

Gender integration marker

How to assess gender intentionality in investments – A BMFG tool

This gender integration marker 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 gender integration marker is aimed to help assess the level of gender integration within the design of an investment. This tool is primarily meant for funders (grantmakers, investors) as they strive to design gender inclusive investments.

Directions to use the integration marker:

1. This tool should be completed by members of an investment committee.
2. There are 7 questions to assess various levels of gender integration. For questions 1- 6 answer “YES” or “NO” based on your understanding and explain your answers.
3. Count the number of “YES” answers. If the count is 3 or more, the investment is likely gender intentional or transformative. Continue to step 3. If the count is fewer than 3 the investment is gender unintentional. Skip to step 5.
4. Answer question 7 and explain your response.
5. If you answered “YES” to question 7, the investment is gender transformative. If you answered “NO” to question 7, the investment is gender intentional.
6. Mark correct final category of investment based on this assessment.
7. 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 Marker by Gates Gender Equality Toolbox.



Primary audience
Funders



Tool type
Worksheet



Personnel
Investment analysts,
Investment committee



Duration
1-2 hours

GOALS

(1) Assess the your level of gender integration within the design of an investment.

(2) Realize your vision of becoming gender intentional by strategically applying a gender lens in your investments, strategies and operational functions.

REQUIREMENTS

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

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

(3) If there are terms which are unclear we suggest referring to [Gender concepts glossary](#) tool or consult your Gender Advisor if you have one.

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GUIDING QUESTIONS TO ASSESS THE LEVEL OF GENDER INTENTIONALITY IN INVESTMENT DESIGN

To understand if your investment is gender intentional or transformative, funder can use the below questions and prompts to assess their level of gender intentionality:

GENDER INTEGRATION ASSESSMENT

Step 1: Answer questions 1-6 and explain your responses

1. Is advancing gender equality and/or women and girls' empowerment the main objective of this investment?

YES NO

Explain:

2. Is there a primary outcome that intends to contribute to the reduction of gender barriers and/or gender gaps in access to resources?

YES NO

If yes, which gender gap or barrier? Explain:

3. Will the investment measure its contribution to a reduction in gender barriers and/or gender gaps? (e.g., through the collection and monitoring of sex-disaggregated data, etc.)

YES NO

Explain:

4. Has the design of the investment, or will the implementation of the investment, be informed by a gender analysis? (A critical and systematic examination of differences in the constraints and opportunities available to an individual or group of individuals based on their sex, gender, and/or other markers of identity)

YES NO

Explain:

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GENDER INTEGRATION ASSESSMENT

Step 1: Answer questions 1-6 and explain your responses

5. Will the implementation team include someone with significant expertise in gender equality programming who is dedicated to ensuring effective gender integration? YES NO

Explain:

6. Have potential gender-related negative consequences that may arise from this investment been identified and have appropriate mitigation strategies been developed? (e.g., increasing labor without increasing returns, loss of control of an asset as it becomes more valuable, gender-related backlash or violence, etc.) YES NO

Explain:

Step 2: Count the number of “YES” answers. If the count is 3 or more, the investment is likely gender intentional or transformative. Continue to step 3. If it is fewer than 3, the investment is gender unintentional. Skip to step 5.

Step 3: Answer question 7 and explain your response.

7. Is there a primary outcome that contributes to the reduction of gender barriers and/or gender gaps in agency over resources and is there at least one indicator to measure this? (e.g., control over the use of resources) YES NO

Explain:

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GUIDING QUESTIONS TO ASSESS THE LEVEL OF GENDER INTENTIONALITY IN INVESTMENT DESIGN

To understand if your investment is gender intentional or transformative, funder can use the below questions and prompts to assess their level of gender intentionality:

Step 4: If you answered “YES” to question 7, the investment is gender transformative. If you answered “NO” to question 7, the investment is gender intentional.

FINAL ASSESSMENT

Step 5: Mark the correct category based on this assessment

Gender Unintentional

Gender Intentional

Gender Transformative

Explain (optional):

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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 be 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.*