PROMOTING GENDER EQUITY & SOCIAL INCLUSION IN GLOBAL DEVELOPMENT:
A Practical Tool for Researchers & Development Workers

ACKNOWLEDGEMENT

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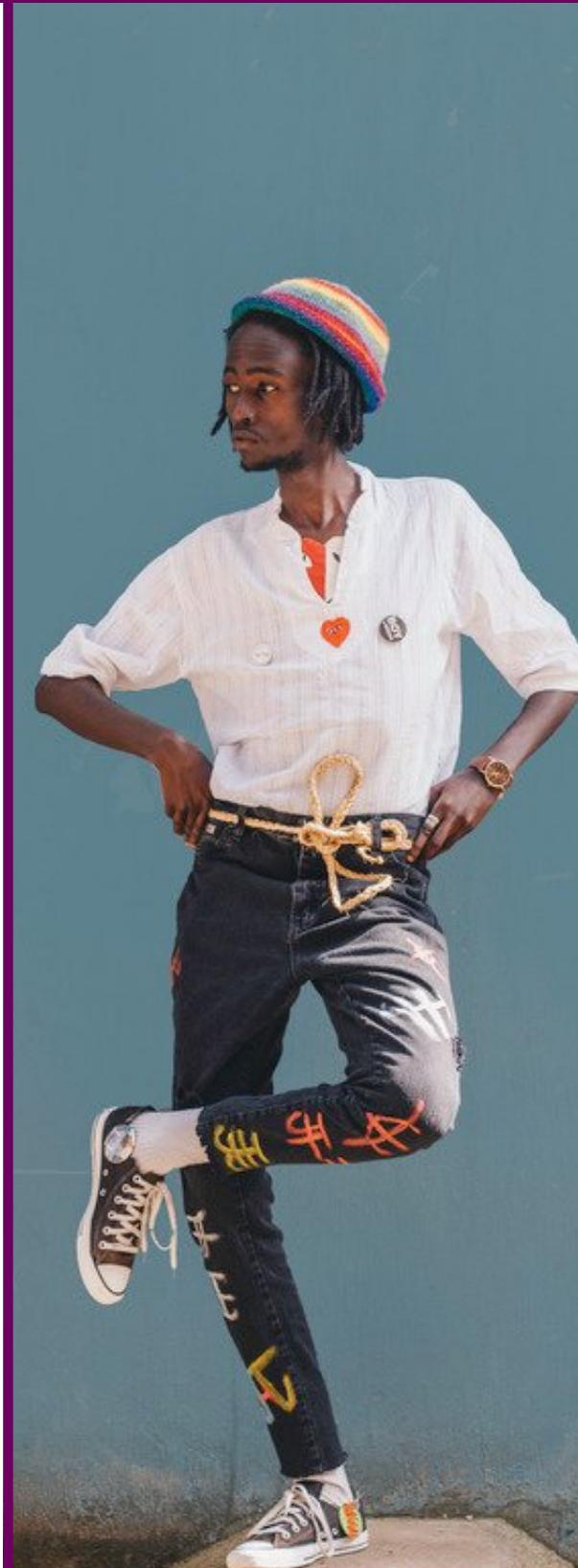
Key Definitions

Social differentiation — The ways in which people divide and categorize their social world, such as gender, caste, age, or physical ability. Individuals can embody multiple points of social differentiation that can affect how they experience inclusion or exclusion within a given society (e.g. an elderly disabled woman from a minority ethnic group).

Inclusivity — The practice of providing equal access to opportunities and resources for people who might otherwise be excluded.

Gender — Socially constructed roles and expectations associated with what it means to be a man or woman in a particular society.

Sex — The biological and physiological characteristics that define men and women.

Disaggregate data — Data that is collected and analyzed in ways that acknowledges social differentiation.

Population of interest — The population or group which is the focus of a given project, typically the participants. These participants usually provide a respresentative sample of a larger population or sub-population.

Social inclusion — the process of improving the terms on which individuals and groups take part in society.

INTRODUCTION

This tool is intended to increase awareness and acknowledgment of inclusive practices in various sectors and research settings. Centered around a gender inclusion continuum, it provides practical suggestions to encourage more equitable outcomes in your research and global development practices.

Context

This tool is intended to increase awareness of opportunities to incorporate more inclusive practices and is not designed to be used as a scorecard. It aims to promote self-assessment and planning in order to increase a project's efficiency, while also ensuring that the project takes into consideration the unique needs of different groups within the total population. The tool has been designed to assess current programs as well as to plan new initiatives. It is also intended to assist both research and development practitioners in developing more inclusive practices. While the authors recognize the differences between development work and research, this tool uses the term "project" to refer to both. We trust that users of this tool will be able to adapt the concepts shared in this tool to their work, regardless of their level of expertise and previous work in gender and inclusivity.

Sustainable Development Goals (SDGs)

This tool is intended to prepare researchers and development practitioners to apply the concepts of equality, inclusivity, and human rights articulated in the SDGs to their work.

The *2030 Agenda for Sustainable Development* was adopted by all United Nations Member States in 2015 to build upon the momentum of the Millennium Development Goals (MDGs) and while the MDGs did take the first step toward unifying the priorities of countries and development institutions, shortcomings were also identified. One such example was that the failure to consider the additional needs of children with disabilities meant that achieving the target of "ensuring high-quality education for all" would not be attainable.

The 2030 Agenda was developed with a more inclusive lens and outline 17 Sustainable Development Goals (SDGs) as an urgent call to action. These new goals placed a higher emphasis on including people from harder-to-reach groups, those often excluded from mainstream initiatives, and made commitments that guaranteed equitable access to development programming for all people (explicitly mentioning people with disabilities) and that this was a necessary condition for the realization of human rights.

Diversity

It is important to note that while gender is the focus of this tool, owing primarily to the vast inequities in access and power attributed to gender despite the roughly equal number of men and women in societies, it is only one of the many categories of diversity. The many forms of diversity in the communities in which we live and work should also be considered in the differences among individuals attributed to the following:

- Gender identity
- Disability
- Culture
- Socio-economic status
- Sexual Orientation and/or identity

- Race/ethnicity
- Family roles & responsibilities
- Generation/age
- Rural/urban residency
- Marital status

To gain a more complete understanding of the complexities of the communities in which you are working, you should also consider how these various identities intersect to create a variety of lived experiences.

Additional references for incorporating diversity into international research projects can be found in the references section.

Gender Inclusion

Gender-responsive research can be defined as an approach to research that considers and incorporates the needs, realities, and constraints of all genders, ensuring that everyone can participate and benefit (Nelson & Huyer, 2016; Najjingo-Mangheni et al, 2017).

Many funders of development work set their own goals for gender equality within the programs that they fund. For example, USAID's Gender Equality and Women's Empowerment Policy outlines their objectives as: 1) Ensure projects do not exacerbate or perpetuate gender and other social disparities; 2) Reduce disparities where possible; and 3) Empower women, girls, and members of traditionally disadvantaged groups.

The integration of gender into projects is often explained as a continuum ranging from projects without consideration for gender to projects that deeply examine and analyze structural gender issues. For the purposes of this tool, we consider four levels: **gender-unaware**, **gender-conscious**, **gender-responsive**, and **gender-transformative**.
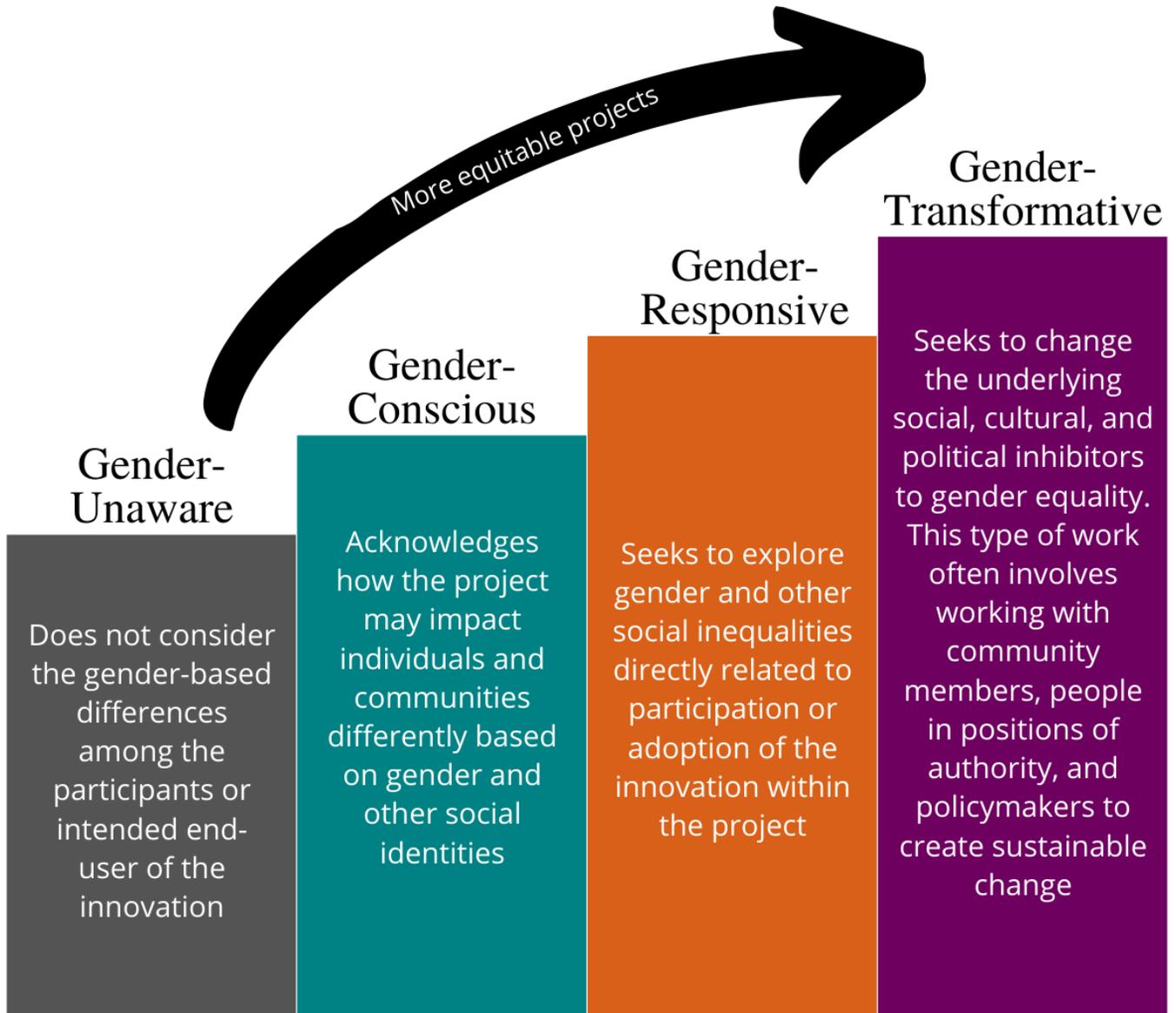
Disability Inclusion

Although it is difficult to come by comparable global statistics, owing in part to differing definitions and concepts of disability, the World Health Organization estimates that 15% of the global population (approximately 1.5 billion people) lives with some form of disability. They also estimate that approximately 80% of the total global population of people with disabilities live in the global south.

The United Nations Convention on the Rights of Persons with Disabilities (2006) aims to provide the framework for a more universal understanding of disability. Ratified by 182 states, it states: "Recognizing that disability is an evolving concept... Persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others." (Preamble & Article 1).

Gender Equality Continuum for Global Development Projects

More equitable projects

Gender-Unaware
Does not consider the gender-based differences among the participants or intended end-user of the innovation

Gender-Conscious
Acknowledges how the project may impact individuals and communities differently based on gender and other social identities

Gender-Responsive
Seeks to explore gender and other social inequalities directly related to participation or adoption of the innovation within the project

Gender-Transformative
Seeks to change the underlying social, cultural, and political inhibitors to gender equality. This type of work often involves working with community members, people in positions of authority, and policymakers to create sustainable change

PLANNING
PROJECTS

We use the term "planning" to refer to the initial idea generation stage of the project. In this phase, incorporating gender-responsiveness involves including gender considerations into the priorities of the research, such as the selection of sites or samples, setting goals and objectives, and the project team's composition.

Using Gender Analysis to Set Priorities

At the beginning of the planning phase, researchers and practitioners need to understand the target audience, relevant stakeholders, and local community. This requires an analysis of the "who".

A gender analysis should ask:

- who **has** what and why,
- who **does** what and why,
- who **makes decisions** and why, and
- who **needs** what and why.

A gender analysis is valuable in determining the cultural and socio-economic context of the location in which the study is being conducted (Nelson & Huyer, 2016). This analysis examines different barriers between men and women; the needs, interests, and available opportunities; power dynamics in the community and the home; and where information will be sourced (Manyiire & Apex, 2013; Nelson & Huyer, 2016). Wherever possible, a gender analysis should be conducted using participatory methods and ask questions that are formulated through the consideration of gender relations.

IDENTIFY THE POPULATION OF INTEREST

In international research, it is important to identify and understand the intended end-user (also known as the adopter) of the innovation or findings from your project.

GENDER-UNAWARE

Identifies the population of interest and intended adopters broadly without any social differentiation.

GENDER-CONSCIOUS

Identifies the population of interest and collects key demographic information from local sources (may include but is not limited to age, gender, land ownership status, ethnicity, education level, or socioeconomic status). This type of work identifies the gender of the adopter but does not consider the contextual factors or impacts.

GENDER-RESPONSIVE

Works with community participants and local experts to explore the roles within the system of focus, specifically seeking to understand the roles of different genders in various industries or the gender of the adopters of the innovation.

GENDER-TRANSFORMATIVE

Works with community participants and local experts to introduce solutions to address barriers to participation or other disadvantages experienced as a result of gender.

CASE STUDY: Integrated WASH Response & Prevention of Gender-Based Violence in South Sudan

Through the USAID-funded Integrated Wash Response and Prevention of Gender-Based Violence (GBV) in South Sudan, the project works to increase access to safe sanitation and increase knowledge about hygiene, violence prevention, and women's leadership. Implemented by the International Organization of Migration (IOM), this project aims to construct water distribution systems and sanitation infrastructure, provides materials such as tools to dig latrines and dignity kits for menstrual management products. Additionally, in order to address the increased vulnerability of women when collecting water or visiting latrines, it provides clinical management of rape services and raises awareness to eliminate gender-based violence (USAID Water Team, 2019).

The Integrated WASH Response and Prevention of GBV Project not only directly involves local communities at every step of the project but also centers the voices of women to ensure their safety. In particular, women are heavily involved in decision-making as they primarily decide the best locations for water points, and their concerns are taken into consideration by those working to implement the project. To further address the issue of Gender-Based Violence in South Sudan, men are engaged in a series of dialogues that have been hosted in communities, aiming to address gender-related concerns (USAID Water Team, 2019).

SAMPLE & SITE SELECTION

When selecting a sample for gender-responsive projects, it is necessary to take into consideration how well the participating individuals represent the diversity of the community or how well the research or test site reflects the local reality.

Questions to consider while selecting samples and sites:

- What are the drivers/ motivators for participation in your project?
- What are the inhibitors?

GENDER-UNAWARE

Does not consider any types of social differentiation in sample or site selection.

GENDER-CONSCIOUS

Select a representative sample or site and collect information about the experiences of different genders within the context(s) of the study.

GENDER-RESPONSIVE

Analyzes the different needs, constraints, and opportunities based on gender and other identities.

GENDER-TRANSFORMATIVE

Provides practical solutions to address the differential needs, constraints, and opportunities based on gender and other identities with the aim of creating a long term impact.

PROJECT TEAM COMPOSITION

Form teams that reflect local gender diversity and demographics and ensure that these teams also have local and contextual knowledge.

Each team should include at least one member with experience conducting gender-focused projects wherever possible. Although women researchers can often collect different types of data than their male colleagues (see below), the gender of the researcher alone does not equip them to undertake gender analyses.

It is important to note that Gender Studies is a specialized interdisciplinary academic field.

GENDER-UNAWARE
No consideration for inclusion in hiring or appointment of researchers.

GENDER-CONSCIOUS
Aware of imbalances in gender equality within hiring or appointment of the project team.

GENDER-RESPONSIVE
Actively working toward addressing the gender imbalance in project teams.

GENDER-TRANSFORMATIVE
Establishes the expectation that all rproject teams will achieve a gender balance with equal levels of participation and decision-making capabilities.

IMPORTANCE OF THE TEAM'S COMPOSITION

For gender-responsive research, it is important to have a team that includes women researchers. Women researchers often find it easier to engage with participants who are women, as they are more likely to feel comfortable being vulnerable (Elias, 2013). Gender roles and cultural norms might also prevent women from meeting with researchers who are men (Najjingo-Mangheni, 2017). Women researchers can also provide different perspectives on the challenges and experiences of participants (Beintema, 2017). Similar considerations to other factors of diversity should also be considered based on a full understanding of the community.

DESIGNING
PROJECTS

We use the term "design" to refer to the stage of the project where the overall strategy is determined. In this phase, it is important to take into account gender stereotypes and other social and cultural factors that may result in gender biases.

INCLUSIVE DESIGN

Including representatives from the population of interest during the early stages of project development helps to build support from the community. It also helps to design projects that are relevant and responsive to real needs and that are informed by the unique socio-economic and gender dynamics of the community. Strategically including a diverse group of people in the research design will help ensure that your findings are useful to a wider audience.

GENDER-UNAWARE

No inclusion of the population of interest in the research design process.

GENDER-CONSCIOUS

Share research design with representatives from the population of interest (including different genders).

GENDER-RESPONSIVE

Consult with the population of interest to identify research priorities in line with the aims of the research program and gender equity metrics and outcomes.

GENDER-TRANSFORMATIVE

Collaborate with the population of interest that encourages community involvement and action to design and deliver a high-impact project.

CASE STUDY: Community-Based Education in Afghanistan

In 2014, USAID awarded the United Nations Children's Emergency Fund (UNICEF) with funding to deliver Community-Based Education (CBE) to thirteen provinces in Afghanistan, in collaboration with the Afghan Ministry of Education. The grant additionally provided support for Accelerated Learning Centers (ALCs), which were "specifically designed for young women whose educational opportunities earlier in life were interrupted due to conflict, distance to a formal school, lack of female teachers, or lack of learning materials and supplies" (USAID). By directly targeting remote and underserved regions of Afghanistan, this project aimed to provide education to young women and girls, construct facilities and provide educational resources to classrooms, and train educational officers at the provincial and district levels to serve as implementing partners with the Ministry of Education (USAID).

As reported by the Global Partnership for Education, CBE is the only model of education in Afghanistan to reach and provide educational services to more girls than boys while adapting to many security concerns, including conflict, present in the country (Ministry of Education).

QUESTIONS, HYPOTHESES, & VARIABLES

By communicating social, economic, and gender considerations in questions/objectives, hypotheses, and variables (parameters), researchers are better able to assess the possible social impacts of their projects, with particular attention to gender-based differences in consequences. These considerations can also assist in the development of logic models, theories of change, logframes, and MEAL (monitoring, evaluation, accountability, and learning) plans.

GENDER-UNAWARE
No consideration of gender in the objectives or variables.

GENDER-CONSCIOUS
Acknowledgement of gender in questions, hypotheses, and/or variables but without intending to conduct gender analyses.

GENDER-RESPONSIVE
Consideration of gender in questions, hypotheses, and variables; with plans to collect socio-economic parameters needed for gender analyses.

GENDER-TRANSFORMATIVE
Establishes the expectation that the results of the identified questions, hypotheses, and/or variables will contribute to increasing gender equality within the context being studied.

More on the Formulation of Questions, Hypotheses, & Variables

Considering gender-responsiveness when establishing the project's question, hypotheses, and variables ensures the team is well- prepared to collect data that recognizes the importance of gender.

At this stage, consideration should be given to crafting questions, hypotheses, and variables with the goal of analyzing, identifying, and transforming inequitable gender-based social, economic, and power relations within the specific context(s) of interest (e.g. historical; institutional; and policy contexts).

A gender-transformative approach to the formulation of questions, hypotheses, and variables **engages participants** in activities to shape and inform research questions, hypotheses, variables, indicators, and outcome measures. It is more likely to result in changed behaviors or the design of innovations in order to address inequalities.

Sample Monitoring, Evaluation, Accountability, & Learning Activities

POPULATION OF INTEREST

Collect data on gender-based needs, constraints, and opportunities within the project context(s).

EXAMPLE: Collect data separately on different genders using individual and household-level interviews, surveys, focus groups, and/or key informant interviews with local leaders.

RESEARCH TEAM COMPOSITION

Collect and monitor data on gender in team composition. Use data to establish gender balance and diversity in projcet teams.

EXAMPLE: Establish mixed gender field teams.

FORMULATION OF QUESTIONS, HYPOTHESES, & VARIABLES

Measure and monitor alignment of questions, hypotheses, and variables with specific gender-based inequities, needs, constraints, and opportunities within the project context(s).

EXAMPLE: Variables of measure should include how men and women use tools, inputs and technologies; access to and use of information and local knowledge of resources by gender.

IMPLEMENTING
PROJECTS

Project implementation refers to the running of activities proposed in the planning phase or adapting to suit emerging project needs. During project implementation, gender-responsiveness includes conducting gendered aspects of your project, such as collecting disaggregated data.

DATA COLLECTION

When collecting data, it is essential to utilize methods that respect local norms and contexts. It is important to design strategies that overcome barriers to access and participation, while ensuring that all individuals in a particular community will be able to benefit from a specific project.

Projects should additionally work to employ a mixed-gender field team for data collection, hold meetings/events at times and locations that are appropriate and safe for all participants to attend, and use the language that is most appropriate to participants.

GENDER-UNAWARE
Recruit local participants without considering gender or other social identities (such as religious and cultural identities or socioeconomic status).

GENDER-CONSCIOUS
Recruit participants with a consideration of gender and other social identities.

GENDER-RESPONSIVE
Recruit participants with a consideration of gender and implement strategies to address cultural, social, religious, or other constraints faced by different genders in participating in the project.

GENDER-TRANSFORMATIVE
Establish a protocol to recruit participants that considers gender and incorporates strategies to address constraints experienced by different genders. Work with the community to ensure that the protocol is based on local needs.

EXAMPLES OF GENDER CONSIDERATIONS DURING DATA COLLECTION

- Create safe spaces to discuss sensitive topics
- Pair participants with researchers with whom they will feel most comfortable
- Consider gender differences in workload and time demands
- Provide transportation and/or meeting locations convenient for participants (particularly those not traditionally included in such projects).

CASE STUDY: Participatory Gender Data Collection

At the local, national, and international level, gaps in gender data collection make it difficult to not only monitor progress for women and girls but also to accurately represent their lived experiences and various issues they may encounter (Azcona & Valero, 2018). According to Papa Seck, chief statistician at UN Women, participatory gender data collection "which can involve directly engaging women's civil society groups or grassroots networks in developing methodologies and questions" yields more data than is likely to be utilized, however, it is often neglected because of time and monetary constraints (Lieberman, 2020). This method, Seck emphasizes, is useful in bridging gaps between civil society and governments, while also bringing about high-quality data, since the end-users are actively involved in the process of data collection (Lieberman, 2020). Participatory gender data collection has been utilized successfully by GROOTS Kenya, a grassroots organization that has trained over 2,000 women to conduct household surveys on topics from clean cooking technology to climate change. While there has been opposition to this practice, GROOTS is working with the Kenyan National Board of Statistics to expand the government's data collection tools by ensuring consideration of gender, age, sexual orientation, and other identities (Lieberman, 2020).

DATA ANALYSIS

Conducting a gender-aware analysis of the data collected will lead to a clearer understanding of how people of different genders are impacted by the issue or innovation being studied.

Using a gender-responsive approach asks:

- Does the analysis draw out the critical similarities and differences in the experiences between genders of the issue or innovation?;
- Does the analysis consider the gender dimensions of social groups?; and
- Do the case studies highlight the initiative and agency of all genders (rather than portraying some as vulnerable)?.

Using a gender-transformative approach asks:

- Does the analysis consider gendered inequalities of power?; and
- What strategic approaches could be used to address them?.

GENDER-UNAWARE
Analysis is not disaggregated.

GENDER-CONSCIOUS
Conduct gender and sex-disaggregated data analysis in order to identify similar and differential experiences of participants.

GENDER-RESPONSIVE
Use disaggregated analysis to:

- Identify the impact(s) of other identities (i.e. ethnicity, class, age, income).
- Acknowledge diverse perspectives within a social group to avoid generalization.
- Identify examples of agency and resistance.

GENDER-TRANSFORMATIVE
Use disaggregated analysis to:

- Provide findings to participants for input, verification, and implementation (where appropriate).
- Locate analyses in relation to broader gendered power relations and identify strategies to mitigate power inequalities.

Sample Monitoring, Evaluation, Accountability, & Learning Activities

DATA COLLECTION

Collect data on participant samples that can be disaggregated in different ways to improve the quality of your analyses. Use data to monitor diversity of samples and identify barriers to access and participation. Include participants as key informants to identify specific barriers to access and participation.

EXAMPLE: Ensure women feel comfortable expressing their opinions (if possible, carry out separate focus groups or interviews simultaneously). When scheduling time and venues for project activities, be sensitive to women's workloads and restricted mobility.

DATA ANALYSIS

Disaggregate and analyze data to identify inequitable social, economic, and power relations within the project context(s).

EXAMPLE: Ensure analysis is sensitive to the differences between (and within) genders or gender-diverse communities. Data should unpack the category of "women" to look at intersecting identities like age, caste, income, etc.

SHARING
FINDINGS

Sharing research results with diverse audiences is a crucial stage in the project cycle. Gender-responsive outreach efforts aim to maximize the reach of results and recommendations by diversifying communication tools and methods, ensuring that women and other typically under-reached groups have access to valuable innovations and research outputs.

PREPARING REPORTS

When writing reports, use appropriate language that matches the technical understanding of your target audience. Publications, presentations, and reports, should provide gender-disaggregated data to understand the contributions made by different genders. Where possible, consider other categories of social differentiation to disaggregate your data and add depth to your findings. Partner with local organizations and communities to ensure that the findings and information are presented in accessible and inclusive ways.

GENDER-UNAWARE

Communicate findings without consideration of gender or other social identities.

GENDER-CONSCIOUS

Communicate disaggregated findings using gender and context-sensitive language that show diversity, differences, and similarities.

GENDER-RESPONSIVE

Contextualize gender with additional information (e.g.ethnicity, class, caste, income, etc.) and acknowledge inequitable gender-based social, economic, and power relations.

GENDER-TRANSFORMATIVE

Identify recommendations that challenge inequitable gender-based social, economic, and power relations and work to implement these recommendations with the local community.

COMMUNICATING FINDINGS

Identify stakeholders who will be using the project findings and/or recommendations and be aware of the types of information technologies that your stakeholders have access to (i.e. radios, televisions, cell phones, and the internet) .

GENDER-UNAWARE

No consideration given to accessing diverse stakeholders.

GENDER-CONSCIOUS

Understand the demographic diversity of stakeholders but do not develop a strategy to disseminate findings to traditionally under-reached populations.

GENDER-RESPONSIVE

Understand the demographic diversity of stakeholders and identify specific barriers to stakeholder access. Design specific strategies for equitable and accessible communication of findings.

GENDER-TRANSFORMATIVE

Understand the demographic diversity of stakeholders, identify specific barriers to stakeholder access, and actively work to normalize multiple approaches to communicate findings to different stakeholder groups.

Gender-Based Barriers to Implementation

A number of constraints exist that complicate project implementation, including unequal roles in decision-making, unequal access to information or credit, unequal ownership of land, and no direct linkage to markets (see additional resources for more examples). Therefore, it is important to consider gendered differences in access to resources and services. To combat these constraints, researchers and practitioners should:

- Identify barriers to development and uptake of gender-equitable practices (e.g. unequal access to resources; unequal roles or power in decision-making processes; and unequal access to services).
- Identify who controls access to resources, decision-making processes, and services.
- Identify strategies for improving access to resources, decision-making processes, and services within the specific context(s) of interest (e.g. historical; institutional; and policy contexts).

IMPLEMENTATION IN CURRENT PROGRAMS

The team should monitor the implementation of programs and identify the best practices, unintended consequences, and opportunities for further improvement.

When considering these things, it may be helpful to ask questions such as who, where, when, how, and to what extent are people experiencing inclusion/exclusion or benefiting/being harmed.

GENDER-UNAWARE
Implementation of current programs without consideration for gender implementation.

GENDER-CONSCIOUS
Identify the who; where; when; how; to what extent in relation to gender in current programs.

GENDER-RESPONSIVE
Identify and monitor the adoption of gender-responsive practices. Identify unintended consequences and/or benefits of innovations. Identify unique adoptions and adaptations of innovations by users, organizations, and/or programs.

GENDER-TRANSFORMATIVE
Identify and monitor changes in societal norms or policies that impact gender equality, assessing how innovations and information systems can reduce inequality.

Sample Monitoring, Evaluation, Accountability, & Learning Activities

WRITING AND COMMUNICATING FINDINGS

Monitor and evaluate efforts to identify and engage with target audiences. Identify new and relevant audiences with whom to share research and findings.

EXAMPLE: Adopt diverse and mixed methods of communication to reach women and men, including visual materials, verbal methods, digital materials, and traditional media.

GENDER-BASED BARRIERS TO ADOPTION

Monitor the extent to which those who have previously been denied access to resources, decision-making processes, and services are gaining access.

EXAMPLE: Consider gender norms related to access to and control of productive resources and services, women's access to land, credit, technology and other inputs, or extension services.

IMPLEMENTATION IN CURRENT PROGRAMS

Monitor uptake and attrition of gender-responsive innovations, and respond to barriers to uptake.

EXAMPLE: Understand, address, and combat constraints including gender norms and relations, women's lack of access to financial capital, gendered divisions of labor, and inequitable access to information.

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The following pages provides a list of works cited as well as some additional resources that researchers and practitioners may find useful.

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Gender Inclusion

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