How to conduct a Gender Analysis
A Guidance Note for UNDP Staff

INTRODUCTION

The UNDP Strategic Plan places special emphasis on gender equality and the empowerment of women. The SP integrates gender concerns into six of its outcomes, and gender equality is the sole focus of outcome 4. UNDP Gender Equality Strategy, 2014-2017 provides strategic guidance to UNDP business units to mainstream gender as they operationalize the UNDP Strategic Plan (SP), 2014-2017. To achieve SP goals all UNDP country programmes and projects should include specific measures to address gender inequalities and gender (and sex) disaggregated data and indicators.

In 2015, the UNDP Independent Evaluation Office (IEO) conducted a thematic evaluation of the contribution of UNDP to gender equality and women's. The evaluation found that "UNDP has yet to develop a firm corporate policy that ensures gender analysis is a mandatory requirement in all programming", and recommends that "UNDP should focus on refining tools, instruments and processes developed during the period 2008-2013 and focus on further internalizing the centrality of gender equality and women's empowerment to the achievement of all development goals among staff". This tool intends to respond to the 2015 evaluation.

The guidelines are designed for programme staff in charge of formulating and implementing programmes and projects. It intends to help project managers to ensure that gender issues are systematically integrated at each stage of the project cycle. It will also help to meet the Project Quality System (Q&A) requirements at all stages of the project.

The tool is divided into two parts: the first part presents what is gender analysis as a tool and how to use it to assess the differences in the lives of women and men, girls and boys and the relationships between and amongst them. The second part provides guidance on how to apply gender analysis in Projects. Finally, it includes an example of Terms of Reference to commission a gender analysis for programming.

UNDP would like to acknowledge that material has been drawn from different institutions and organizations. We thank all UNDP colleagues to make this practical guideline possible.

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I. GENDER ANALYSIS: WHAT YOU NEED TO KNOW

It is important to be clear about **why** and **when** to perform the analysis, **what** the scope entails, **who** is to be involved and the amount of time and other resources you have to provide.

1.1. What is a gender analysis and what does it tell us?

- **Gender analysis is the critical starting point for gender mainstreaming:** The first step in a mainstreaming strategy is the assessment of how and why gender differences and inequalities are relevant to the subject under discussion. <u>**Without it gender mainstreaming is not possible.**</u>

- **Gender analysis is a tool that brings to the surface gender disparities** of a core problem. It reveals the connections between gender relations and the development challenge to be solved, it indicates exactly what that impact is likely to be, and promotes alternative courses of action.

  > **What is a gender analysis?**
  >
  > • **An intrinsic dimension of policy analysis**
  >
  > • **Identifies specifically how public policy affects women and men differently**
  >
  > • **Demonstrates that policy and implementation cannot be gender neutral in gendered societies**
  >
  > • **Is supported by specific analytic tools**

- **Gender analysis is a systematic analytical process** based on sex-disaggregated and gender information. This process is used to identify, understand, and describe gender differences and the relevance of gender roles and power dynamics in a particular context.

- A gender analysis helps **ensure equitable participation of women and men in development processes and projects.** In some cases, gender issues may be significant to the process/project, and play a determining role in outcomes. In other instances, they may be less significant, and constitute rather a set of factors to be weighed with others.

- It should **show the linkages between inequalities at different societal levels**. Don't forget that neither women nor men form a homogeneous group. Gender relations intersect with many categories of social identities, such as religious, political affiliation, ethnicity, social status, age, and sexual orientation.

- If we don't make those linkages, we run the risk to **reinforce the existing imbalances.**

1.2. What resources do we need for an effective gender analysis?[1]

- **Specialized expertise** in gender issues and/or sector-specific, and an allocation of financial resources for analyses.

- **Access to national gender statistics,** operations research (i.e., findings derived from testing pilot projects, and from programme monitoring and evaluation).

- **Access to qualitative data** generated through policy and academic research and participation assessments.

1.3. Why is the gender analysis linked to the results based management cycle of UNDP programmes/projects?

The **results of the gender analysis are the foundation for taking gender into account in all steps of a project cycle**. Conducting a gender analysis – whether in the design phase or at another point in the project term – produces recommendations[2] to:

1. Answer questions in regard to the (baseline) situation.
2. Develop a gender-responsive theory of change and devise a methodological approach.
3. Include gender issues within the scope of projects and programmes
4. Make necessary changes to the monitoring system.

When you link gender analysis to the result-based management cycle of development measurements it also provides a basis for assigning the gender marker. Even if a project or programme does not include gender relevance and is scores GEN 0, the decision to assign this marker must be based on the results of the gender analysis.

1.4. When do we use a gender analysis?

Gender Analysis can be done any time we are looking for ways in which to better understand and improve our programmes/projects. However, **there are definitely situations that present more opportune moments to execute a gender analysis** such as:

- During the initial design of a project
- Before the implementation of a policy
- During the midterm review and evaluation of a project or policy

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[1] Adapted from UN Women, 2014

[2] GIZ, 2011

Overall, we use a gender analysis when we need to develop a comprehensive situational analysis or increase our understanding of gender issues and challenges in the countries we work. For example, we implement a gender analysis when we want to better understand[3]:

- Levels of participation and involvement of women and men, i.e.in the labor market, community decision-making, and use and control over natural resources
- Different experiences of specific development challenges such as poverty, migration, gang violence, etc.
- Different outcomes from the same intervention, i.e. education, health services, land titling
- Barriers and constraints to full participation by different groups, i.e. in decision-making
- Specific vulnerabilities and inequalities, i.e. single-female headed households, rural women, women with disabilities etc.
- Cultural and social patterns of behavior that appear to be direct opposition to the interests of certain individuals and groups, i.e. taking girls out of school earlier than boys.

1.5. What information should a good gender analysis provide?[4]

The Gender Analysis can be conducted from the grassroots levels (the micro level), intermediate levels (meso level), the highest political levels (macro level), and across all sectors and programmes of development collaborations. A good gender analysis helps us to better understand:

- How the **gender division of labour** and patterns of decision-making effect programmes/projects, and vice versa how programmes/projects effect the gender division of labour and decision- making.

- **Activities surrounding access to control over resources.** It includes an apperception of gender differentials of access to and control over resources, income, time, technologies and services. In addition, it helps us identify who has the better means to opportunities, for example in regards to land, livestock, financial services, health and education, employment, information and communication, and benefits

- **Power and Decision Making.** This set of information refers to people's ability to decide, influence, control, and enforce individual and governmental power. It examines the capacities of existing institutions and the mechanisms in place to reach out equitably to girls and boys, women and men, and to promote gender equality among target groups. It also refers to one's capacity to make decisions freely, and to exercise power over one's body, whether in a one's household, community, municipality, and state.

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[3] Source: United Nation Development Group, 2014

[4] Resources: Adapted from: UNDP (2007), USAID (2011), UNDP (2015), EC (2009), NZAID (2006)

- **Legal rights and status.** This dimension involves assessing how women and men are regarded and treated by customary and formal legal codes, and the judicial systems. This includes an assessment of state issued documentation such as identification cards, voter registration, and property titles. Furthermore, a substantive evaluation will include the right to inheritance, employment, atonement of wrongs, and legal representation.

- **Women's priorities, restraints and motivations:** This category includes a review of the different, but equally significant, needs and interests of women and men; depictions of the barriers faced by women in seeking to meet their practical and strategic gender interests; an identification of opportunities for greater equality and empowerment for women.

- **Time.** This area of information recognizes gender differences surrounding various needs of availability and allotment of time. It examines the implications that gender differences have on commitments and in turn the effects on poverty and work-life balance. Acknowledges the division of productive and reproductive work; the identification of how time is divided throughout the day, week, month, and/or year, and during the seasons. We can infer how this determines the contribution of men and women to the welfare of the family, community, and society.

- **Recommendations.** A good gender analysis should help us understand the best approaches to address gender inequalities and identify strategies to mobilize women's agency.

2. GENDER ANALYSIS IN PROJECTS

As noted earlier, gender analysis is a vital tool for gender mainstreaming. **Gender Analysis should inform the fundamental stages of project design and planning.** The depth and level of an analysis depends on your specific situation and policy needs. Let us now examine how gender analysis works throughout the process of mainstreaming during the different stages of project design and planning:

2.1. Develop a Situational Analysis

In a project design, **gender analysis helps you to develop a situational analysis** of a given context and identify concrete development challenges. This brings to light the evidences of systemic causes of gender inequalities associated to the problem you have selected. You must use this information to make decisions about the design of your intervention (i.e., your intended goals, outcomes and target audience and your planned actions) and be in line with corporate commitments.

This step **requires an assessment of gender implications** of working on, for example, environment, poverty elimination, health development, and all other areas of development.

To undertake a detailed gender analysis, **ensure that TORs for commissioned consultant/research include the need for gender analysis,** and that researchers have appropriate gender analysis skills.

The analysis of a problem/situation must include a holistic perspective of human rights, and related obligations of Governments, international human rights standards, and recommendations made by CEDAW and Universal Periodic Review (UPR)

Steps

1. Disaggregate information by sex, age, ethnic origin, etc. and indicate where disaggregated data is not available.
2. Actively involve women and men, from diverse social groups in the analysis and identification of needs.
3. Collect background information. It involves a description of relevant actions/measures taken by the Government, other actors, women´s groups and UNDP to address gender inequalities on the issue/sector we want to address through the project. Take into consideration any recommendations of preceding actions on the issue.
4. Highlight gender issues in discussions with stakeholders during this stage.
5. Analyze relevant current gender information, especially socio-economic information, taking into consideration among others: gender roles, access and control to resources; sexual division of labor; time poverty, power relations and legal rights, etc.
6. Analyze systemic causes of the problem from a gender perspective.

Questions that inform a gender analysis at this stage:

How do you identify women and men different needs and interests?

♦ Did you analyze if the identified problems have the same impact on women and men?
♦ Did you include disaggregated information in the analysis of the problem?
♦ Did you identify gender gaps?
♦ Did you analyze the underlying causes of these gender gaps associated to the problem analysis?

Did you identify existing national capacities in response to the gender equalities associated to the problem to be addressed by the project?

♦ Have you taken into account the main recommendations for the country made by CEDAW and UPR on the issue?
♦ Have all national legal frameworks and policies associated to the problem have been included in the analysis? (Do they integrate a gender perspective? / Are there gender equality or gender specific policies addressed to women?)
♦ Did you identified comparative advantages of UNDP's assistance, as well as lessons learned in previous initiatives on the issue?

2.2. Use Gender Analysis to develop your intervention strategies (theory of change and project priorities)

During this step UNDP and its partners have to develop strategies required to facilitate transformative changes. Based on thorough contextual research and programmatic background, your **theory of change** should create the pathways through which the outputs or intermediary results are expected to   contribute to the gender equality-related long-term development outcomes of a given sector.

You should **appropriate the findings from the gender analysis into recommendations for programme modalities**, and provide a rationale for the programme objectives, targets and budgets, enabling donor, government and civil society agencies to develop a collective vision of what 'success' looks like. The theory of change also helps identify potential risks and unintended consequences, and clarify assumptions about the prerequisites for progress. (UN Women, 2014).

This is than **the proper time to decide on gender strategies** taking into account UNDP approaches, gender benefits and differentiated impacts.

Steps

1. Articulate a theory of change to understand how change happens through gender mainstreaming.
2. Determine and explain the mix of strategies that will be utilized to support the achievement of results from a gender perspective.
3. Analyze what partners and non-partners have to do to contribute to those changes.
4. Analyze institutional capacities from a gender perspective in order to facilitate and lead those changes.
5. Identify relevant actors to contribute to gender mainstreaming in the project cycle.

2.3. Results Framework

As noted before, the Results Frameworks are underpinned with a theory of change. Programme results formulation should be rooted in knowledge and evidence, hence results must stem from sound sectorial and context-based gender analysis. **It is particularly important that** the **results framework adequately reflects social and gender analysis that has been undertaken during the design and shows consistency between the analysis of situation, and the proposed programme**.

The statement of the goal, outcomes, outputs and indicators should include explicit references to gender equality, and specific results and indicators showing the benefits to be gained by women and men.

Indicators should be able to measure changes in gender relations and institutions such as the law, employment, social service provision, and local custom over the course of a project intervention. If the gender dimension is not visible at the level of outcomes, it should be explicit at the output level.

Steps

1. Explore consistency between gender issues identified in gender analysis and proposed project and RRF.
2. If the information and analysis is relevant, define gender equality as a specific outcome.
3. Identify the way gender will be systematically mainstreamed in the project outcomes and outputs.
4. Identify key activities for gender equality and women´s empowerment.
5. Develop measurable indicators and/or key questions referring to gender and appropriate to the intervention.
6. Identify measures to avoid, mitigate or manage any possible negative gender impacts of the project (See Social and Environmental Screening Quality Standards).
7. Define the structure and capacities to be developed to respond to gender inequalities to be addressed by the project.
8. Identify assumptions and risks from a gender perspective.
9. Explain the steps the Country Office will take to ensure project quality, effectiveness and efficiency is improved from a gender perspective.

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Questions that inform a gender analysis at this stage:

What gender equality results are achievable in the short, medium and long term?

- ◆ Does the proposed result framework specify how it will address the dimensions of gender inequality described in the analysis? Does it include specific targets to close identified gender gaps? If not, is there an explanation given of why it has not been considered?
- ◆ Have the outcomes and outputs been planned with the relevance and benefits in mind for both women and men?
- ◆ Have specific gender outcome and output indicators and/or key questions been developed?
- ◆ Do the outputs and activities included in the capacity development measures reduce gender inequalities related to the issue?
- ◆ Who participated in choosing the objectives/results from the variety of needs to be addressed?

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2.4. Budget and Work Plan

Now it is **time to demonstrate how UNDP has shown commitment to gender equality and women´s empowerment**. This priority must be reflected in the work plan, budget and the human resources structure.

Steps

1. Highlight specific gender items in the budget. Define your strategy to track consistently the flow of gender-focused resource allocation with UNDP policy.
2. Identify the necessary human resources with gender expertise for the implementation of the strategy.

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Questions that inform a gender analysis at this stage:

Have adequate resources been provided for gender equality and women´s empowerment?

◆ Does the Work Plan identify specific gender activities? Through what organization(s) will women be involved in the implementation and decision-making process of the Work Plan?
◆ Are access and equal participation of women and men a key criteria defined in the project for opportunities, benefits and resources?
◆ Is there gender-focused resource allocation for gender equality and women´s empowerment? Is it over 15% of the entire budget?
◆ Will be it possible to track the flow of these resources? Remember to assign the gender marker (ideally GEN2 or GEN3).
◆ Will gender experts, women´s organizations and machineries be involved in project implementation?

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2.5. Monitoring and Evaluation

Gender analysis can be used to help monitor progress from a gender perspective during the implementation of a project. If gender analysis was part of the planning phase, then using gender analysis in the monitoring and evaluation phase and Plan will allow you to see the extent to which your targets and goals are in progress or were met.

For that purpose, **gender issues should be mainstreamed in the Monitoring and Evaluation Plan.** Ensure that the agreed arrangements for programme management and M&E of the programme, and any issues related to the availability of gender data, is reliable, accessible and timely. There should be a gender indicator (as part of the Evaluation Plan) to measure the effects of the programme's investment in fostering equal opportunity in this section.

Steps

1. Include in the Monitoring and Evaluation Plan the why, when and who is responsible for monitoring gender outcomes, outputs and targets.
2. Define responsibilities, necessary information, and resources needed (financial and human resources) for the Monitoring and Evaluation phase.
3. Include in the project timeline gender specific activities, as well as training sessions to develop capacities for monitoring and evaluation.
4. Include gender marker in the Monitoring and Evaluation Plan.

If you are still into the process, or reviewing project documents, collaborating in the project design activities, participating in project review meetings and debriefing project design, or participating in evaluation and backstopping missions then you should consider amending your project design and reconsider the following:

- If you identified any key gender issues that will impact the ability of the project to achieve its goals or prevent women and men from benefiting equally, (i.e. Positive actions to increase participation rates for the less represented sex) amend your project to (i.e. new activities goals, gender indicators, etc.) ensure that men and women benefit equally.
- If you identified that the needs of men and women, in relation to this project, are substantially different, consider if it is necessary to create a separate project component focusing on women (or a sub-group of women) or men (or a sub-group of men).
- If necessary, identify new relevant data that should be collected to track the gender-related project impacts
- Identify any entry points or opportunities for empowering groups of women and/or men through the project. (i.e. These opportunities or entry-points can be found in research and analysis, policy development, use of statistics, training events and workshops/conferences)

Overall issues to remember[5]

➢ All UNDP staff should take responsibility for being personally informed about gender issues, gender analysis and gender mainstreaming, **and seeking out ways of promoting this understanding and commitment amongst colleagues, partner organisations or out-sourced individuals or groups.**

➢ **All UNDP staff should** ensure gender is incorporated into **the** terms of reference **for the identification/formulation phase to address and analyse the issue. (See Annex II)**

➢ **Employ** gender specialists or social development specialists with gender expertise **to assist in the design, monitoring and evaluation of the project.**

➢ **Undertake** participatory methodologies **that actively involve women and men;**

➢ Consult and partner with national women's machinery **at the appropriate level (national, district, community) in the design and monitoring of the project.**

➢ Assess the gender capacity of the implementing institutions **as a part of overall capacity development;**

➢ Identify gender related linkages with other projects and programmes **and incorporate them into the documentation.**

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[5] Sources: Adapted from: UNDP (2015); UNDP (2007); UN Women (2014); DFID (2002); EC (2009)

ANNEX I: Essential Concepts in Gender Analysis

- **Sex and Gender:** Sex refers to the biological differences between men and women, which are universal and do not change. Gender refers to social attributes that are learned or acquired during socialization as a member of a given community. Because these attributes are learned behaviors, they can and do change over time (with increasing rapidity as the rate of technological change intensifies), and vary across cultures. Gender therefore refers to the socially constructed attributes, roles, activities, responsibilities and needs associated to men (masculine) and women (feminine) in a given society at a given time, as well as any member of a specific community within that society.

- **Gender Relations:** The social relationships between women and men. Gender relations are concerned with how power is distributed between the sexes. They create and reproduce systemic differences in men's and women's position in a given society. They define the ways in which responsibilities and claims are allocated and the way in which each are valued

- **Changes in gender relations**: Gender roles and characteristics in almost all societies have under-gone many recent adjustments and changes. Changes in gender roles and relations often meet resistance, in particular from traditional cultural forces. Anticipation and preparation for these forms of resistance in relation to change in activities or the status and position of women is a valuable part of a project's gender strategy. Gender analysis can demonstrate that change in certain aspects of social roles and relations between women and men can improve the quality and conditions of life for everyone.

- **Productive work:** This is work that produces goods and services for exchange in the market place (for income). **Reproductive Care/Work**: This includes but is not limited to child-bearing and nurture. It has increasingly been referred to as "social reproduction" to indicate the broader scope of the term than the activities associated with biological reproduction. Women and girls are mainly responsible for this work, which is usually unpaid. There is an intersection of peoples' productive and reproductive responsibilities with policy priorities, which has repercussions at all levels of an economy and society, and is the principal focus of a gender analysis.

- **Differential Access to and Control over Resources**: It is important to distinguish how men and women access resources (land, labor, credit, income, etc.) and their ability to have control. Access gives a person the opportunity to benefit from the resource i.e. land to grow crops. Control allows a person to make decisions about who can and how one uses the resource (s) i.e. sell land. Base-line data in thorough gender analysis establishes whether there are any differences in men's and women's access to four key categories of resources: 1. Economic/Productive/Resources: (land, credit, cash income, employment) 2. Political 3. Resources: (education, political representation, leadership) 4. Time: (a critical resource, which increasingly acquires a monetary value).

- **Practical Gender Interests/Needs**: Women and men have different roles and responsibilities and therefore have different interests/needs. These are called gender interests, practical and/or strategic needs. Practical and strategic gender interests/needs should not be seen as separate, but

rather as a continuum. By consulting women on their practical gender interests/needs an entry point to address gender inequalities in the longer term (strategic gender interests/needs) can be created. Practical Gender Needs: These are gender needs that women and men can easily identify, as they relate to living conditions. Women may identify safe water, food, health care, cash income, as immediate needs. Meeting women's practical gender needs is essential in order to improve living conditions, but in itself it will not change the prevailing disadvantaged (subordinate) position of women. It may in fact reinforce the gender division of labor.

🔸 **Strategic Gender Interests/Needs:** Strategic gender interests/needs are those women identify because of their subordinate position to men in their society. They disclose issues of power and control and the gender division of labor. Strategic interests/needs may include, changes in the gender division of labor (women to take on work not traditionally seen as women's work, men take more responsibility for child care and domestic work), legal rights, an end to domestic violence, equal wages and women's control over their own bodies. They are not as easily identified by women themselves as their practical interests/needs, therefore, they may need specific opportunities to do so. Condition and Position: Development projects generally aim to improve the condition of people's lives. From a gender and development perspective, a distinction is made between the day-to-day condition of women's lives and their position in society. In addition to the specific conditions which women share with men, differential access means women's position in relation to men must also be assessed when interventions are planned and implemented.

🔸 **Condition:** This refers to the material state in which women and men live, and relates to their responsibilities and work. Improvements in women's and men's condition can be made by providing for example, safe water, credit, seeds. (Practical gender needs). Position: Position refers to women's social and economic standing in society relative to men, for example, male/female disparities in wages and employment opportunities, unequal representation in the political process, unequal ownership of land and property, vulnerability to violence (strategic gender need/interests).

🔸 **Transforming Gender Relations:** Changes in gender relations transform long-standing patterns; one change is acknowledged to bring others, and the nature and the degree of changes that occur in women's and men's lives as a result of successful interventions, explain why "transform" is the active construct chosen in this model. Transformation of this kind requires an understanding and parallel or concurrent attention to practical needs and strategic interests. The choice is not "one or the other"; the challenge is how to work with both --strategically, and practically.

🔸 **Transformatory Potential:** A gender analysis guided by this approach, applying the analytical framework to development programming, uses the interwoven framework of concepts to assess the transformatory potential of a given set of options -- which ones are most likely to ensure women get equal access to the resources they need to maximize their productive and reproductive contributions to their households and societies.

🔸 **Empowerment:** Empowerment is about people, both men and women. It is a "collective undertaking, involving both individual change and collective action". Women's empowerment means developing their ability to collectively and individually take control over their own lives, identify their needs, set their own agendas and demand support from their communities and the state to see that their interests are responded to. In most cases the empowerment of women

requires transformation of the division of labor.

- **Discrimination:** The Convention on the Elimination of all Forms of Discrimination Against Women (CEDAW), approved by the United Nations in 1979, states that "Discrimination against women shall mean distinction, exclusion, or restriction made on the basis of sex which has the purpose of impairing or nullifying the recognition, enjoyment or exercise by women, irrespective of their marital status, on a basis of equality of men and women, of human rights and fundamental freedoms in the political, economic, social, cultural, civil or any other field" Systemic Discrimination: Systemic discrimination is caused by policies and practices that are built into the ways that institutions operate, and that have the effect of excluding women and minorities.

Annex II. Resources

- DFID, (2002), *Gender Manual. A practical Guide for Development Policy and Practitioners,* UK, DFID, Social Development Division,
- EC, UNIFEM, ITC, (2009). *Training Module: Introduction to Gender Analysis and Gender Sensitive Indicators*. Gender Campus, Torino, Italy.
- GIZ (2011), *Gender Analysis. A Manual for the Gender differentiated design of technical cooperation projects and programmes*, Bonn, Germany.
- GIZ (2013), *Gender Analysis- Frequently Asked Questions*, Bonn, GIZ.
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- UN Develop Group & UN System Staff College (2014). *Frameworks for Gender Analysis*. Power Point. New York, USA.
- UNDP (3rd edition, 2007), *Gender Mainstreaming in Practice: A Toolkit. Part II & I.* Regional Bureau for Europe and the Commonwealth of Independent States (RBEC), Bratislava.
- UNDP (2013-2014), Gender Mainstreaming Made Easy, Volume I&II. Resource Handbook for all Staff. Country Office for UNDP Somalia.
- UNDP (2014a) *Gender Equality Strategy 2014-2017, The future we want: rights and empowerment.* New York, UNDP.
- UNDP (2014b), *Making Joint Gender Programmes Work. Guide for design, implementation, monitoring and evaluation*. New York, UNDP.
- UNDP (2015a). *Social Environmental Screening Procedure*. New York, UNDP.
- UNDP (2015b). *Gender Mainstreaming in Environment & Sustainable Development Project. A perspective from Asia-Pacific Region*. Guidelines for UNDP Staff.
- Gunwomen (2014). Gender Mainstreaming in Development Programming: A Guidance Note. New York, UN Women.
- Gunwomen, UN System Coordination Division (Last updated, June 2015); *Repository, Policies, Strategies and Action Plan son Gender Mainstreaming within the UN System.* New York, UNWomen.
- USAID, (2011). Tips for conducting Gender Analysis at the Activity and Project Level. EGAT/WID, Washington DC, USA.

Background to the assignment

A clear description of why a gender analysis is required should be elaborated and should include reference to previous studies (national reports on gender issues, sector-relevant supporting data, monitoring reports, evaluations, etc.) that identified gender inequalities in the sector, or other inputs that generated gender-related questions to be answered. It is important that the background information indicates clearly the kind of inputs required for the subsequent design (or redesign) of the deliverables, or what inputs from the gender analysis report are requested in terms of policy and procedural guidelines.

Study objectives

This section will state clearly what exactly will be studied under the gender analysis, including target groups, scope, etc., as well as specific research questions to be answered

Methodology

The TOR should broadly specify the research methods to be used.

Like explained before, a gender analysis should be conducted using participatory methods and collection of qualitative information as well as quantitative data disaggregated by sex. The TOR should also specify whether the person or team conducting the analysis would be working with other gender experts (e.g. national/international gender experts) or with sector specialists.

Qualifications of the researcher

For gender-sensitive participatory approaches, being able to communicate in the local language is important. Other relevant qualification and experience required often include:

- A post-graduate degree in social sciences or another relevant field (e.g. labour economics);
- Training in the field of gender and development – a good indication of whether or not the consultant has the relevant expertise;
- 5–10 years' experience of conducting gender studies;
- Publications or field reports on gender issues that credit the consultant;
- Ability to work in a team – this is essential for gender analysis work, as the consultant will have to liaise with many different groups at different levels, including perhaps policy-makers, managers, field workers, technical experts and others;

Source: EC (2006); DFID (2004)