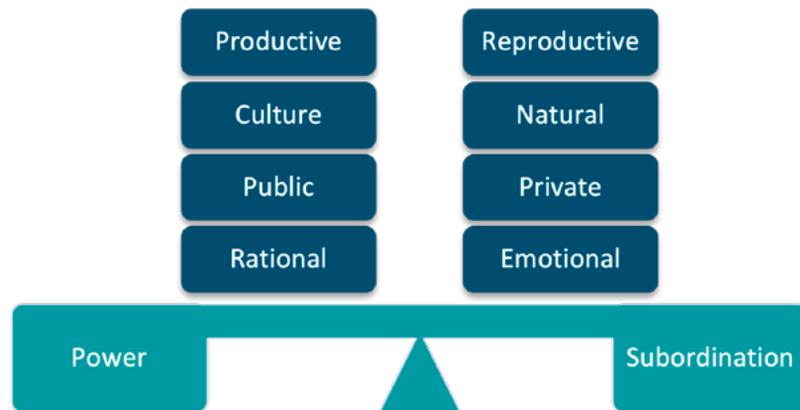


In addition to the conditions of poverty, which produce a poor quality of life, other factors can aggravate the situation, such as age and ethnicity.

Gender is about power and how it is distributed.

As a result of stereotypes and gender roles, power spaces have not been distributed equally and are occupied mostly by men.

This has led to the construction called a "hierarchical dichotomy," where one part of society assumes power at the expense of the subordination of the other:



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A.1.3. How Gender Identity is Developed

It is developed from the moment of birth and even before birth, thanks to ultrasound scans. Gender identity is achieved through socialization, behavior, customs, knowledge, beliefs, and values assigned to one sex.

This means that both men and women must conform to patterns that society imposes as masculine and feminine. As a result, people of both sexes respond not to be marginalized within their social group.

These are differentiated socialization processes since men and women are considered different people. Therefore, they offer us additional opportunities and condition us differently.

In the Judeo-Christian culture predominant in Latin America and the Caribbean today, we can affirm that:

Being born as a man means	Being born as a woman means
Being strong, invulnerable, contained emotionality, with scarce affective needs and greater initiative that places him, to a greater degree, exposed to challenges and challenges.	To be the weaker and secondary sex, vulnerable, expressed emotionality, significant affective needs, attributing less physical strength and capacity that places us exposed to dangers to a greater extent.
Man is supposed to show...	Woman is supposed to show...(Toledano Buendía, 2015)
<ul style="list-style-type: none"> ● Diminished basic self-esteem ● Emotional detachment ● Inhibited affectivity ● Personal security demanded ● Incorporated self-demandingness ● Diminished resistance to stress ● Empathic incapacity ● Low frustration threshold 	<ul style="list-style-type: none"> ● Reinforced basic self-esteem ● Integrated emotionality ● Assumed affectivity ● Personal security questioned ● The admitted margin of error ● Accepted dependence ● Empathic capacity ● Resistance to stress

A.1.4. Implications

Stereotypes

Based on those classifications, women and men are typified as expressions of femininity, masculinity and ruled symbolically. As a result, they become a rigid stereotype that limits people's potential by stimulating or repressing behaviors according to their adaptation to the feminine or masculine ideal. Thus, even though, in their individual development, each person adapts to a greater or lesser extent to the set of expectations and behaviors considered to be characteristic of their gender, gender roles are so deeply rooted that they come to be considered as the expression of the biological foundations of gender (Perez de Armiño, 2008).

A stereotype is a generalized preconception resulting from assigning specific attributes, characteristics, or roles to people because of their apparent membership in a particular social group (Perez de Armiño, 2008).

Gender stereotypes are related to the characteristics socially and culturally assigned to men and women based on physical differences based on their sex. Although stereotypes affect both men and women, they have a more significant adverse effect on the latter. This is because society has historically assigned them secondary, socially less valued, and hierarchically inferior roles.

Gender Division of labor

A growing separation between the private sphere (family or domestic) and the public sphere has given rise to a first generic division of labor. It is assigning women activities related to family care and men's activities in the public spheres. This has led to a specialization of women in reproductive roles (as mothers and those responsible for family welfare) and men in productive roles (paid workers, providers of economic sustenance (Perez de Armiño, 2008).

A second gender division of labor occurs in the field of employment. When women enter the labor market, they find that it operates sexual segregation that reserves mostly occupations and tasks related to the skills, attitudes, and qualities assumed for the female gender. Generally, an extension of the reproductive roles women plays in the home. The social assumption that paid work is a subsidiary activity for women (since the female stereotype establishes that maternal and domestic activities are their leading role) converts the female labor force into a secondary workforce. It justifies the wage differentials that exist between men and women in all current societies (Perez de Armiño, 2008).

Manuals and online courses on gender:

- Methodological guidelines for integrating a gender perspective in development programs and projects available at http://www.emakunde.euskadi.eus/u72-publicac/es/contenidos/informacion/pub_guias/es_emakunde/adjuntos/guia_genero_es.pdf
- The gender approach in social intervention available at http://www.cruzroja.es/pls/portal30/docs/PAGE/2006_3_IS/BIBLIOTECA/MANUAL%20DE%20G%C9NERO223808.PDF
- Course on gender identity and sexual diversity available at <https://www.udemy.com/igualdad-de-genero-y-diversidad-sexual/?siteID=afkiplcrEmU-lfxl4wgRhTwGy470Sf-wdmg&LSNPUBID=afkiplcrEmU>
- IASC course on gender approach (available in English or French-oriented to emergencies, but excellent to learn the basics on gender issues) available at <http://www.iasc-elearning.org/>
- Varied offer of Un Women available in <https://trainingcentre.unwomen.org/?lang=es>

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A.2 DIVERSITY

According to the IDB glossary, diversity is "how people differ from one another, even based on gender, nationality, ethnicity, race and/or physical ability, among others."

Sometimes, the approach is to differences and similarities, visible or invisible, in individuals. These include:

- Ethnicity
- Gender and age
- National origin
- Disabilities
- Sexual orientation
- Education and religion
- Cultural background

The Inter-American Development Bank's [Diversity Action Plan](#) includes actions to address the needs of indigenous peoples, Afro-descendants, people with disabilities, and LGBTQ people in LAC countries. These groups have unique identities, and characteristics vis-à-vis the dominant culture and together represent about 40% of the region's population (Inter-American Development Bank, 2019, p. 1). Some of these groups have been historically marginalized. Particular perceptions, biases, and stereotypes influence how they are accepted, their opportunities, and the limitations to access certain economic or social status levels.

The IDB is intended with its policies to include in the definition of policies and programs the characteristics and needs of the different population groups existing in the region (Inter-American Development Bank, 2019, p. 3). It is considered that the development of the region should be egalitarian and include the entire population. These impacts developing policies that evaluate a product with identity, recognizing and giving value to those cultural differences existing in Latin America and the Caribbean.

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The lack of recognition of the diversity of the population and the design of specific policies to mitigate the effects of discrimination lead to the fact that these groups may be marginalized have particular access barriers, present lagging human capital indicators, threaten governance and resource management, as well as the loss of representation of traditional authorities (Inter-American Development Bank, 2017, p. 6).

A people-centered approach must be applied to include diversity, where their particularities must be understood and their peculiarities recognized. Through the participation of different groups in decisions, interventions are developed to provide quality services and generate opportunities for diverse groups (Inter-American Development Bank, 2017, p. 9).

The IDB's diversity policies pay special attention to indigenous populations. Currently, more than 370 million people in the region self-identify as indigenous, located in approximately 90 countries. Latin America is a multiethnic and pluricultural region, with diverse Afro-descendant groups and more than 670 indigenous peoples. Each of them is an active political and social actor and contributor to the world's heritage and memory. However, these groups are among the most vulnerable globally, and poverty affects 43% of indigenous households in Latin America and the Caribbean, more than double the proportion among non-indigenous ones (World Bank, 2015).



To date, there is no universally accepted definition of indigenous peoples. Moreover, the diversity among regions and countries and the differences in origin, culture, history, and conditions make it challenging to develop a single definition at the international level applicable to all indigenous communities.

ILO Convention

A group of people is considered indigenous on account of their descent from the populations which inhabited the country, or a geographical region to which the country belongs, at the time of conquest or colonization or the establishment of present state boundaries and who, irrespective of their legal status, retain some or all of their own social, economic, cultural and political institutions (ILO, 1989).

According to the United Nations Declaration on the Rights of Indigenous Peoples:

Article 15: Indigenous peoples have the right to have the dignity and diversity of their cultures, traditions, histories, and aspirations appropriately reflected in education and public information (United Nations, 2007, p. 7).

Article 16: Indigenous peoples have the right to establish their media in their languages and access all other non-indigenous media without discrimination (United Nations, 2007, p. 8).

Because of this diversity, even within ancestral or indigenous peoples and the different realities and legislations. Therefore, the IDB has chosen to apply policies and actions at the national level rather than making a single picture that applies to all countries and situations.

Manuals and online courses on diversity and indigenous populations:

- ECLAC - Indigenous and Afro-descendant Peoples: <https://www.cepal.org/es/temas/pueblos-indigenas-y-afrodescendientes>
- FAO and indigenous peoples: <http://www.fao.org/indigenous-peoples/es/>
- The IDB's human resources division has a course on inclusion and diversity.

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