CHAPTER 2
PLANNING AND ASSESSMENT

The tools contained in this section provide guidance on the planning and assessment phase of Protection, Gender and Inclusion (PGI) in Emergencies.

Planning and assessment tools in brief

These tools should be used to:

- Complete the Emergency Plan of Action (EPoA), including the PGI standalone section and budget
- Provide constructive feedback on the EPoA, and measure whether it has met PGI criteria
- Perform a PGI Rapid Assessment and Analysis, to inform the response
- Set a standard for how sex, age and disability disaggregated data should be collected throughout the operation
- Design assessments (either standalone PGI assessment, or to select questions to be integrated into sectoral needs assessments in collaboration with sector leads)
- Develop accurate PGI budgets
- Perform focus group discussions with community members as part of the planning process

The tools in this section are:

TOOL NAME	PURPOSE	INTENDED USER	RECOVERY PHASE
TOOL 2.0: PGI PLAN OF ARRIVAL	This tool helps to put tasks in priority order and plan PGI deliverables and coordination.	A PGI Staff member or focal point in the field.	**READY TO GO!**
TOOL 2.1: HOW TO INTEGRATE PGI INTO AN EPOA	This tool provides comprehensive guidance to assist you to integrate PGI analysis into an emergency plan of action. It contains guidance per section of the EPoA.	A PGI Staff member or focal point in the field or at HQ/regional level. Ideally, this person is responsible for integrating PGI into the overall EPoA.	**READY TO GO!**
TOOL 2.2: PGI IN EPOA – CHECKLIST AND MARKER	This checklist tool assists in analysing whether an EPoA has successfully integrated PGI concerns. It contains Annex 1: EPoA PGI 1-page Marker which can be used to track whether drafts of EPoAs improve PGI integration over time. This tool will help track and monitor integration of PGI into EPoAs over time and gives the user a template to identify areas for improvement within the EPoA and to give direct feedback on how to improve.	PMER staff, DM focal points, Regional PGI Staff, and National Societies interested in funding/tracking PGI	**READY TO GO!**
TOOL 2.3: PGI BUDGET TEMPLATE	A simple budget template designed to help PGI staff and focal points in the field to develop accurate budgets for PGI assessment, monitoring and standalone programming. This template is not in the format of an EPOA budget, as EPOA budgets have standard budget codes, rather this will help design a budget whether or not an EPOA is in use.	PGI staff and focal points in the field	**READY TO GO!**

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TOOL 2.4: PGI ASSESSMENT AND ANALYSIS GUIDANCE AND LIBRARY	This document contains guidance on how to use the Assessment library, and how the required steps to complete a Rapid PGI Analysis. The Excel spreadsheet contains 6 tabs with the key questions to 1. Perform a desk-based PGI assessment 2. Perform a rapid field-based PGI assessment 3. Set the Sex, Age, Disability data collection parameters of the response (in collaboration with the PMER, DM, IM and other teams) 4. Suggest 3-5 PGI questions to be integrated into each of the Sectoral Assessments (you will need to prioritise from this long list, which is based on the IFRC PGI Minimum Standards in Emergencies sectoral guidance) 5. Benchmark knowledge, skills and confidence of the volunteers and staff who are likely to support or implement PGI activities. 6. Perform a Sexual Exploitation and Abuse Risk Assessment	PGI Staff in the field, PGI staff in headquarters and regional offices; Tab 4 can be used by sector leads who should choose max 5 questions to integrate into their existing assessment methodology.	**READY TO GO!**

TOOL NAME	PURPOSE	INTENDED USER	RECOVERY PHASE
TOOL 2.5: RAPID PGI ANALYSIS TEMPLATE	This template is designed to guide the analysis of the desk-based and field-based PGI assessments. It provides a pro-forma with editable sections.	PGI staff or focal points	**READY TO GO!** This tool can also be used in recovery planning (where a recovery plan is intended) or to inform ongoing recovery from outset of emergency response
TOOL 2.6: PGI FOCUS GROUP DISCUSSION GUIDE	This tool provides guidance, activities, questions and a note-taking page for performing PGI specific focus group discussions with men, women, boys, girls and people of all genders in the community. It includes questions that will provide details about dignity, access, participation and safety needs of different groups in the community. Such information can complement the Rapid PGI Analysis, the sectoral plans, the overall response, or can be performed to improve quality throughout implementation.	PGI staff guiding PGI trained volunteers	**READY TO GO!**