



## Gender Analysis Guiding Notes (Draft, March 2009)

CARE Österreich (CÖ)



**CÖ has placed gender and women's empowerment at the core of all our work.**

In order to make sure that we share a common understanding of what a gender analysis is, and to facilitate the work of our own program and partner Country Office staff, CÖ has elaborated short guiding notes for the elaboration of relevant Gender Analysis<sup>1</sup>. They should be seen as support for the enhancement of our program quality, and an easy to use guide for organizing a solid gender analysis at different steps of program/project implementation.

In this paper you will find:

- 1) CÖs conceptual approach to women's empowerment and minimum programming Standards
- 2) What is a gender analysis
- 3) Why is a gender analysis important?
- 4) CARE Internationals "Women's Empowerment Analytical Framework" as reference
- 5) Some key elements of a gender analysis at different levels
- 6) General TORs for a Gender Analysis
- 7) Highlighting gender equality criteria at project/program evaluation stage
- 8) Other useful resources

### **1. CÖ's conceptual approach to women's empowerment and minimum programming Standards**

**CÖ considers gender equality as a means and an end.** We explicitly promote gender equality as our overall objective and perceive tackling inequality as a means to end poverty and as an end in itself. Discrimination should always be addressed through a gendered perspective, because gender is the most important factor to produce inequalities in all

<sup>1</sup> Most of the text is excerpted from: European Commission, EuropAid Cooperation Office: Toolkit on mainstreaming gender equality in EC development cooperation, Brussels 2004.

societies. Consequently, our strategy is to address gender, particularly the empowerment of women. Empowerment can be achieved through advocacy, supporting women's groups and through cultural, social, economic and political change, including addressing the distribution of power to promote gender equality.

**CÖ considers gender mainstreaming to be an essential tool** to help create institutions that integrate policies, plans and budgets that reflect women's as well as men's needs and contributions.

### **CÖ Internal Minimum Programming Standards (abbreviated):**

*It is intended that they will be applied to all new projects/programmes by the end of 2008 and that Memorandums of Understanding with CARE offices and partners in focus countries will include a commitment on them. These are supplementary to any required donor standards.*

(a) For all programmes:

- ✓ **All new programmes and projects must be based on a gender analysis**
- ✓ Projects explicitly state at least one gender equality result
- ✓ Indicators, implementation strategies, objectives of programmes and M&E should include gender aspects
- ✓ Programmes must work with gender responsive partners or provide gender awareness training to partners
- ✓ All projects collect sex disaggregated data

(b) For women's empowerment programmes

- ✓ Have a clear hypothesis (causal argument) for how empowerment will be facilitated or achieved
- ✓ Gender analysis and power analysis should be part of the design and/or inception phase
- ✓ Empowerment must be clearly defined and an "empowerment baseline" (for measuring the progress with regard to the envisaged theory of change) must be established
- ✓ Must include women in all actions and work with men strategically (affirmative action, engaging men)

## **2. What is a Gender Analysis?**

Gender analysis is the systematic attempt to identify key issues contributing to gender inequalities so that they can be properly addressed. Gender analysis provides the basis for gender mainstreaming and is described as **"the study of differences in the conditions, needs, participation rates, access to resources and development, control of assets, decision-making powers, etc. , between women and men in their assigned gender roles"**. Gender analysis is also needed to determine whether specific actions are needed for women or men in addition to mainstreaming activities.

Gender analysis should be conducted at all levels, from the grass roots (the micro level) through intermediate levels (meso level) such as service delivery systems, to the highest political levels (macro level), and across all sectors and programmes of development cooperation.

Gender analysis must be based on examination of statistics disaggregated by sex and qualitative information about the situation of men and women. Gender analysis usually involves examining existing data on the concerned population before deciding what other

methods need to be employed to obtain additional information. A wide range of sources should be consulted, including reports and studies from partner governments, NGOs, donors and academic sources. Additional data can be obtained by surveys, studies, rapid appraisal, focus group techniques and other empiric data gathering methodologies.

An analysis of gender issues must also recognize the other diversity issues which affect all members of society, such as age, ethnicity and socioeconomic conditions. Neither women nor men form a homogenous group.

A thorough gender analysis should reflect the ways in which all other cross-cutting issues (age, environment, ethnicity, rights) also impact on women and men. For example, older women of minority ethnic groups might be more disadvantaged than younger, educated women of higher socioeconomic status. The former may feel more solidarity with men of their own status than with the more privileged women.

A gender analysis needs to show the linkages between inequalities at different societal levels; e.g. a good gender analysis will show how a legal system of inheritance which stipulates that women inherit nothing or a lesser amount from their parents puts women at disadvantage in terms of economic opportunities throughout their lives.

### **3. Why is a Gender Analysis important?**

A gender analysis is important because gender inequalities need to be identified before they can be addressed either through mainstreaming actions or specific actions directed to women or to men.

A gender analysis provides information on the different roles of women and men at different levels, their respective access to and control over the material and non-material benefits of society, their priorities, needs and responsibilities.

On the basis of a thorough gender analysis it will be possible to understand current gender inequalities in a given situation or sector and to propose a range of measures to be included in the project/program to address and redress the situation.

A gender analysis is important when it is focused on institutions in order to determine how the nature of their services affects women and men, or how institutions themselves are also “gendered” in terms of recruitment practices, division of labor and decision-making. Policies and legislation can be analyzed in terms of gender outcomes or potential differential impacts on men and women.

### **4. CARE International’s “Women’s Empowerment Analytical framework”**

In 2006, CARE has finished a huge a strategic impact inquiry (SII)<sup>2</sup>, examining more than 1000 projects for women’s and girls empowerment in more than 30 research sites all over the world. CARE International deducted from this SII that there is a crucial core of empowerment sub-dimensions and indicators that merit attention in all women’s empowerment. Therefore, a gender analysis related research needs to take these dimensions into account:

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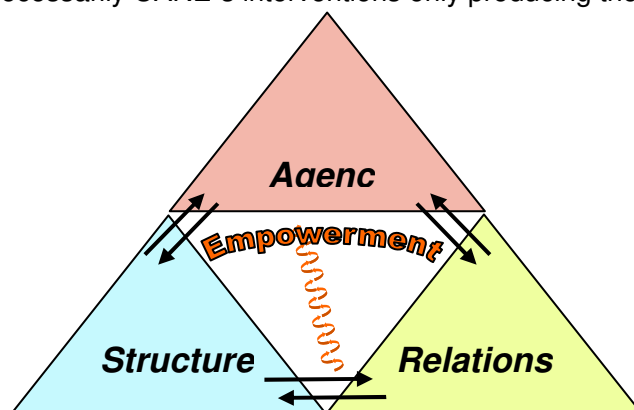
<sup>2</sup> Find data under:

<http://csp.emory.edu/maple/csp/CARE%20docs/Research%20Designs%20and%20Methods/methodological%20note%202005.doc>

Due to the results of SII, four crucial sub-dimensions must be fulfilled to achieve sustainable women empowerment:

Core Sub-Dimensions of Empowerment	Agency-Level Indicators <sup>3</sup>	Structural Level Indicators	Relational Indicators
Notions of self worth; dignity	1. Knowledge of rights and structures of gender inequality 2. Education Level 3. Changes in self-images	4. Equitable access to basic human services	10. Participation in civil society/solidarity groups and those groups' connections with other groups 11. Incidents of Violence Against Women and active prosecution of same 12. Influence on formal and informal decision-makers to make pro-women decisions 13. Male attitudes regarding gender roles and norms
Control and Influence over HH and Public Resources		5. Participation in political processes	
Bodily Integrity		6. Legal changes and/or enforcement of women's control of strategic resources	
Collective Effort/Solidarity		7. Pro-women changes in family/kin norms and institutions 8. Equal economic opportunity, including ownership/ control of strategic assets (land, labor, livestock, credit, home) 9. Pro-women state budgets and development policies	

CARE understands that if any CARE programme is having a sustainable impact on women's empowerment, it needs to be able to show positive changes in all 13 indicators displayed above. It is not necessarily CARE's interventions only producing those changes across all 13.



**Agency:** Women carrying out *own* analysis, making *own* decisions, and taking *own* actions. Every person has agency, every person analyses, decides, and acts. Empowerment focuses on how poor women can increase their agency.

**Structure:** Routines, patterns of relationships and interaction, and conventions that lead to taken-for-granted behavior; institutions that establish agreed-upon meanings, accepted ("normal") forms of domination (who "naturally" has power over what or whom), and agreed criteria for legitimizing the social order. Examples include kinship, economic markets, religion,

<sup>3</sup> The indicators are a mixture of effect and impact level measures. They may be quantified – if that makes sense in a particular site – or may be left as qualitative indicators and researched in that fashion.

castes and other forms of social hierarchies, educational systems, political culture, resource control/ownership dynamics, forms of organization, etc.

**Relationship:** Both agency and structure are mediated through relationships between and among social actors while, at the same time, forms and patterns of relationships are deeply influenced by agency and structure. Empowerment, in part, consists in individual women building relationships to claim and expand agency, to alter inequitable structures, so that they are able to realize rights and livelihood security.

#### **Several analytical frameworks<sup>4</sup>:**

There exist different analytical frameworks<sup>5</sup> for gender analysis. Very often consultants will use a combination of different frameworks. For us as CARE it is important, that within a gender analysis:

- ✓ the potentials for social change in direction to gender equality are always analyzed and not just static profiles elaborated.
- ✓ This means, that you need to watch out for finding your hypothesis of change reflected in the TORs and in the finished analysis.

#### **5. Some key elements of a gender analysis at different levels:**

##### **Micro Level (agency, household and community level):**

- ✓ What is the division of labour amongst women, men, young and old? Who normally does what? Have there been changes due to war, migration for labour, HIV/AIDS pandemic or other reasons?
- ✓ Are there gendered inequalities in access to resources, including new resources? Who has control over different resources, including new ones, resources from institutions, development projects or other outside interventions (governmental, firms, etc)?
- ✓ What are the implications regarding having or not having control over resources?
- ✓ Resources do include non-material resources such as time, knowledge and information, or relationships (social capital)
- ✓ What factors influence access to and control over resources (for example: age, sex, position in an organization, wealth, rural/urban location, educational level, networks and patronage)?
- ✓ At the community level, how are decisions made about different resources and activities? Are women enabled to participate in informed decision making, if yes how?

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<sup>4</sup> E.g. ILO: <http://www.ilo.org/public/english/region/asro/manila/gender/modwga.htm>

<sup>5</sup> You find different methods for gender analysis in the Oxfam Gender Training Manual, Oxfam UK and Ireland 1994. One well-known is the Moser method for program assessment, of the Harvard Analytical framework, which focuses on the gendered division of labour (activity profile) and the access to resources (access and control profile) and the determinants profile. The social relations approach has a focus on how individuals relate to each other, and what relative power and bargaining power they do have.

- ✓ At household level: who makes the decisions about the use of different resources and the activities of the household members? Who decides about the mobility of the household members?
- ✓ Are there indications for agents of change of gender roles? Are initiatives for change welcome or oppressed?
- ✓ Which rites de passage do women and men have to go through in their life cycle? (cultural steps to take through different initiation rites)
- ✓ How is marriage organized, do women have the right to choose their husbands freely? Is there a bride price system, or a dowry system? Is there a practice of early child marriage and if yes, due to which arguments?
- ✓ What happens to women and girls, if they do not (want) fit into the culturally apt (e.g. arranged) marriage patterns? Does this hamper their access to resources, inheritance, etc?

### **Meso level (structural + relational level)**

- ✓ Do service delivery structures (e.g. all civil service structures at this level – health, education, labour, transport, etc. – the police, the judiciary, etc) reflect gender balance in their membership and management? Do women and men have equal access to employment and services? Is equal treatment in terms of pay and benefit guaranteed for men and women?
- ✓ Do private sector businesses and institutions (including companies, banks, media, etc) reflect gender balance in their membership and management? Do women and men have equal access to employment and services?
- ✓ Is there occupational segregation of the labour market by gender, either horizontal or vertical?
- ✓ How is the participation of women and men in local governance organized?
- ✓ Are there any other culturally important decision-making bodies or structures (kinship, clans, tribal structures, etc.) which do influence people's lives? How are women's and men's voices represented and how are decisions taken and implemented?

### **Macro level**

- ✓ Have gender equality commitments have been made by the government in the context of international processes such as the Beijing process, the MDG process, or the ratification of CEDAW (Convention on the Elimination of all Forms of Discrimination against Women)? (for CEDAW check here: <http://www2.ohchr.org/english/bodies/cedaw/index.htm>)
- ✓ What are the concluding observations of the special procedures of the UN human rights system regarding the CEDAW reporting (also the Child Rights Convention is relevant) for special procedures and concluding observation of state reporting to the covenants check here: <http://www.ohchr.org/EN/Countries/Pages/HumanRightsintheWorld.aspx>

- ✓ Do national and sector policies reflect these commitments by their awareness of inequalities between men and women at different levels and the inclusion of means to address them?
- ✓ How do current policies, laws and regulations (e.g. voting rights, rights to inheritance and credit opportunities, rights to divorce and child custody, reproductive rights, etc.) impact differently on women and men?
- ✓ In national-level institutions (parliament, government ministries, universities, businesses) how are decisions made? How are women represented in the system? How are decisions taken?
- ✓ Is gender budgeting in place in parliament and/or local governments?
- ✓ Review the UNDP MDG reports on MDG 3 in a respective country; analyze the data of the Human Development and Gender Development /Gender Gap data available.

## 6. General TORs for a gender analysis:

The exact content of the TOR for a gender analysis will depend on the sector, the scope of the project/program and the assignment in question.

### Background to the assignment

A clear description of why a gender analysis is required should be elaborated and should include reference to previous studies that highlighted gender inequalities in the sector, or other inputs that brought forth gender-related questions requiring answers. Thus the background to the gender analysis assignment should reference national reports on gender issues, sector-relevant supporting data, monitoring reports, evaluations, etc.

It is important that the background information indicates clearly what kind of inputs are required for the subsequent design (or redesign) of the aid delivery/development cooperation method, or what inputs from the consultant's report are required in terms of policy and procedural guidelines.

### Study objectives

This section is very specifically related to the project/program. Active verbs should be used to describe objectives. What exactly will be studied under the gender analysis should be very clearly stated, included target groups, scope, etc.

### Methodology

Ideally, a gender analysis should be conducted using participatory methods and obtaining qualitative information as well as quantitative data disaggregated by sex. The TOR should broadly specify what research methods are to be used by the consultant.

For the desk study (=document reading and analysis) , the reading of the following documents must be included as one of the minimum requirements

- ⇒ CARE ÖSTERREICH'S Conceptual Approach to Gender Equality & Women's Empowerment, Vienna October 2008.
- ⇒ Care International Gender Policy
- ⇒ CARE International's Women Empowerment Concept
- ⇒ SII – regional reports



The TOR should also specify whether the consultant will be working with other gender experts or sector specialists.

### **Expertise required**

For gender-sensitive participatory approaches, being able to communicate in the local language is very important (either the consultant him/herself or through a reliable translator).

Other relevant qualification and experience required often will include:

- a post-graduate degree in social sciences or another relevant field
- training in the field of gender and development – is a good indication of whether or not the consultant has the relevant expertise
- normally 5-10 years experience in conducting gender studies
- publications of 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 such as policy makers, grass-root women's organizations, field workers, technical experts, etc.
- the ability to communicate non-verbally and to decipher hidden meanings in response is important; good observation techniques are advantageous
- Knowledge about women's human rights is essential, as well as experience in working about diversity and non-discrimination
- Cultural sensitivity and respect

### **Reporting requirements**

The consultant may also complement electronic reports with visual images from the results of participatory rural appraisal techniques, include photographs or other materials that visually illustrate gender equality issues.

### **Workplan and timetable**

Gender as such is cross-cutting to many sectors and activities. Conducting a gender analysis means that a consultant needs to familiarize her/himself with all aspects of a sector or a programme or project. Macro level policies need to be analyzed, institutional service delivery mechanisms analyzed in terms of gender sensitivity, and field level realities studied and presented in a format that is helpful to the development activity.

Therefore, the time allocated should be reasonable and not too short. It is time and cost efficient to allocate time prior to the arrival in the field for the desk study (=review of gender relevant project/program documents, CARE Austria and CARE International papers, and other sector- or country specific available materials).

## **7. Highlighting gender equality criteria at project evaluation stage**

The gender equality issues to be addressed at this stage are summarized below:

Task: Gender-sensitive evaluations ensure that the project is evaluated in terms of

**Relevance** to gender equality issues: were the project objectives identified with respect to gender equality issues appropriate to the problems and to the physical and social environment in which the project operated? Was the treatment of gender equality issues throughout the Project logical and coherent? Were the adjustments made to reflect any changes occurring in gender roles and relationships because of factors external to the project?



**Efficiency** with respect to gender equality. This aspect of the evaluation addresses the question whether or not project results for women and men have been achieved at reasonable cost, and whether or not costs and benefits have been equitably allocated and received.

**Effectiveness** in reaching gender equality objectives: This aspect of the evaluation includes an assessment of the contribution made by the results to the achievement of the project/program purpose, and the way in which assumptions have affected project/program achievements. This aspect of the evaluation also includes a specific assessment of the benefits accruing to particular stakeholders and target groups, in each case disaggregated by sex.

**Impact** of the project/program on the wider social environment, and its contribution to wider policy or sectoral objectives with respect to gender equality.

**Sustainability** of the project with respect to the likelihood of achievements in gender equality being sustained after the flow of external funding has ended. This aspect of the evaluation addresses such issues as ownership of the project/program by beneficiaries and partners, the extent to which the strategic needs of women and men have been addressed through the project, and the extent to which capacity for gender mainstreaming through the project has been built.

## 8. Further useful links and resources for research:

EuropeAid (2004): Toolkit on mainstreaming gender equality in EC development cooperation, Brussels, EC. <http://ec.europa.eu/europeaid/sp/gender-toolkit/index.htm>

Beck, T. and Stelcner, M: (1997): Guide to Gender Sensitive Indicators, Gattineau. CIDA 8 (English and French) [http://www.siyanda.org/static/beck\\_stelcner\\_indicators.htm](http://www.siyanda.org/static/beck_stelcner_indicators.htm)

BRIDGE (2007): Gender and Indicators, Cutting Edge Pack, Brighton BRIDGE/IDS. [http://www.bridge.ids.ac.uk/reports\\_gend\\_cep.html#Indicators](http://www.bridge.ids.ac.uk/reports_gend_cep.html#Indicators)

Human Development Report (1995): Gender and human development, New York: UNDP <http://hdr.undp.org/reports/global/1995/en/>

Klasen, S. (2006) Special Issue: Revisiting the Gender – related Development Index (GDI) and Gender Empowerment Measure (GEM), Journal of Human Development, Vol. 7.No.2, July 2006, New York: UNDP

Bhirdikar, K. Earl, S., Khot S., Kulkarni, S., Hay, K. and Indaputkar S. (2005): How a use and learning oriented planning, monitoring and Evaluation System evolved in the Swayamsiddha Project, Pune: BAIF Development Research Foundation. [http://www.baif.org.in/aspx\\_pages/research\\_opportunities.asp](http://www.baif.org.in/aspx_pages/research_opportunities.asp)  
[http://www.idrc.ca/uploads/user-S/11592100393M\\_E\\_Report\\_Version\\_21.pdf](http://www.idrc.ca/uploads/user-S/11592100393M_E_Report_Version_21.pdf);