

Gender integration guide

How to design gender transformative investments - A BMGF Tool

This gender integration guide was originally created by the Bill and Melinda Gates Foundation as a part of their Gender Equality Toolbox. We have recreated the tool in this toolkit for ease of use, users are advised to refer to the original tool linked at the bottom of this page.

This guide focuses on the investment design phase, where the investment makers are encouraged to incorporate a gender lens to contribute to the success and impact of a project.

This tool is primarily meant for funders (grantmakers, investors) as they strive to design gender inclusive investments.

Directions to use the integration guide:

1. This tool should be completed by members of an investment committee and members who have a deep understanding of the prospective partner's business activities. We recommend you use this guide with your partners ideally in the concept development phase before a full proposal is developed.
2. It is recommended that this is used in conjunction with the Gender Integration Marker to guide the assignment of a category for each investment. Access the Gender Integration Marker guide [here](#).
3. Use the key questions in the tool to understand how gender impacts a given investment and guide discussions with partners to shape the investment.
4. Using the prompts and questions, uncover areas of opportunity where a gender lens can be incorporated into the investment design.
5. This tool can also support the Gender Impact Assessment guide [here](#).
6. At the end of the tool we have provided a glossary of some commonly used terms in the tool which will aid in better understanding of some of the questions.

For more information, click [HERE](#) to access the Gender Integration Guide by the Gates Gender Equality Toolbox.



Primary audience
Funders



Tool type
Guide



Personnel
Investment analysts



Duration
2-4 hours

GOALS

(1) Design gender transformative investments and understand your prospective grantee/investee's current standing towards gender transformation.

(2) Guide discussions with partners before concept development.

REQUIREMENTS

(1) No additional investment in terms of financial, human or technical resources.

(2) We recommend you finish the questionnaire in one sitting and answer as accurately as possible.

(3) If there are terms which are unclear refer to the [Gender concepts glossary](#) or consult your Gender Advisor

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GUIDING QUESTIONS TO DESIGN GENDER TRANSFORMATIVE INVESTMENTS

To understand how gender affects a certain investment and to design gender integrated solutions, funders can use the below questions and prompts to incorporate a gender lens in the investment design. We recommend users to read through the [BMGF gender integration guide](#) for the original tool and also for other related reading material.

(A) PROBLEM: *What problem does this investment target?*

To integrate a gender lens, look for:

- Is there a clear articulation of the problem that the intervention, technology or product is trying to solve?
- Is there an analysis of the social context of the problem?

(B) POPULATION: *Who is affected by this problem?*

To integrate a gender lens, look for:

- Is there an analysis of who is most affected by this problem and/or will most benefit most from the proposed solution?
- How does the problem differentially affect people based on their social and demographic characteristics— e.g. age, sex, gender identity, ability, status, race, class, ethnicity, sexual orientation, migratory status, etc.?

(C) CONTEXT: *What is the gendered context in which the problem exists?*

To integrate a gender lens, look for:

- Is there a gender analysis that was conducted? This would be demonstrated by a context analysis that identifies the different barriers, challenges and opportunities that people face with regard to the problem because of their gender. If no formal gender analysis was conducted, you can request one be included in the start up phase of the investment in order to establish and update design as needed to address:
 - differences in how people experience the problem because of their gender.
 - additional challenges that result from the intersection of gender barriers with other forms of discrimination that further determine how people experience the problem (intersectionality).
 - references to primary and secondary data on gender differences in access to (the opportunity to use a resource), use of, control over (the capacity to make decisions about who uses resources, how they are used and how to dispose of it) and agency over (the capacity to control resources, free from threats, violence or retribution) relevant resources in the specific context.

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(C) CONTEXT: *What is the gendered context in which the problem exists?*

- Is there a gender analysis that was conducted? This would be demonstrated by a context analysis that identifies the different barriers, challenges and opportunities that people face with regard to the problem because of their gender. If no formal gender analysis was conducted, you can request one be included in the start up phase of the investment in order to establish and update design as needed to address:
 - descriptions of the gender differences related to who makes decisions relevant to the problem and also to the intervention, technology or product, e.g., design of services or products, access to transportation, household activities, spending on services or products, service utilization, design of policy, design of market strategies, design and implementation of research activities, gender dynamics in the implementing team, etc.
 - descriptions of relevant gender differences in time use that relate to the problem.
 - an analysis of how institutional policies and practices (public or private) reinforce or challenge gender inequalities.

(D) GENDER GAPS AND BARRIERS: *What are the relevant gender gaps and barriers affecting this problem?*

To integrate a gender lens, look for:

- Is there a clear articulation of gender gaps/barriers in access to and/or in control/agency over resources?
- Is there a clear articulation of how people may benefit differently from an intervention, technology or product because of their gender?.
- Is there data supporting the identification of gender gaps and barriers?.
- Is there a clear articulation of how these gender gaps and barriers relate to the desired sectoral outcomes?
- Is there an explanation of how these gaps were prioritized in determining the proposed solution(s)?

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(E) SOLUTION: *How does the proposed solution integrate a gender lens?*

To integrate a gender lens, look for:

- Does the proposed solution address the prioritized gender gaps and barriers in access to resources or increases the evidence base around these.
 - a clear plan of how the approach will address the prioritized gender gaps and barriers in access to resources, or increase the evidence base around these.
 - an articulation of how the proposed scope, approach and planned activities or research will account for gender gaps and barriers in access to resources. For example by suggesting different gender specific approaches to reaching investment participants without exacerbating gender inequalities.
- Does it provide a description and analysis of the potential risks (unintended consequences) that may arise from targeting gender gaps or gender inequality.
 - a strategy for mitigating or avoiding these potential risks, including indicators to monitor whether the identified risks happen.
- Does it include activities and outputs that engage men, or research their potential role, in the achievement of gender equality outcomes and that result in benefits for all.
- Does it include activities and outputs that address how the problem affects people of different ages, e.g. engaging and/ or benefitting children will require different activities than those involving adults.
- Does it address specific outcomes and outputs in the results framework that set clear targets for the reduction of gender gaps in access to resources or for the increase of the evidence base around gender gaps/ barriers.
- Does it include a plan to measure changes in the identified gender gaps and barriers and how these changes affect progress towards sectoral outcomes. Specifically:
 - a plan to collect and report sex disaggregated data.
 - a plan to collect relevant data on gender gaps and barriers and their links to sectoral outcomes to assess progress, inform midcourse corrections (as needed) and ultimately show who has been effectively reached with which services/products.
 - a plan for how the analysis of the data on gender gaps will inform the project progress and outcomes.

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(E) SOLUTION: *How does the proposed solution integrate a gender lens?*

To integrate a gender lens, look for:

- Does the solution include a gender expertise in the implementation/partner team. Specifically:
 - the staff identified have the appropriate skill set and position, i.e., that they have experience conducting gender analysis and integrating gender in program design and have technical knowledge of the sector of this investment.
 - staff with gender expertise have dedicated time to support the investment.
 - if there is no gender expertise on staff or it is not sufficient, look for a plan to obtain expertise on staff or through partnering with other organizations or persons with proven expertise in gender analysis and/or integration

If aiming to push gender integration further to design a gender transformative investment, look for all items described above AND also:

- a clear articulation of how underlying gender power relations and gender gaps in control or agency over resources affect how people experience the problem and also how addressing them may strengthen the investment.
- an explicit intention to address underlying gender power relations and gender gaps in agency over resources, for example,
 - setting outcomes and outputs that aim to increase women and girls' empowerment. – engaging local partners that have experience working to transform unequal gender power relations.
 - engaging decision-makers and stakeholders at all levels to support the investment's focus on transforming gender power relations.

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RELEVANT GLOSSARY

As you work through this tool, you may have come across terms that are unfamiliar or confusing. Below is a list of some terms, knowing which would aid in better understanding of the tool. If there still are terms that you do not understand, it is recommended to refer to the [Gender Glossary](#) and other linked sources or consult with your Gender Advisor (if your organization has one).

Gender mainstreaming / integration is a process that involves embedding of a gender perspective into the entire spectrum of an organization's activities including its strategies, structures, policies, culture, systems and operations. It ensures that the needs and interests of all genders are included in the design, implementation, and M&E of any planned activity

Gender lens refers to a perspective that aims to identify and understand gendered power differences and biases among different groups in economic, social and legal contexts by analysing the relationship between different gendered groups, their access to resources and opportunities, and the constraints they face relative to each other.

Gender/ social norms are collectively held standards to which people are expected to conform at different stages of their lives based on their sex or gender identity. These are norms that seek to represent beliefs and values of what it means to male or female in different societal contexts. *E.g., gendered expectations for women to engage in unpaid caregiving work limits their time to engage in productive agricultural activities.*

Gender gap refers to the disparity in men and women's social, political, intellectual cultural and/or economic condition or position in society, often based on underlying socio-cultural norms. It reflects the unequal distribution of resources, opportunities and outcomes across genders. *E.g., women smallholder farmers have less access to digital financial services indicating a gender gap in access to resources.*

Gender bias refers to the conscious or unconscious, explicit or implicit prejudiced actions or thoughts that could lead to unfair treatment of people based on their perceived gender. *E.g., male farm laborers hired by women farm owners are likely to be less hardworking and reliable due to the lower perceived strictness of women.*

Sex disaggregated data refers to quantitative and qualitative data collected and presented by sex that allows for measurement of socio-economic and socio-cultural differences between men and women. *E.g., collection of data on the number of women and men smallholder farmers that use digital tools for agriculture separately in order to measure the gendered differences in uptake of digital services.*