

## Introduction to gender analysis concepts and steps

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### Overview

During program and project design, gender analysis is the process of assessing the impact that a development activity may have on females and males, and on gender relations (the economic and social relationships between males and females which are constructed and reinforced by social institutions). It can be used to ensure that men and women are not disadvantaged by development activities, to enhance the sustainability and effectiveness of activities, or to identify priority areas for action to promote equality between women and men. During implementation, monitoring and evaluation, gender analysis assists to assess differences in participation, benefits and impacts between males and females, including progress towards gender equality and changes in gender relations. Gender analysis can also be used to assess and build capacity and commitment to gender sensitive planning and programming in donor and partner organisations; and to identify gender equality issues and strategies at country, sectoral or thematic programming level.

There a number of different frameworks for undertaking gender analysis. Some of these have been developed in Northern countries (Moser 1993; Overholt et al. 1985), and others have been developed and adapted by development practitioners from the South (Parker 1993; Longwe 1991; Kabeer 1994). This article outlines the essential steps that need to be addressed to undertake gender analysis for each of the different levels referred to above, and draws on concepts from a number of different frameworks.

### Summary of key gender analysis steps

1. **Collect sex disaggregated household, workplace and community data/information** relevant to the program/project for each area below.
2. Assess how the **gender division of labour and patterns of decision-making** affects the program/project, and how the program/project affects the gender division of labour and decision making.
3. Assess who has **access to and control over resources, assets and benefits**, including program/project benefits.
4. Understand women's/girls' and men's/boys' different **needs, priorities and strengths**.
5. Understand the **complexity of gender relations in the context of social relations**, and how this constrains or provides **opportunities** for addressing gender inequality.
6. Assess the **barriers and constraints** to women and men participating and benefiting equally from the program/project.
7. Develop **strategies to address barriers and constraints**, include these strategies in program/project design and implementation, and ensure that they are adequately resourced.
8. Assess **counterpart/partner capacity** for gender sensitive planning, implementation and monitoring, and develop strategies to strengthen capacity.

9. Assess the potential of the program/project to **empower women**, address strategic gender interests and **transform gender relations**.
10. Develop **gender-sensitive indicators** to monitor participation, benefits, the effectiveness of gender equality strategies, and changes in gender relations.
11. Apply the above information and analysis throughout the program/project cycle.

### **Step 1: Collect sex-disaggregated data/information**

This refers to the differentiation by sex of statistical data and other information and is sometimes called gender-disaggregated data. This means that we must count both males and females when gathering information for planning, implementing, monitoring and evaluating development activities. Disaggregating information by sex is a basic good practice requirement for gender-sensitive programming. Without disaggregated information, it is difficult or impossible to assess the different impacts of development activities on males or females. It is important to disaggregate data not only by sex, but also by age (girls and boys, older men and women), race, ethnicity, caste and any other socioeconomic group which may be affected positively or negatively by a development activity.

There are many ways that development workers can gather sex-disaggregated information. Data collection methods and the quantity of data required will vary according to a range of factors, including the sector and type of development activity, the scale of the activity, the resources and time available for data collection during design, implementation and evaluation, and the institutional context. While there are now many sources of quantitative data on the status of women and girls, up-to-date and relevant information specific to the location and activity can sometimes be difficult to get. Sex disaggregated qualitative information based on consultation with key stakeholders and local women's groups is also essential. Participatory methods may provide opportunities to hear from both women and men separately (for example, participatory ways of gathering information on the gender division of labour, or on access to resources), and for women and men to hear each other's perspectives.

The following factors may influence the accuracy and coverage of data:<sup>1</sup>

- **Who is present:** In some cultures women will respond very differently to questions about their economic and social activities, and their views about gender relations if men are present. If men answer questions first, women may remain silent, even if they disagree, or if inaccurate information is given.
- **Time of day, season and location:** Women may not be available at certain times of day, and men may be less likely to be present at other times. It is important to choose both a time and place which is convenient for women, for individual and group interviews or participatory information-gathering exercises. Women and men may be less available during peak labour periods, such as harvesting or transplanting times.
- **Who is the facilitator/interviewer:** In some cultures and situations, responses to questions will be more accurate if women gather information from women. Training and supporting beneficiaries to collect and interpret data is also one way of involving women in project planning, implementation and monitoring, and may increase the accuracy and quality of data and its analysis. Class, age, ethnic background and occupation may also influence peoples' responses. It may be necessary to monitor whether these factors are introducing bias.

- **Language difficulties:** Men and women may have different proficiency in national (as distinct from local or ethnic) languages, particularly where gaps in education and literacy between males and females are significant.
- **Collect information on all relevant work:** Overlooking unpaid and subsistence work will result in under-reporting and misrepresentation of both women's and men's workload. Without this information, it can be difficult to identify the constraints which may face them in participating in or benefiting from development activities. Much of women's work is under-valued or 'invisible' to men and outsiders. Typically, men may not give accurate information about what women do, how long it takes to do it, where the work is done, or who benefits from different activities.
- **Local women's organisations:** Women's organisations and groups can be accurate sources of information about the gender division of labour, patterns of decision making, access to resources, women's and men's needs, priorities and strengths, how gender relations are changing, and the factors causing changes in gender relations. Often, these organisations have a rich knowledge of how current development activities and trends are helping or hindering women and men. With adequate resources, they can be effective catalysts for engaging the participation of women, men, boys and girls.
- **Cross-check data:** It is always necessary to cross-check data for accuracy and bias, including gender bias, regardless of the data collection method used. Local women's groups and local female researchers may be good sources for cross-checking, as well as other key community informants. Cross-checking may assist with analysis of data, and may indicate differences in perception about social and economic conditions, rather than actual inaccuracy in data collected. Using a range of reliable informants knowledgeable about the target group and women's and men's experiences is critical.
- **Technical and sectoral expertise:** It is helpful to have a social scientist with expertise in participatory data collection and gender analysis on design, implementation and evaluation/review teams. However, it is just as important for each team member to be responsible for collecting and analysing sex-disaggregated information in their own sector or area of expertise.

## Step 2: Assess the gender division of labour and patterns of decision making<sup>1</sup>

This step in the gender analysis process describes who does what, within the household, community, workplace, organisation or sector. Important issues to consider include:

- **What work is done, and by whom** (female and male adults, elders and children)? One good rule of thumb is to ask how the gender division of labour will affect the implementation of program/project activities; and how these activities are likely to affect the gender division of labour.
- Different types of work to consider are: **productive (formal and non-formal sectors), reproductive, essential household and community services, and community management and politics.** It is also important to explore **who makes decisions** about different types of work, and how this is changing. For example, in the education sector, it is important to know in which areas and at what levels females and males predominate as learners, teachers and decision

makers, and why. In the health sector, women are often traditionally responsible for providing basic health care in the family and community. It is important to know how men and women are involved in the provision of health services (formally and non-formally), and how the gender division of labour, responsibility and decision making in the family impacts on women's and men's health. Decision making about reproduction, about who in the family is resourced to go to health centres, tolerance of violence against women, and the physical burden of work can greatly influence women's and girls' health. Understanding decision making patterns can also provide insight into who has control over labour in the community.

- **How much time is needed** to undertake each activity, and when is the work done? This information helps to identify periods when there is a high demand for labour, so that an assessment can be made of any extra demands that project inputs will make on women, men and children. This is particularly important for rural development projects, where the scarcest resource for low-income women is time. For example, the different domestic and productive workload of girls and boys has been identified as an important factor in both enrolment and retention rates at school, as well as in educational achievement.
- **Where does each activity take place** (for example, home, village, marketplace, fields, urban centre or rural area, and how far away from the household)? This gives insight into female and male mobility, and allows an assessment to be made of the impact of the program on mobility, method of travel, the travel time needed to accomplish each activity, and potential ways of saving time. For example, for women to participate in training activities, timing and location needs to be carefully considered. In a police project, it is important to know whether women are stationed in rural areas, and whether they are primarily assigned to office-based activities.
- It is important to consider all the above **for each socioeconomic or ethnic group** targeted by the program/project, or affected by the program/project. A good gender analysis is undertaken within the context of a broader social analysis.
- With most projects and programs, it is also important to have a **sex-disaggregated employment profile** of the partner organisation.

### **Step 3: Assess access to and control over productive resources, assets and benefits**

This part of gender analysis describes who has what, within the household, community, workplace, organisation or sector, including who has power. Questions to be asked include:

- Who has **access** to productive resources and assets such as land, forests, water supplies, equipment, labour, capital, credit, new technology and training?
- Who has **control** over how these resources and assets are used, and over who uses them? It is important to distinguish between access to these resources (who uses resources informally or traditionally) and control or decision making power.
- Who belongs to **formal or informal groups or organisations**, who gets mentored or promoted?

- Who **benefits** from the product of women's and men's labour, and who benefits from development activities and education and training opportunities? Questions to ask include:
  - Who benefits from income earned and spent? For example, cash cropping projects often rely on the unpaid family labour of women and girls, but women are often less likely to control or have access to income from cash crops.
  - Who owns and uses any assets or goods created?
  - Who gains formal or informal political power, prestige or status?
  - Who has access to services, for example health and education, and what factors determine access? For example, the location of facilities, and the attitudes of service providers, may influence women's access to health services.
- Who has **access to program/project resources**, who has access to information from the project/program, and who participates in project management processes?
  - Project participation and consultation processes may be designed to enhance women's and men's access to information about the project and the resources which it offers. For example, the establishment of project implementation groups (such as water user groups, credit groups or farmer co-operatives) may determine who knows about the program, and who gets control over its resources.
  - How information is distributed and to whom, may determine who has access to training opportunities by a project.
  - Formal education prerequisites for education and training may impact on men and women very differently.
  - These factors will have an impact on women's and men's current productive activities and will often change existing gender relations.

For example, **in emergency relief and post-conflict situations**, it cannot be assumed that women will receive equal access to resources unless this is specifically planned for. Women may also raise different priorities for resources than those identified by the male leadership of displaced persons. For example, women in Rwandan camps in Tanzania identified a range of priorities and concerns regarding access to resources once they had gathered together in their own groups, such as how to get their proper share of food, the need to provide extra food and support to women caring for unaccompanied children, the need to ensure that single mothers and widows also receive resources, and the need to provide recreation and schooling for children (Woroniuk et al. 1997).

#### **Step 4: Understand differences in needs and strengths**

It is not unusual for men and women to have different perceptions of their needs and strengths. They may also have different ideas about who does what, who uses what resources, and who controls resources or makes decisions in other important areas of life. Women and men may also have different views about gender relations, how they have changed already, and how they should change in future.

Insights into women's/girls' and men's/boys' needs and strengths may be gained from finding out about the gender division of labour, use of and control over resources, and patterns of decision making. Consultation with participants, in a way which allows both women's and men's voices to be heard, is essential.

## **Step 5: Understand the complexity of gender relations in the context of social relations**

Recognising that development programming occurs in a complex and changing social context, this aspect of gender analysis considers social, cultural, religious, economic, political, environmental, demographic, legal and institutional factors and trends, and how they will impact on the program/project. Questions to be asked include:

- How will these factors and trends influence and change the gender division of labour, women's and men's access to and control over resources and benefits, and other aspects of gender relations such as decision making?
- How will these factors and trends constrain or facilitate the program/project, and the likelihood of successfully achieving objectives?
- How might the program influence these factors and trends, either positively or negatively?
- Which factors are changing and why, and which are very difficult to change?

There are many forms of discrimination, which result in violation of basic human rights to both females and males of all ages. It is important to remember that women face multiple barriers through different stages of their lives, and to understand the different types of discrimination that affect both males and females.

This analysis of social context can help to identify assumptions and risks in the logical framework matrix. Both women's and men's experiences and perspectives need to be considered when identifying critical planning assumptions and risks. Project objectives or methods may need to be modified in the light of these factors. For example:

- The experiences of boys and girls within the education system need to be considered when identifying factors which contribute to access to education, and educational outcomes.
- Demographic trends such as male migration may mean there are large seasonal variations or long-term changes in the numbers of households supported solely by women. If so, assumptions about the availability of women's and men's labour for program activities may need to be reconsidered. Such factors may also affect boys and girls access to schooling.
- Cultural factors restricting women's and girls' mobility may mean that services (for example, health, education or credit services) are under-utilised if they are located outside the immediate locality.
- For cultural and religious reasons, it may be important to establish separate groups for women and men at the community level. Training and consultation may need to occur separately with women and men, and female extension agents and community workers may be required.
- Legal factors and customary practices may make it very difficult to transfer resources directly to women (such as ownership of land or hand pumps, or access to credit).

Changing attitudes, economic circumstances and trends **may provide opportunities for improving women's social, economic and legal status**. Analysing such factors and trends may assist planners to identify areas where the program can address both women's practical needs, as well as their strategic gender interests (as defined by women themselves) to redress current inequalities in the gender division of labour, and in women's access to and ownership of productive resources. Work in post-conflict

areas and in humanitarian/emergency relief situations may also present opportunities for advancing gender equality.

### **Step 6: Assess barriers and constraints to women and men participating and benefiting equally in the program/project**

Key constraints and barriers to men's and women's participation as beneficiaries and decision makers need to be identified during project design for all components and key activities, based on information gathered in the steps above. This is an essential step in the process of gender and social analysis which is often missed. Who benefits and participates, how and why/why not, also needs to be monitored closely during implementation.

### **Step 7: Include and resource strategies to promote gender equality in project design and implementation**

Strategies and activities need to be identified to overcome barriers to women and men participating and benefiting. It is important to assess which constraints, barriers or imbalances can realistically be addressed over the life of the project. It is also essential to ensure that strategies are adequately resourced and monitored. For example, gender-sensitive communication, consultation and participation strategies need to be developed and tested. Project staff need to consider how and when contact is made with target groups, and who may be excluded directly or indirectly by the communication strategies used.

### **Step 8: Assess counterpart/partner capacity for gender-sensitive planning, implementation and monitoring**

Partner capacity for gender-sensitive implementation is still often overlooked. For most bilateral and multilateral development projects, the counterpart agency has already been decided long before implementation commences. Nevertheless, an assessment of counterpart institutional capacity to implement gender-sensitive activities is essential as early as possible in the project cycle, so that appropriate strategies for strengthening this capacity can be explored and costed (Hunt 2000).

### **Step 9: Assess the potential for the program/project to empower women and address strategic interests**

It is useful to distinguish between practical gender needs and strategic gender interests which may be addressed during program/project implementation:<sup>1</sup>

Practical gender needs are the immediate and practical needs women have for survival, which do not challenge existing culture, tradition, the gender division of labour, legal inequalities, or any other aspects of women's lower status or power. Projects which focus on practical gender needs may make it easier for women and girls to carry out their traditional roles and responsibilities, and relieve their daily burden of work. These practical needs are shared by all household members. However, because women are generally responsible for providing these needs for the family, they are often more easily identified by women as their highest priority needs.

Strategic gender interests focus on bringing about equality between females and males, by transforming gender relations in some way, by challenging women's

disadvantaged position or lower status, or by challenging and changing men's roles and responsibilities. Women may not always be able to articulate their strategic interests. It is important to have discussions with women about their role and place in society, their rights, and how they would like things to change. It is equally important to have discussions with men on these issues. Strategic gender interests may express women's and men's long-term aspirations for equality.

It is possible to address women's strategic interests by: working with men as well as women (for example, by raising men's awareness of the impact of their sexual behaviour and power inequalities on women's health); focusing on practical needs in an empowering way, which also promotes strategic interests (for example, by involving women in decision making in areas where they do not traditionally have a role or power, such as in the management or maintenance of water supplies); and using practical needs as an entry point for raising awareness about inequality and rights, or about women's and men's roles and responsibilities and their long term interests.

What is strategic in one social and cultural context may not be strategic in other contexts. Some examples of strategic gender interests are women's rights to: live free from violence; have equal land tenure; have equal control over other productive resources such as credit, forests, water supplies; be involved in decision making; and have equal educational and training opportunities and outcomes.

### **Step 10: Develop gender-sensitive indicators**

Gender sensitive performance indicators are essential for monitoring the impact of activities on males and females, and on changes in gender relations. To be gender sensitive, indicators need to:

- require the collection of sex-disaggregated information wherever possible on who participates and benefits;
- assess whether the program/project has different benefits and impacts for males and females, and assist us to analyse why these differences between women and men occur;
- assess whether the program/project is bringing about a change in gender relations, and assist us to analyse how gender relations are changing (positively or negatively), and how this impacts on the achievement of overall program/project objectives; and
- involve both women and men in developing indicators, and in collecting and analysing information.

It is important to include a mix of both quantitative and qualitative indicators, in order to assess benefits, changes in gender relations and other impacts. Reporting on indicators should always be accompanied by qualitative analysis, to ensure that data is interpreted correctly.

For example, a quantitative gender sensitive indicator for a HIV/AIDS program may measure the number of males and females who attend awareness-raising workshops. Qualitative indicators may assess whether females and males can identify ways to protect themselves from HIV infection, whether they are able to talk about and use condoms with sexual partners, and whether there is increased community acceptance of women and men living with HIV/AIDS. In a water and sanitation project, a quantitative



indicator may be the number of women represented on water committees. Qualitative indicators may assess whether women have actively participated in management and decision making on water committees; or assess men's and women's views on the appropriateness of the location and type of water facility provided.

### **Step 11: Apply information and analysis through the program/project cycle and to all major program/project documents**

This requires the formulation of a range of questions which will vary according to the nature and sector of the project/program, and the social and development context. Many agencies now have useful tools to assist with this process which are available electronically (for example, AusAID 1997 and DAC nd).

**Each of the above steps needs to be considered throughout the activity cycle,** beginning with country and sectoral programming, and continuing through project design, implementation and evaluation. For example, during country and sectoral programming, an assessment of partner government capacity and commitment to gender sensitive programming is critical, along with other aspects of gender analysis. During project design, the gender analysis process is not complete until project-specific operational strategies and gender-sensitive indicators are devised to ensure that both men's and women's needs and priorities are systematically addressed. During implementation, as information is collected to verify indicators, it is important to be prepared to change the way we carry out programs/projects if we find that there are unintended or harmful effects, or if we find that women's or men's needs or priorities are being overlooked. This may require changes to objectives, as well as to activities.

Gender perspectives need to be systematically integrated into all major project documents, rather than confined to a separate section of a document, or to a separate Gender and Development Strategy. It is particularly important that logframes adequately reflect social and gender analysis undertaken during design. Explicit references to gender equality outcomes, or to the benefits to be gained by women and men, are needed in the first column of the logframe, in the statement of the goal, purpose, objectives or outputs. In addition to gender-sensitive indicators, means of verification need to ensure that both women's and men's voices are heard. Planning assumptions and risk assessment also need to consider gender dimensions.

### **Conclusion**

Gender analysis is most useful when it is applied routinely to all aspects of program and project planning, implementation and review (rather than as an after-thought or 'add-on'); when it is undertaken in a participatory manner; and when it is applied to program and project objectives, so that they are modified in response to the needs and interests of both women and men. One major challenge for the future is to ensure that gender analysis is integrated into a broader social analysis of programs and projects, along with sustainability and poverty analysis.

### **Acknowledgment**

This article adapts material from various gender training notes produced by the author over many years, including Hunt, Juliet 2003, *Gender and Development throughout the Project Cycle: Course Workbook and Materials*, IDSS Professional Development Program, Melbourne.

## Notes

1. Some of these tips are drawn from Evans 1992.
2. Sections 2, 3, 5 and 11 are steps in the Gender Analysis Framework and include original material as well as adaptations from Overholt et al. 1985.
3. This section is adapted from Moser 1989 and Moser 1993.

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