



A Toolkit for Integrating GENDER EQUALITY AND SOCIAL INCLUSION

in Design, Monitoring and Evaluation



April 2020

ACKNOWLEDGEMENTS

The development of this toolkit would not have been possible without the contributions and hard work of several individuals and teams:

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Financial Contribution

Financial assistance for the development of this toolkit was provided by Imago Dei Fund (IDF) and World Vision's Evidence and Learning Reserve Funds.

World Vision is a Christian humanitarian organization dedicated to working with children, families, and their communities worldwide to reach their full potential by tackling the causes of poverty and injustice.

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ABOUT THE TOOLKIT

Gender Equality and Social Inclusion (GESI) is integral to achieving global sustainable development goals, and World Vision's "Our Promise" strategy and child well-being objectives¹. GESI advances World Vision's core values to promote human transformation by reaching the most vulnerable children and adults and challenging the root causes of vulnerability that sustain gender inequality and social exclusion, such as restrictive socio-cultural norms, unequal power relations and disempowering systems. Promoting GESI is vital to meeting donor mandates to address the needs of the most vulnerable and to and achieve global commitments to create sustainable change.

World Vision has a duty to capture and communicate the impact of our work to advance the well-being of the most vulnerable children, their families and communities as mandated by institutional priorities. The process of capturing GESI-related impact is challenging, requiring specific tools and skills to understand complex long-term processes of transformational development.

THE PURPOSE OF THE TOOLKIT

This toolkit is designed to provide guidance and tools to support staff in integrating GESI perspectives in all stages of project Design, Monitoring and Evaluation (DME). The goal is to enhance the effectiveness, impact and sustainability of World Vision's work from a GESI perspective. The toolkit includes practical guidance to help staff align relief and development programming with international GESI integration standards and best practices. The toolkit is based on a review of existing DME tools and approaches. The tools presented are not exhaustive, and users are encouraged to explore other resources, some of which can complement the use of the tools presented in this toolkit.

WHO CAN USE THE TOOLKIT

This toolkit is relevant to a variety of users in the field of international development. More specifically, the tools are designed for a variety of program teams across different sectors including proposal/business development; monitoring, evaluation and research; program management and GESI. The toolkit may be a useful resource for implementing partners and government stakeholders, as they collaborate on gender equality and social inclusion goals. Both individuals and organizations can use this toolkit to apply a GESI lens in all stages of project Design, Monitoring and Evaluation (DME).

THE STRUCTURE OF THE TOOLKIT

The toolkit is divided into four sections and includes an annex with a GESI glossary of terms, and illustrative indicators for different sectors. It also includes references. The four sections include the tools outlined in Figure 1.

¹ World Vision's global child wellbeing framework and strategic initiatives on utilizing evidence of impact.

Figure 1 | Structure of the GESI DME Toolkit

GESI DME Toolkit Structure

Section 1 INTRODUCING A GESI LENS

TOOL 1.1 How to Apply a GESI Lens

TOOL 1.2 GESI Minimum Standards

TOOL 1.3 Reflection Checklist

Section 2 CONDUCTING A GESI ANALYSIS

TOOL 2.1 Conducting a GESI Analysis

- Step 1 Collective Brainstorming
- Step 2 GESI-Responsive Desk Review
- Step 3 GESI-Responsive Primary Data Collection
- Step 4 Analyzing and Reporting GESI-Responsive Data

Section 3 GESI INTEGRATION IN PROGRAM DESIGN

TOOL 3.1 GESI Integration in Proposal Development

TOOL 3.2 GESI Integration in Program Design

TOOL 3.3 GESI Indicators

TOOL 3.4 GESI Integration Action Plan

TOOL 3.5 GESI-Responsive Budgeting

Section 4 GESI INTEGRATION IN PROGRAM IMPLEMENTATION, MONITORING & EVALUATION

TOOL 4.1 GESI Integration in Program Monitoring

TOOL 4.2 GESI Responsive Program Evaluation

TOOL 4.3 Analyzing and Reporting GESI-Responsive Data

Section I

Introducing a GESI Lens

This section explains the concept of Gender Equality and Social Inclusion (GESI) and introduces a lens that you can use to apply throughout the project cycle. The section includes three tools:

TOOL 1.1 How to Apply a GESI Lens

TOOL 1.2 GESI Minimum Standard

TOOL 1.3 Reflection Checklist

TOOL 1.1 HOW TO APPLY A GESI LENS

This tool defines GESI and outlines four critical steps in applying a GESI lens in project design, monitoring and evaluation processes.

DEFINING GESI

Gender equality is the state or condition that affords women and girls, men and boys, equal enjoyment of human rights, socially valued goods, opportunities, and resources. It includes expanding freedoms and voice, improving power dynamics and relations, transforming gender roles and enhancing overall quality of life so that males and females achieve their full potential².

Social inclusion seeks to address inequality and/or exclusion of vulnerable populations by improving terms of participation in society and enhancing opportunities, access to resources, voice and respect for human rights. It seeks to promote empowerment and advance peaceful and inclusive societies and institutions.³

World Vision defines GESI as a multi-faceted process of transformation⁴ that:

Promotes equal and inclusive access, decision-making, participation, and well-being of the most vulnerable;

Transforms systems, social norms, and relations to enable the most vulnerable to participate in and benefit equally from development interventions;

Builds individual and collective agency (or empowerment), resilience, and action; and

Promotes the empowerment and well-being of vulnerable children, their families and communities.

Our goal is to achieve sustained, transformational change at individual, household, community and societal levels so that all persons can enjoy fullness of life.

GESI advances World Vision's core values to promote human transformation by reaching the most vulnerable people and challenging the root causes of vulnerability that sustain gender inequality and social exclusion.

² See UN Women; USAID Gender Equality and Female Empowerment Policy; and Kabeer (2005) on empowerment.

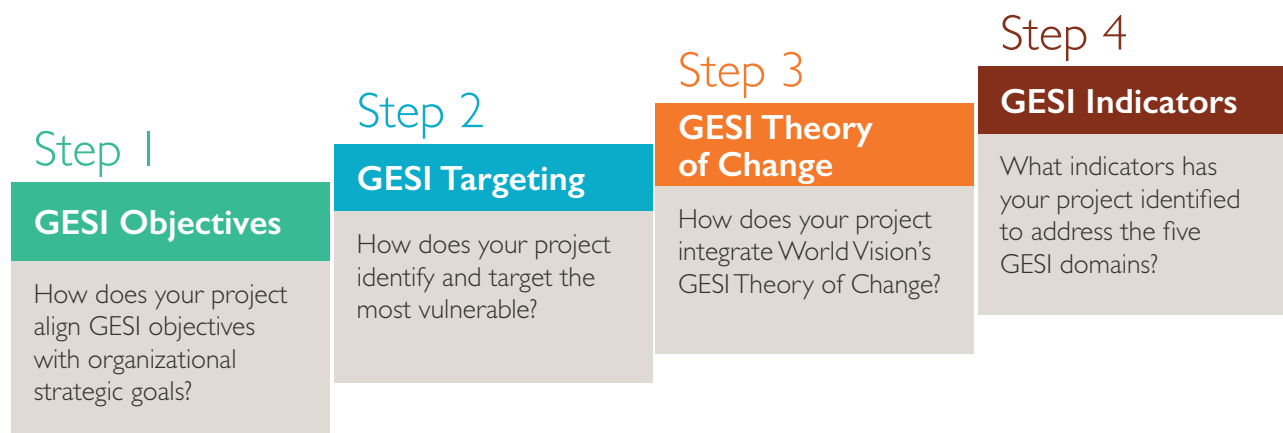
³ Adapted from United Nations Sustainable Development Goals (SDGs), particularly SDG# 5, 8, 10, 11 and 16 which emphasize equality and inclusion.

⁴ See World Vision GESI approach and TOC; adapted from United Nations Sustainable Development Goals (SDGs).

FOUR STEPS TO APPLYING A GESI LENS

There are four steps to applying a GESI lens as outlined in Figure 2 below, each with a key question for you to answer:

FIGURE 2 | Steps for Applying a GESI Lens



Step 1 | Incorporate GESI-related objectives in the project

As outlined above in TOOL 1.1, Gender Equality and Social Inclusion (GESI) is integral to achieving sustained transformational development as an organization. WV staff need to identify how each project can support GESI-related organizational objectives laid out within “Our Promise” global strategy and child well-being objectives⁵.

How does your project integrate GESI-related objectives?

Step 2 | Target the most vulnerable

It is important to use a GESI lens to define the most vulnerable in the project context and identify institutions or processes that cause and support inequality and exclusion. Evidence suggests that gender inequality and social exclusion disproportionately affects children—girls and boys, women, persons with disabilities (PWDs), youth, and people living in poverty (PLP). Other factors of vulnerability or exclusion include refugee or migrant status, ethnicity, religion, age, language and health status. Individuals have overlapping and inter-related vulnerabilities (known as intersectionality). For example, women with disabilities may face double marginalization because of gender norms, stereotypes and stigma towards persons with disabilities; Adolescent boys living in extreme poverty may be exposed to higher risks of community violence (due to age and socio-economic status).

5 Refer to World Vision's global impact framework and strategic initiative 2.2 on utilizing evidence of impact.

To reflect this intersectionality, World Vision identifies vulnerable children⁶ as those under the age of 18 years and are living with two or more factors:

In abusive, violent or exploitative relationships;

In extreme poverty and deprivation;

With serious discrimination that prevents them from accessing services/opportunities;

With the most vulnerability to negative impacts of catastrophes or disasters;

With disabilities or life-threatening illness/condition (e.g. HIV/AIDS); and

Lack adequate care and protection.



How does your project identify and target the most vulnerable and address overlapping vulnerabilities?

Step 3 | Integrate World Vision's GESI Theory of Change

The purpose of the World Vision GESI Theory of Change is to build a common understanding of the pathways of change required to achieve gender equality and social inclusion and to promote and guide the systematic integration of gender equality and social inclusion within and across programming sectors. It is therefore vital that the Theory of Change as outlined in Figure 3 is incorporated into project interventions and theories of change.

FIGURE 3 | World Vision's GESI Theory of Change



Our GESI approach and Theory of Change features five GESI domains of change that need to have impact across all levels from individual to societal level. The domains are defined in more detail in Figure 4.

To integrate the theory of change into your program you need to use the five domains to ask:

1. Have you understood barriers faced by vulnerable groups related to each of the domains and the level at which they face the barriers? Barriers may vary across different sectors (health, education, child protection, WASH, food security and livelihoods and emergency response).
2. Have you identified key actions relating to GESI domains in order to transform the current situation and at what level those actions need to be taken?

FIGURE 4 | World Vision's five GESI domains

ACCESS

The ability to access, use, control, and/or own assets, resources, opportunities, services, benefits and infrastructures.

PARTICIPATION

The ability to participate in or engage in societal affairs and systems of power that influence and determine development, life activities and outcomes.

DECISION-MAKING

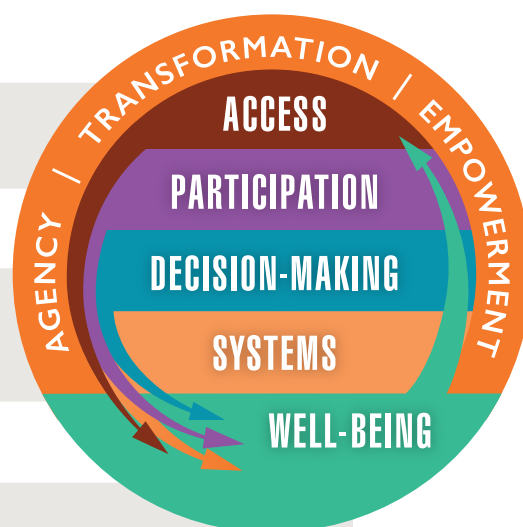
The ability to make decisions free of coercion at individual, family, community, and societal levels.

SYSTEMS

The availability of equal and inclusive systems that promote equity, account for the different needs of vulnerable populations and create enabling environments for their engagement.

WELL-BEING

The sense of agency, worth, capability status, confidence, dignity, safety, health and overall physical, emotional psychological and spiritual well-being.



**How does your project integrate
World Vision's GESI Theory of Change?**

Step 4 | Identify indicators along the five GESI domains

The five GESI domains of change are necessary to achieving greater gender equality and social inclusion in all our work. The following questions can help you determine GESI-responsive indicators connected to World Vision's GESI theory of change and its five domains.

- Are your indicators SMART?—Simple, Measurable, Achievable, Realistic, and Time-bound?
- How do your interventions, activities and milestones address any of the issues outlined in the five GESI domains?
- How are you going to evaluate whether your project accomplished what it said it would do?

It is important to reflect on how your project addresses all the five GESI domains to ensure our programs are GESI-responsive. GESI-responsiveness means understanding and taking into account of the differences in needs, opportunities and experiences of women, men, girls, boys, persons with disabilities, IDPs, and other vulnerable groups, and adjusting our goals, activities, strategies and practices in ways that appropriately integrate those needs, opportunities and experiences in our programming. The goal is to achieve a transformative and sustainable change within an ecosystem, considering gender and social inclusion barriers and/or opportunities at the ecosystem's individual, household, community and societal levels. Further guidance on GESI indicators can be found in TOOL 3.3 and illustrative GESI-specific indicators are listed in Annex 2.

What indicators has your project identified to assess progress against the 5 GESI domains?

TOOL 1.2 GESI MINIMUM STANDARDS

This tool provides a checklist for organizations to assess how well they are doing in addressing GESI issues within their programming and their organization as a whole. It is not enough to address GESI issues solely through programming. This tool is designed to help organizations assess nine areas where they should be meeting minimum standards necessary to advance equitable and inclusive development and emergency relief. The checklist covers issues of policy, capacity and culture, participation and partnership, budget, analysis, data collection, indicators, 'do no harm,' and accountability. Each issue has corresponding statements which serve as minimum standards.⁷ The checklist presented in Table 1 can serve as a baseline and monitoring tool to assess organizational progress. WV staff members can use this checklist to determine whether the standard has been fully met, partially met, or not met at all, as indicated by the columns for noting level of achievement and recommendations.

⁷ The nine categories of minimum standards have been adapted from a document created by the Gender Practitioners' Collaborative (2017), to include broader social inclusion standards

Table I | GESI Integration Checklist

STANDARDS AND ATTRIBUTES	1=Yes 2=Partially 3=No	Recommendations
Standard 1 Adopt GESI policies in the workplace in an inclusive manner		
1.1 A global GESI Policy (both in writing and accessible formats) is developed, disseminated, and used in all HQ, country, and regional offices.		
1.2 Policies and procedures ensure a gender equitable and socially inclusive working environment, including anti-harassment and nondiscrimination policies and consequences, maternity and paternity leave, flexible working conditions, provision of reasonable accommodations and lactation spaces.		
1.3 Human Resource policies for hiring practices include non-discrimination and diversity considerations.		
1.4 A policy is in place to protect program beneficiaries from sexual exploitation and abuse (SEA) by staff and partners.		
1.5 WV staff are introduced to WV's GESI policy and related HR policies during staff onboarding.		
Standard 2 Develop organizational culture and capacity building for GESI		
2.1 Senior management undertakes responsibility for leading and implementing GESI policies and programming, evident in staff meetings, staff onboarding and training, adherence to HR policies, and support for GESI DME practices in program cycle.		
2.2 WV staff members have participated in at least one GESI training organized or led by WV Gender Advisors and/or Social Inclusion Advisors every 2 years.		
2.3 GESI-related roles and responsibilities are articulated in job descriptions, professional development plans, and performance evaluations.		
2.4 WV staff members are aware of a gender and/or social inclusion focal point, expert, or advisor whom they can call upon for assistance and expertise.		
2.5 Project staff have the necessary experience and competencies for gender and inclusion-responsive programming.		
2.6 There is an appropriate balance among project staff in term of gender at all levels, especially for field-based WV or partner staff.		
2.7 Persons with disabilities, and those from other marginalized groups work for WV and partners.		
Standard 3 Ensure GESI-sensitive participation and partnership		
3.1 Program partners and relevant stakeholders are aware of and familiar with WV's GESI policies.		
3.2 Program partners are selected and vetted with consideration of their GESI policies and the diversity of their workforce and their ability to program with all groups.		

STANDARDS AND ATTRIBUTES	1=Yes 2=Partially 3=No	Recommendations
3.3 Program participants are engaged in the program design and activities according to their specific needs, safety requirements, and cultural sensitivities.		
3.4 Program participants have equitable access to trainings, activities, and other opportunities that WV provides, irrespective of their sex, disability status, age or other social characteristics.		
Standard 4 Allocate resources for GESI		
4.1 Annual strategic planning and budgeting processes account for GESI-related costs in each fiscal year and program cycle.		
4.2 Proposal budgets include budget lines for meeting GESI-related program outcomes and an inclusion fund to cover inclusion costs including sign language, accessible communication, adapted transport, provision of adapted devices etc.		
4.3 GESI-related budget line items include designated GESI personnel, capacity-building/training, GESI assessments, and additional costs to ensure safety and cultural sensitivity of diverse individuals and groups.		
Standard 5 Conduct and utilize GESI assessments		
5.1 GESI assessment is conducted during the design stage and included in the program proposal.		
5.2 The GESI assessment allows for hearing the voices of diverse stakeholders, including potential program participants (all gender and social groups are represented), community leaders, and local government representatives (e.g. time and location of interviews/ focus group discussions are convenient and safe for all, especially if sensitive topics are addressed).		
5.3 The GESI assessment employs participatory methods, allowing individuals and groups to meaningfully contribute.		
5.4 The findings from the GESI assessments are used to inform program work plans, activities, budgets, and monitoring and evaluation (M&E) processes.		
5.5 The assessment evaluates the following:		
a Roles and responsibilities within households and communities, including productive and reproductive workloads and mobility.		
b Access to and control of assets, resources and opportunities, and obstacles in seeking services.		
c Decision-making and power relations at household, community, regional and/or national levels.		
d Needs, priorities and perspectives, including practical needs and strategic interests of different groups and their ideas on appropriate and sustainable ways of addressing needs.		
e Participation and leadership in community activities and associations, leadership views on gender equality and social inclusion, preferred communication channels and barriers to women's leadership.		

STANDARDS AND ATTRIBUTES	1=Yes 2=Partially 3=No	Recommendations
f Knowledge, cultural beliefs and perceptions including access to knowledge and social, religious and cultural attitudes and norms which affect women, men, boys and girls, persons with disabilities and other excluded groups differently.		
g Legal frameworks, laws or other barriers that prevent women and men, boys and girls, persons with disabilities and other excluded groups from having equal opportunities.		
Standard 6 Collect and analyze data disaggregated by gender, disability and other social characteristics		
6.1 The GESI assessment collects disaggregated data by sex, age, and other relevant and important social characteristics (disability status, economic status, religious affiliation, ethnicity, race, etc.) to assess differences and constraints of various groups.		
6.2 Baseline, midline, and end-line studies or evaluations of programs collect data disaggregated by gender, age, and other relevant and important social characteristics (age, disability, economic status, religious affiliation, ethnicity, race, etc.).		
6.3 Data collection methods and processes take measures to ensure safety, security, accessibility and cultural sensitivity of different social groups.		
6.4 Evaluations and program reports highlight the benefits or impacts of programming on different social groups.		
Standard 7 Use GESI indicators		
7.1 Findings from the GESI assessment inform the selection of cross-cutting and sector-specific GESI indicators.		
7.2 GESI indicators selected for program monitoring and evaluation processes are disaggregated in accordance with WV's five GESI domains: access, decision-making, participation, equal systems, and well-being (i.e. there is at least one core indicator for each domain, where possible).		
7.3 GESI sector-specific indicators are measured in all programs.		
7.4 Both quantitative and qualitative GESI indicators are utilized to capture diverse experiences, beliefs, perceptions, and realities.		
Standard 8 Do No Harm		
8.1 A risk assessment is conducted before and during the program to understand and address any potential risks that the program may pose to certain social groups.		
8.2 A plan or strategy for mitigating, monitoring and responding to the identified potential risks and other unintended consequences (such as backlash towards program staff or economic exclusion) is identified and regularly consulted throughout the program cycle.		
8.3 Established mechanisms are in place for both staff and community members to safely report risky or harmful situations, including GBV and disability-related challenges.		

STANDARDS AND ATTRIBUTES	1=Yes 2=Partially 3=No	Recommendations
Standard 9 Accountability		
9.1 Headquarter offices and country offices have completed a GESI audit or organizational assessment to measure internal capacity and progress towards GESI outcomes.		
9.2 Findings from GESI assessments are shared with program staff, partners, and community stakeholders.		
9.3 World Vision established accountability mechanism to monitor the status of gender equality and social inclusion within organizational practices and programming.		

TOOL 1.3 REFLECTION CHECKLIST

Effectively tackling gender inequality and social exclusion in programs requires that staff's personal beliefs and World Vision's organizational culture challenges and discrimination. Increasing personal and institutional awareness and sensitivity is a key step in addressing GESI in DME.

The following tool can help World Vision staff consider their own biases, sources of power and barriers to GESI. It is designed for individuals to self-assess their ability to address gender inequalities and social exclusion.⁸

PURPOSE

This tool is designed to stimulate discussion in work teams and offices when embarking on GESI related work in DME, to raise awareness and understanding of World Vision's GESI goals, and to help identify what might be needed to progress with GESI related actions covered in the rest of this toolkit. The Individual Reflection tool can be used along with TOOL 1.2 GESI Minimum Standards.

The latter can be used as an organizational self reflection tool. The Reflection (individual and organization) assessments are designed to:

- Enable World Vision staff to engage in self-reflection on their own individual ability and institutional capacity to address GESI.
- Assess the organizational capacity and performances of World Vision on promoting GESI.
- Review World Vision's internal systems to address GESI.
- Develop a GESI learning and development plan for the project.

These assessments can be done in paper or electronically (either offline or online).

Who uses these guiding questions? Staff, teams and individuals at all levels.

When to conduct a reflection assessment? Any time during the life of a project, but ideally before using any of the other tools contained in this toolkit.

INSTRUCTIONS

This tool is designed for individuals to self-assess their ability to address gender inequalities and social exclusion. The guiding questions are designed to help World Vision identify staff members' knowledge gaps in addressing GESI issues. The example Excel analysis tool presented below could compute the responses of the individuals and present the results as a traffic light indicator:

- Green = Most of the individuals have positive attitudes, perceptions and beliefs in redressing the gender inequalities and social exclusion.
- Yellow = Only half of the staff members have positive attitudes, perceptions and beliefs in redressing the gender inequalities and social exclusion.
- Red = Most of the individuals have negative attitudes, perceptions and beliefs towards gender equality and social inclusion.

Each team member should complete the reflection to help identify strengths and weaknesses. The results should form a part of your project/teams learning and development strategy.

Table 2 | GESI-Responsive Individual Assessment Checklist

Indicators	Questions	Tick		Recommendations
		Yes	No	
Individual's perception on the importance of GESI for World Vision	1 Do you think that gender-focused project activities are required to increase World Vision's Impact?			
	2 Do you think that specific project activities are required for marginalized people to ensure they benefit equally?			
	3 Do you think that engaging men and boys, and traditional/community/religious leaders helps World Vision to have better impact towards gender equality and social inclusion?			
	4 Is it important for your project that the different dimensions of exclusion (i.e. social, economic or political) are considered? Is it important to consider both the economic implications of having a disability as well as the social stigma associated with having a disability?			
Responsibilities & accountability for integrating GESI	5 Do you believe you are responsible for integrating GESI in your work?			
	6 Have you held others to account for making sure your organization and teams are inclusive, as well as your projects?			
	7 Have you held others to account for GESI results?			
	8 Have you done something additional to ensure the safety of the women and men in your team and your project's beneficiaries?			

Indicators	Questions	Tick		Recommendations
		Yes	No	
	9 Have you displayed inclusive leadership qualities, such as by being accommodating of staff, partners or volunteers with disabilities, or from marginalized communities, professions, religions, etc.?			
	10 Have you mandated equitable participation or set participation targets for your team and/or in your activities?			
	11 Is it important to ensure that women and/or staff from marginalized groups in your project/team are in leadership positions?			
	12 Have you included ways to promote women's decision making abilities within the households in which they live and within the community?			
	13 Have you thought about how the location of your training may have access issues for people living with a disability (e.g. those who are physically disabled or in wheelchairs) and have you developed a plan to mitigate these barriers (e.g. choose training facilities with a ramp or lift)?			
	14 Have you thought about how people who are visually or hearing impaired need different forms of communication and training?			
Knowledge on GESI	15 Do you know how to develop initiatives to address unequal and discriminatory social norms that affect the implementation of projects?			
	16 Are you aware of how the projects will impact on different social groups differently (women, men, children, people with disabilities etc.)?			
	17 Do you understand what prevents women and persons with disabilities from attending project events (e.g. childcare, lack of mobility) and have you developed a plan to mitigate these barriers (e.g. offer nanny stipend, seek husband's permission)?			
	18 Do you know how to address harmful norms, perceptions and attitudes?			
	19 Do you know how to plan to change discriminatory laws, policies, and practices?			

Indicators	Questions	Tick		Recommendations
		Yes	No	
	20 Do you know how to address unequal relations, roles and structures?			
	21 Do you know how to empower women to become leaders and take decisions?			
	22 Do you know how to work with people who live with different kinds of disabilities?			
Capacity building on GESI	23 Have you received any training on how to address gender inequalities through World Vision interventions?			
	24 Have you received any training on social inclusion (considering inclusion of different target groups such as persons with disabilities, different religions, and other marginalized groups)?			
	25 Do you feel that you are equipped to speak out for the inclusion of women and persons with disabilities in all the forums you participate?			

EXAMPLE ANALYSIS TOOL FOR REFLECTION

The following is an example of how World Vision could analyse the data collected from the Individual Assessment. Using Excel, the data collected can be tallied against each person's unique ID number.

To enable disaggregation and granular analysis, please make sure to collect attribute data such as gender and age. Feed in the data collected in paper or electronically into the analysis tool, then mark each response as "X" for each question as it appeared in the data collection sheet. By using Excel, you can build the analysis tool so that it automatically calculates individuals' responses for each indicator and presents the results of individuals' perceptions, knowledge and their roles in GESI. Keep the original data sheets for record-keeping purposes.

Table 3 | Example Quantitative Analysis Tool for Reflection Assessment

Interviewer (by different attribute, e.g. sex, age, position)			Indicator 1						Indicator 2						Indicator 3			
			Q1		Q2		Q3		Q4		Q5		Q6		Q7		Q8	
	Sex	Position	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
P1																		
P2																		
Px																		



Section 2

How to Conduct a GESI Analysis

This section explains GESI analysis as an analytical approach that helps identify, understand and explain the gaps and disparities based on gender inequalities and social exclusion. The section includes one tool:

TOOL 2.1 GESI Analysis

TOOL 2.1 GESI ANALYSIS

There are a variety of ways to conduct a GESI analysis. This tool presents guidance on when, why and how to conduct a GESI analysis, offering four steps that can be useful in this process. A GESI analysis can be used to raise questions, analyze and report information, and develop strategies necessary to increase gender equality and social inclusions. Completing a GESI analysis helps to uncover the social norms, beliefs, practices, and attitudes underlying the differences in individuals' needs, constraints, and opportunities.

WHY CONDUCT A GESI ANALYSIS?

Gender and social norms and power relations influence individuals' differential access to resources and services; aspirations; decision-making; participation; opportunity structures; and overall wellbeing. If these dynamics are not well understood when programs are designed, then inequality will increase by default. We have to do something different or something extra to ensure we are gender responsive and socially inclusive.

A GESI analysis helps to:

Increase personal and institutional awareness and sensitivity to GESI.

Identify different needs, priorities, and vulnerabilities of women, men, girls, boys, PWDs and other vulnerable people.

Understand gender roles and responsibilities - who does what, why, and when?

Understand who has access, control and decision-making powers.

Identify the root causes upholding negative gender and social norms and practices (social relations, institutions, and structures).

Uncover potential positive and negative consequences of program activities on men, women, boys, girls, persons with disabilities and other vulnerable groups.

Identify other differences between people (ethnicity, socio-economic status, and other characteristics) which affect how they experience life and the program's activities.

WHEN SHOULD A GESI ANALYSIS BE CONDUCTED?

A GESI analysis should be conducted at the beginning of a program or during its conceptual stage, to inform program design and implementation. It can also be used during proposal development and the program design stage, during program implementation, as a monitoring strategy, and during evaluations (baseline, midline, or end line).

WHO LEADS A GESI ANALYSIS?

Program and project managers and technical staff, GESI advisors, community facilitators. or consultants who have GESI experience contracted within an external evaluation process..

STEPS ON HOW CONDUCT A GESI ANALYSIS

This GESI Analysis tool offers four steps that can be taken to conduct a GESI analysis:

Step 1	Collective Brainstorming
Step 2	GESI-Responsive Desk Reviews and Secondary Data Collection
Step 3	GESI-Responsive Primary Data Collection
Step 4	GESI-Responsive Data Analysis and Reporting (Refer to TOOL 4.3)

Ideally, a GESI analysis will use all four of the steps, but sometimes that is not possible. Therefore, each step has been designed as a standalone step. If you face budget or time constraints, you might consider doing a combination of any of the steps. The ‘gold standard’ approach is to undertake all four steps; the ‘silver standard’ is three steps, and the ‘bronze standard’ is to do only do one step.



Do a GESI analysis at the beginning of a program, this way GESI can be well planned and budgeted. It is harder to meaningfully retrofit GESI into a program after it starts.

Step 1 | Collective Brainstorming

This step focuses on collective brainstorming to understand who is excluded in a community, the power dynamics involved in the exclusion, and how to ensure full engagement of marginalized groups in development planning. The focus is on identifying information on who the marginalized and vulnerable groups are, the causes of their marginalization and vulnerability, and the relevant others who influence the excluded groups’ expectations and behaviors (reference groups). Collective brainstorming can also help analyze project-level risks, such as potential unintended risk of project exclusion, suggested mitigation strategies, and any other information needed to improve the project’s inclusivity.

WHO PARTICIPATES?

Project team members, local project staff who are knowledgeable, local community leaders, and representative individuals from vulnerable or marginalized or excluded groups. It is critical that vulnerable, marginalized and excluded individuals are represented and participate in this process otherwise we will not understand the whole picture. When including persons with disabilities, ensure that you have a range of impairments represented (visual, hearing, mobility, intellectual and mental).

Direction

Perform the activities below based on the step by step guidance provided. The activities will enable you to identify who might be excluded in a proposed project area and help make visible the dynamics involved in exclusion. After that, you can address the vulnerabilities you identified. The outcomes of the activities should then be consolidated into a coherent idea and recorded in the table provided below.

Facilities and Materials Needed: computer; projector; flip chart and markers.

Human Resources Needed: one facilitator and one note taker.

Step by Step Guidance

1 Set up the group of participants.

2 Use the following questions to guide your collective brainstorming:

- a What different social categories exist in your proposed project area (e.g. persons with disabilities, ethnic, religious, occupational, socio-economic status, caste, etc.)?
- b Which of these categories of people are the most marginalized, excluded or vulnerable?
- c Are there any groups of people who are described in local languages in very negative or derogatory ways? If yes, which ones?
- d In what way are they vulnerable, marginalized or excluded?
- e Which social norms and/or cultural practices exist in this area that may prevent some people from benefiting from the project?
- f Who are the relevant stakeholders or people who influence the exclusion of marginalized or vulnerable groups?
- g Who are the influential group(s) or institution(s) that enforce compliance with exclusionary gender and social norms?
- h How do those influential stakeholders or people, groups or institutions reinforce the social and gender norms that impede social inclusion?
- i What will be the risk of excluding those marginalized and vulnerable in the project?
- j What will be the role of these influential stakeholders or people, groups or institutions in changing the gender and social norms to promote gender equality and social inclusion?
- k How can those excluded, marginalized and vulnerable people be targeted in the project and benefit from the project interventions?

3 Go through each question:

- a Alone, and write down ideas for each question. Jot down what comes to your mind first (10 minutes). Silent reflection is powerful!
- b Work in pairs to share/discuss your answers question by question (10 minutes). What have you written down in common, what else did you think of while sharing?
- c Then work in a group and go through each question to discuss and document the most common ideas and what else might be missing (30 minutes). Select one person to act as a facilitator, which helps to make sure that everyone shares their ideas in the group.

- 4 Next, brainstorm the following questions in a group. Use flip charts to record your answers.
 - a In what ways can your project change the relationship/status of marginalized people within households and communities? (10 minutes).
 - b Which ones out of all the options you list are possible/likely to be addressed by your project? Have each person rank their preference privately (5 minutes). Collate the answers as a group and allow for a discussion on ranking (10-15 minutes). At the end of this you should have at least 3 good/likely to be addressed ideas that the project can include.
 - c What additional information is missing? What else do you need to know to help the project to be more inclusive (to ensure marginalized, vulnerable and excluded people will be included in and benefit from the project)?
 - d How can the additional or missed information be obtained?
- 5 Complete the table below as a team. Under the column headings are references to the specific questions that should help complete the column (e.g. question 2a helps complete the first column).
- 6 Display the matrix on a flip chart and ask the participants to fill out the matrix in plenary (list of marginalized social categories, causes of marginalization/exclusion, list of influential people/groups and institutions reinforce the exclusion, level of exclusion, risk of exclusion, and suggested mitigation strategies for inclusion).
- 7 This will help you understand what information you have already and what additional information you need from the follow up GESI assessments (it could be from literature in step 2 or participatory GESI analysis in step 3 through FGDs and interviews).
- 8 This allows you to develop a more realistic understanding of how challenging the issue may be to address and where you could potentially focus your efforts.

Table 4 | Collective Brainstorming

Marginalized social groups	Causes of marginalization and vulnerability	The relevant others who influence the excluded groups' expectations and behaviors (Reference groups)	Risk of project exclusion	Suggested mitigation strategies	What else do you need to know to improve the project's inclusivity?
2a	2b, 2c, 2d	2d, 2e, 2f, 2g	2b, 2c, 2h	2i, 2j, 2k	4a, 4b, 4c, 4d

This information will be used in step 2.

Be curious! Explore other tools, such as CARE's *Social Analysis and Action Implementation Manual*.

Step 2 | GESI-Responsive Desk Reviews and Secondary Data Collection

TIP!

OVERVIEW

Desk review activities include reviewing literature, collecting and analyzing secondary data, and creating a reference list of important documents related to a topic. If you are conducting this step as a continuation of Step 1 (as opposed to a standalone activity), use the findings from Step 1 to guide your searches. For example, there is no need to search for information on youth if that's not a marginalized cohort identified in Step 1. Ensure to conduct this step according to the GESI domains – see Section 1. It is important that the collected information sheds light on each of the GESI domains.

A GESI desk review identifies important factors affecting various special groups using GESI domains. It also provides important information on the GESI situation explained in literature and helps to verify information that may have changed over time or may not be accurate anymore. Data collected through desk reviews can be used as a baseline for understanding changes due to project implementation. Desk reviews can also be conducted during program evaluations. This will include a review of all program documents and analysis of GESI program objectives and implementation strategies, discussion of GESI issues. This can help to identify gaps that need to be addressed for our programming to be GESI transformative.

Table 5 | Desk Reviews for GESI Data⁹

Type of Document	Information you can collect
Program, project or organizational documents: Work plans, program description, baseline study report, barrier analysis report, monitoring and evaluation plan and other start-up reports	Understanding program context. If GESI perspective have been integrated DME If there are any gaps in GESI integration
Quantitative data: Demographic and health surveys, data from the World Bank, United Nations, and government statistics on GESI domains	Quantitative, GESI disaggregated, contextual information on GESI dynamics within the country/ community
Quantitative data: Third-party GESI studies: GESI analyses or research reports on GESI domains	Qualitative, GESI disaggregated, contextual information on GESI dynamics within the country
Government legislation and policy Documents	Understand legal and political context in which program(s) operate Identifying successes and gaps in the rights of men, women, children, persons with disabilities and other vulnerable groups in relation to the five GESI domains

Desk reviews can be done in two ways: literature review and secondary data collection and can collect both qualitative and quantitative data.¹⁰

⁹ Ramdhani, et. al (2014). Writing a Literature Review.

¹⁰ WFP (2009). Comprehensive Food Security and Vulnerability Analysis.

GESI-RESPONSIVE LITERATURE REVIEW

A literature review is a discussion of previously published information on a GESI related topic or questions. Literature review can collect secondary data both qualitative and quantitative that relates to your topic. This data can help to identify gaps in knowledge and relevant GESI challenges and/or opportunities that need to be addressed.

Step by Step Guidance¹¹

- 1 **Decide on the topic or research question:** This is important because the topic you choose will guide you on the type of information to look for and what to focus on when researching and writing your literature review. Make sure your topic is GESI-responsive and incorporates the five GESI domains. For example: the impact of the level of education on access to health services among women, men, and persons with disabilities in Malawi.
- 2 **Search for relevant literature:** Start by identifying the relevant published materials. Conduct electronic search of books, articles, government documents, or reports on the topic. Use key words and filters that you think can effectively identify relevant materials. For example, an initial search of “the level of education and access to health services” might bring articles that discuss the level of education, access to health services, and gender but which also discuss “social inclusion.” The most recent sources are better (at least within the past 5-7 years).
- 3 **Identify primary sources and databases:** Nowadays, literature review can easily be done online where you can search for electronic documents, reports, and data sets.¹² When materials are not available online, you can check with your local library to see if they have books and articles on the topic. Most libraries offer inter-library loans to borrow books and other materials from other libraries if they don't have the copies themselves. It is important that the identified sources sheds light on GESI domains.

The best sources for literature reviews are primary or original sources such as:

- World Vision and other international non-governmental organization (INGO) reports documenting GESI related programming in a country or region including WV's most vulnerable children's assessment, the caregiver and youth baseline assessments.
- USAID gender and social inclusion assessment for each country.
- UN Women Country reports.
- UNDP Gender Development Index¹³ and the Human Development Index.¹⁴
- UNICEF Multi-dimensional Poverty Index.¹⁵
- World Bank Gender Data Portal.¹⁶
- National Ministry Data (including census and community surveys data).
- National Demographic Household Survey.
- National Gender Strategy/Policy.
- National Social Inclusion Strategy/Persons with Disabilities Policy.

¹¹ Adapted from Rennison and Hart (2019). Research Methods in Criminal Justice and Criminology.

¹² Ramdhani, et. al (2014). Writing a Literature Review.

¹³ Click on the country report for national gender data differences: hdrundp.org/en/content/gender-development-index-gdi

¹⁴ UNDP Human Development Index: hdrundp.org/en/content/human-development-index-hdi

¹⁵ For more information on the statistics used to measure multi-dimensional child poverty see UNICEF (2011).

¹⁶ The World Bank Gender Data Portal: atopics.worldbank.org/gender/

- National Constitutions.
- Evaluation Reports.
- US State Department Human Rights Reports.
- Reports on the Implementation of the UN Convention on the Rights of Persons with Disabilities.
- Reports on the Implementation of the UN Convention on the Elimination of All Forms of Discrimination Against Women.
- Reports on the Implementation of the UN Convention on the Rights of the Child.
- Peer reviewed journal articles

4 **Narrow down the sources:** Examine the title and read abstracts or introduction to identify the right materials and key words that may help you expand your search. An abstract will provide a summary of the objective, methods, findings and conclusion in one paragraph. You may also look at the reference list of materials that you have identified as useful to check any other relevant reference you may need to review.¹⁷ Skim the contents of the books, reports, policies or documents check if there is any chapter or section that is relevant to your topic.

5 **Summarize important information:** Read and analyze important information from each source. Write a summary paragraph for each source. The following information should be included:¹⁸

- The topic and the objectives: this information can be obtained from the abstract, introduction and the conclusion.
- What's the significance of the literature, what gaps was it trying to fill? If the literature is guided by theory, then you need to include this information.
- How were the data collected and analyzed, what time period do the data cover? You can find this information in the methodology section.
- What were the findings/outcomes? What was the conclusion?
- What other themes emerged? It is important that themes you choose reflect on GESI domains. For example, the impact of the level of education on access to safe drinking water for various social groups, or the impact of the level of education on emotional well-being of children.

TIP!

You may want to use some international frameworks to guide your analysis of the literature. Suggestions include the *Harvard Gender Analysis Framework* or *Moser's Gender Planning Framework*.

¹⁷ Rennison and Hart (2019). Research Methods in Criminal Justice and Criminology.

¹⁸ Rennison and Hart (2019). Research Methods in Criminal Justice and Criminology.

THE SYNTHESIS MATRIX TOOL FOR LITERATURE REVIEW

A synthesis matrix can be used to analyze, synthesize and organize the sources in your desk review. First identify ten or more literatures that are closely related to your topic. Then list the author and date of publication for each source, identify the purpose of the literature, the method used to collect data, characteristics of the sample, major findings, the main themes you can extract from the findings, how the findings relates or support information from other sources (similarities), and how they differ from findings obtained from other sources (uniqueness).¹⁹ Then complete the Synthesis Matrix table below.

Table 6 | The Synthesis Matrix Tool²⁰

Source: Article, book, report, policy, etc.	Author and Date	Purpose	Method	Sample	Findings	Similarities	Uniqueness
Source 1							
Source 2							
Source 3							
Source 4							
Source 5							

- 6 **Identify themes, connections, trends and gaps:** Synthesize, analyze, critically, evaluate and summarize information according to themes. Pay attention to connections, trends, gaps. and emerging issues on the topic.²¹ Move sentences from summary paragraphs and put them together into themes. For example, you may say, a review of literature indicates that women with disabilities are more likely to experience lack of access to safe drinking water compared to other social groups. Then look up sentences in each summary paragraph that talks about this. Remember the main point is to identify overall summary of all materials on a theme. Note if there are any ideas in the theme that contradict each other.
- 7 **Decide on the structure and organization of your review:** After summarizing your materials into themes, you need to decide how you will organize them. Start with introduction, followed by the purpose of the literature review. Then organize your reviews into sections, themes and sub-themes.²² For example, you can have a section on the impact of access to safe drinking water. These subsection will be the impact on each groups: women, men, children, persons with disabilities, etc. You may also divide your subsections into themes such as the five GESI domains e.g. the impact of access to safe drinking water on well-being. Then you will discuss how access to safe drinking water have affected each social groups on each domain.
- 8 **Write the review:** Your literature review should have an introduction, a main body, a conclusion and a list of references. The objective of your review will determine what needs to be included in each of sections. After you have written the first draft, you need to read, make necessary edits and finalize it.²³
 - **The introduction:** Should give a general overview, background information, the significance, and the objectives of the literature review. Introduce the themes that you will be discussing in the main body.

¹⁹ Ramdhani, et. al. (2014). Writing a Literature Review.

²⁰ Ramdhani, et. al. (2014). Writing a Literature Review..

²¹ USAID (2014a). Toolkit for Monitoring and Evaluating Gender-Based Violence Interventions.

²² Rennison and Hart (2019). Research Methods in Criminal Justice and Criminology.

²³ Cronin, et. al (2008); Rennison and Hart (2019).

- **The main body:** You may divide the main body in sections and subsections or headings and subheadings for your themes (depending on the length of your review). You should do the following:
 - Summarize and synthesize main points of each source using your own words.
 - Analyze and provide your own interpretation of the findings.
 - Provide a critical evaluation of the strengths and weaknesses of your sources.
- **Conclusion:** Summarize important findings and their significance to women, men, persons with disabilities and other vulnerable groups. Remember you are summarizing the main points of all your literatures, so do not introduce any new themes or new research at this point. Identify problems, unresolved issues, gaps and opportunities for further research. Provide recommendations on how future research may fill the gaps or address problems you identified from literature.²⁴
- **References:** You should provide a full list of all the books, journal articles, reports, and other literatures which you referred to in your review. You will need to format your references according to the style guide that you choose. Make sure you include every source that you used in the text and sort your references alphabetically by last name.

A COUNTRY PROFILE

The country profile provide an overall background on GESI situation in a country regarding various systems and how these systems affect different social groups. It also helps to identify GESI promising or best practices, opportunities and discrepancies, and provide information of how systems affect social and economic rights, and cultural and political rights of various social groups. Gender inequalities and social exclusions are not confined purely to household and family relationships. They are reproduced across various institutions. These institutions are interconnected and interrelated. A change in the policy or practice in one institution may bring about a change or affect others. Therefore, it is recommended that a country profile looks at all these institutions together.²⁵

Directions

- The country profile should start with a GESI-responsive literature review. Identify existing literatures and data sources for that country. Include GESI-disaggregated statistics if available. If such data are not available, make a clear statement about that.
- After literature review, you may need to interview with key actors in Ministries, NGOs, civil society organizations, local institutions, etc. Special attention should be given to perspective on women, men, girls, boys, the elderly, persons with disabilities and other vulnerable groups.
- The country profile should not be more than 30 pages. Additional information can be provided in annexes.²⁶ The table below is the country profile tool that has been adapted from Sida (2010).

²⁴ Cronin, et. al (2008). Undertaking a Literature Review.

²⁵ March & Mukhopadhyay (1999). A Guide to Gender-Analysis Framework.

²⁶ Sida (2010). Guide to the Elaboration of Country Gender Profiles.

Table 7 | A Country Profile²⁷

System item	Information to be included
Summary	<ul style="list-style-type: none"> Brief summary of GESI situation
Governance, power structures and GESI	<ul style="list-style-type: none"> Any efforts to combat gender inequality and social exclusions Any institutions or power structure that continue to produce social norms that uphold current gender inequalities and social exclusion
National framework (policies, laws, strategies, programs and initiatives)	<ul style="list-style-type: none"> Formal laws, policies, institutions or programs in place that area aimed at promoting GESI e.g. National Action Plan, Poverty Reduction Strategy The extent to which they promote GESI The extent to which they contain explicit biases towards women and other vulnerable groups
Social norms/ Customary laws and institutions	<ul style="list-style-type: none"> Social norms/customary laws and practices aimed at promoting GESI The extent to which they promote GESI The extent they contain explicit biases towards women and other vulnerable groups
Justice and human rights	<ul style="list-style-type: none"> Signed or adopted international human rights instruments e.g. CEDAW Legal framework (e.g. constitution, inheritance, land tenure, housing rights, family law, and labor laws), law enforcement and equal access to justice. Information on legal pluralism (customary laws, religious laws and civil laws) Which laws indicate the following: <ul style="list-style-type: none"> Promoting GESI Gender inequality and social exclusion Protection and rights to children Decreasing violence against women and other vulnerable groups Improving women's access to reproductive health services
Political situation	<ul style="list-style-type: none"> Participation and the ability to influence decision-making at all levels Government's capacity to create an enabling environment for political participation of women, and other vulnerable groups and deliver services unbiased by gender.
Socio-economic situation	<ul style="list-style-type: none"> The poverty situation, distribution of resources and time, and how this affect different social groups Gender roles, access to resources and services Social services (e.g. health and education) and how they meet human needs and rights of men, women and other vulnerable groups
Gender-based violence	<ul style="list-style-type: none"> Different forms of gender-based violence (female genital mutilation, sexual and domestic violence, etc.) Violence against vulnerable population (e.g. children, the elderly, persons with disabilities) Preventive and legal measures to combat gender-based violence Service and care for victims of violence and who has that access

System item	Information to be included
Conclusion: Challenges and opportunities	<ul style="list-style-type: none"> • Areas showing a potential for making progress • Specific areas of concern and constraints • Anything missing (e.g. laws on non-discrimination, gender equality, gender-based violence, sexual harassment, human rights, social inclusion, etc.) • Strategic areas that need further research • Based on that conclusion, what gaps do you see, which of them the project would address to enhance GESI • Recommendations for transformative GESI systems

GESI SECONDARY DATA COLLECTION

This refers to gathering GESI data that was collected by someone else. Secondary data can provide both qualitative and quantitative information on various GESI issues such as trends, gaps, and opportunities related to your topic. Most secondary data sources are publicly available, for example, official statistics such as census, household and demographic surveys, community surveys, research reports, UNICEF, USAID, World Bank databases, National polices, scholarly journals, reference books, literature reviews, etc.²⁸ In addition to demographic information such as age, disability status, income, level of education, religion, ethnicity, etc. secondary data sources can provide information on five GESI domains across all sectors. Secondary data can be used in collecting baseline data, identifying conditions, challenges, and external factors that might affect the implementation and performance of GESI-responsive programs.²⁹ You may also gather information on how other similar programs dealt with these challenges.

Steps for collecting secondary data:³⁰

- 1 Identify your topic, the purpose of data collection and the type of information you need to answer your questions and meet your goal.
- 2 Locate available data sources– identify who is more likely to have collected the information you need. The best starting point is the World Vision documents, government documents, official statistics and international development data from World Bank, USAID, UNDP, FAO, WHO, ICRW, etc. If you are looking for a local level data, you may need to look into local NGOs reports and other publications.
- 3 Pay special attention to collecting disaggregated data by sex, disability status, age, and other social characteristics.
- 4 Determine how you can get access to the data you need.

²⁸ USAID (2014a). Toolkit for Monitoring and Evaluating Gender-Based Violence Interventions.

²⁹ USAID (2019). Data Collection Methods and Tools.

³⁰ CARE (2005). Tips for Collecting, Reviewing, and Analyzing Secondary Data.

Table 8 | Guiding Questions on Secondary Data Collection

Question	GESI Domain
Are there available statistics that show GESI related disparities in accessing, or making decisions over, important resources and services?	Access Decision-making
Are women disadvantaged compared to men, and if so, how? (e.g. education/literacy rate, health statistics)?	Participation
Are persons with disabilities or other marginalized social groups disadvantaged, and if so, how?	Participation Access
Are data on the Washington Questions ³¹ collected for the country and what are the results (prevalence of persons with disabilities and their status) (for e.g. people impaired with seeing, hearing, walking, concentrating/remembering and communicating with customary language)?	Well-being Participation
What areas do national policies (e.g. National Women/Gender Policy; National Disabled Person's Policy; Child Welfare Policy) focus on? What indicators are used?	Systems
Are there gaps between national statistics and the national policy focus on gender equality and social inclusion?	Systems
Are there any GESI related regional differences and pockets of vulnerability that have been identified in the country that might affect program design and implementation?	Well-being
Are the national policies socially inclusive? How? Who are the policies including?	Systems
Are there any traces of informal/social norms of exclusion in the national policies?	Systems

The following are two examples of GESI secondary data that you may collect.

Example 1: Secondary Data on Well-being

Community well-being information can be obtained from secondary data sources such as census, community surveys, government ministry reports, and other research reports. The table below can help guide you as you collect important secondary data on well-being, which is one of World Vision's GESI domains. You can get data for women, men girls, boys, persons with disabilities and other vulnerable groups. Add columns for other vulnerable groups as needed.

31 For more information on the Washington questions please visit www.washingtongroup-disability.com/washington-group-question-sets/short-set-of-disability-questions/

Table 9 | Secondary Data on Well-being

	Women	Men	Girls	Boys	Persons with disabilities
Material Well-Being					
Age distribution					
Education level					
Average income					
Employment					
Food security					
Housing quality					
Access to quality services e.g. health, education, water, etc.					
Relational Well-Being					
Family stability					
Belong to a religious group					
Victim of crime/violence					
Feeling safe and secure in the household and community					
Suicide rates					
Receives protection during emergency					
Subjective Well-Being					
Feels empowered					
Feels valued and respected					
Feels confident					

Example 2 | Secondary Data on Gender and Social Norms

Secondary data on gender and social norms can be obtained from household surveys done by various international institutions such as Demographic Health Surveys (DHS), UNICEF's Multiple Indicator Cluster Surveys (MICS) and the World Bank's Living Standards Measurements Survey (LSMS). Usually surveys from these institutions are carried out in partnership with national governments and provide disaggregated data by gender, social and demographic characteristics (such as age, income, education level, etc.) collected from large sample sizes.³² In the table below, the ODI(2015) provided an overview of data that are available on gender and social norms from various household surveys conducted by these international institutions.

Table 10 | An overview of available data on gender and social norms from major household surveys³³

Survey type	Harmful traditional practices	Strategic life decisions	Use of resources
MICS	Early marriage/early childbirth Female genital mutilation/cutting (FGM/C) Domestic violence (attitudes towards it)	Educational attainment (by gender) Differences in age and education level of spouses Sexual behavior Health-seeking behavior	Ownership of dwelling, agricultural land, livestock (disaggregated by gender)
DHS	FGM/C Domestic violence (prevalence and attitudes towards it) Early marriage / childbirth	Educational attainment Employment and occupation Family planning Women's opinions on whether a woman can refuse sex with her husband Hurdles faced by women in accessing health care Freedom of movement	Asset ownership Control over own earnings Differences in age and education level of spouses Women's participation in household decisions
LSMS		Educational attainment (with a specific question on why a child is not attending school) Who makes most household decisions	Decisions over use of resources received as 'additional income'

³² ODI (2015). What Can Internationally Comparable Quantitative Data Tell Us About How Gender Norms are Changing?

³³ ODI (2015). What Can Internationally Comparable Quantitative Data Tell Us About How Gender Norms Are Changing?

Step 3 | GESI-Responsive Primary Data Collection

There are variety of methods you can use to collect primary data. The most common ones include household surveys, Focus Group Discussions (FDGs), key informant interviews, in depth interviews, and observations (participant or non-participant observations). These methods enable practitioners to grasp context specific factors that affect the lives of excluded social groups and address them through project interventions. This step draws examples from FDGs and household surveys. Before you undertake these methods, consider the issues listed in Table 11 that will improve the likelihood of gathering GESI-responsive data. consider before data collection.

Table 11 | Planning for GESI-Responsive Data Collection

Things to consider	Rationale	Example
Identify objectives for collecting GESI-focused data (about 2-3)	To inform decisions on how to address gender inequalities and social exclusion.	<ul style="list-style-type: none"> • If the program is focused on child protection in a humanitarian setting, a data collection objective may be to capture how boys and girls access basic services. • If the program is focused on improving food security, a data collection objective may be to measure how gender and social norms influence decision-making over food expenditure.
Map participants and data sources	Represent vulnerable groups.	<ul style="list-style-type: none"> • Collecting data from people related to participants e.g., for projects targeting children, consider parents and teachers as key informants. • However, key informants shouldn't be a substitute for the voice of vulnerable groups e.g., people with disabilities.
Plan for disaggregation	Develop a complete understanding of participants and how to respond to their unique needs.	<ul style="list-style-type: none"> • Disaggregation should include different sex and social attributes. • For example, when examining female-headed households, disaggregate by sex, age, marital status, disability status, etc.
Select methods	Should align with the objectives and vary according to type of participants.	<ul style="list-style-type: none"> • GESI-responsive approaches promote a mixed methods approach, drawing from qualitative and quantitative methodologies for data collection and analysis that's is appropriate for the target group. • Align method to program and data collection objectives.
Consider potential risks and ethics	To integrate measures and precautions to protect respondents' rights, dignity, and welfare.	<ul style="list-style-type: none"> • If it is culturally inappropriate for a male interviewer to interview a female respondent in her home, make changes in location, interviewer/facilitator, or the collection method.
Pre-Test	Determining whether methods and questions are suitable for the audience	<ul style="list-style-type: none"> • Pretesting should mimic the real data collection scenario, but on a much smaller scale. • It is also an opportunity to pre-test specific tools with specific demographics, where relevant, such as persons with disabilities.

FOCUS GROUP DISCUSSIONS (FDGS)

There are 4 examples of FGDs that can be used separately or collectively, depending on how much information is needed:

FGD 1: helps understand vulnerability.

FGD 2: is a social mapping to aid in understanding the different levels of access and control over resources and services among the different groups (men, women, youth, disabled people, and other excluded people), where different groups/identities spend most of their time, and where they travel to. This can help in identifying strategies to improve marginalized or excluded people's access to and control over important resources and services through ensuring the participation of the excluded people in the project and their benefits from the projects. It helps also to identify appropriate places for training.

FGD 3: is the analysis of roles and workloads to help program staff (and participants) see who does which tasks and how their time is spent in each day.

FGD 4: is a gender and social norms assessment.

WHO PARTICIPATES?

Project team members, local project staff, community members, community development workers and researchers

For each of the four FGD types above, hold at least four separate discussions (16 in total). The types of people who should participate in each discussion is context-dependent and the FGDs can be organized in different ways, but generally it is recommended that one group is held with women only (make sure that married women and women heading/leading the family are represented in the group); one with men only (make sure that single men are also included in the group); one with people with disabilities (mixed gender) and one with youth (mixed gender). If time and budget resources permit, youth can be divided into two separate, gender segregated FGDs and disabled people in 2 separate, gender segregated FGDs.

It must be emphasized that the above is a suggestion only. The types of people who should participate in each discussion is context-dependent, and may include sex-disaggregated groups for people with disabilities, unmarried people, widowed people, etc. It is important to check your assumptions (e.g. a mixed-gender group of youths still has gender dynamics to consider).

Some of the FGD tools used below are visuals (such as social mapping, mobility mapping and daily activity clock) that could enhance active participation in and contribution to the discussion by most of the participants and increased their understanding about the issues under discussion. For example, the visual tools allow participants with low literacy, the hearing-impaired and persons that struggle with concentrating/remembering to easily keep track, understand and contribute to the discussions.

However, the facilitator must make sure that persons with disabilities have the additional and required assistance, such as sign language translators during the FGD and enhance their participation and benefit from the discussion, as these visual tools are not adequate for persons who are seeing-impaired. In this case special support is needed.

TIP!

If these FGDs are not appropriate to your needs, or you simply want to explore other tools, have a look at CARE's *Social Analysis and Action Implementation Manual* – particularly the Gender Box tool.

Step 4 | Analyzing and Reporting GESI-Responsive Data

Analyzing FGD data

Refer to Tool 4.3 – Analysis Guidelines for more comprehensive guidance. Analyzing data from FGDs is like analyzing data from other types of methods, such as individual interviews. For each of the four FGDs listed above, the following process can be followed:

- a Ensure all comments from FGDs are transcribed
- b Sort comments from different FGDs under individual question numbers (e.g. for Question 1, comments from female-only FGDs and male-only FGD should be combined under the 'Question 1' heading).
- c For each question, note the principal ideas that occur in the discussion of answers
- d Note to see which principal ideas reoccur. Bear in mind that sometimes the same idea occurs in answers to different questions.
- e Think critically about these recurring ideas to identify themes. A theme may include multiple ideas.
- f Identify pull-out quotes that adequately summarize each theme.
- g Use these quotations to write an engaging and cohesive narrative about the themes.
- h If Steps 1 and 2 of this guide have been completed, include a discussion on how these themes are similar (or different) from the findings in Steps 1 and 2.

FGD I: Understanding Vulnerability

This activity deals with collecting data on vulnerabilities that certain social groups may face in a community and factors that may limit their participation in a project, or that may limit their opportunities. The tool includes step-by-step guidance which explains how to identify vulnerable groups and individuals. The goal is to identify vulnerable groups in the community; to understand the extent and level of vulnerability or exclusion of a certain groups; to locate vulnerable or excluded groups for further interviews and targeting and to stimulate discussion on the causes and forms of vulnerability and exclusion.

Direction

Write down the age, sex, disability status, marital status, mother tongue, location and religion for each of the group participants. There is no need to take names of members.

Materials Needed: Flip chart paper; marker and beads or stones, map of the community

Human Resources Needed: One facilitator; one notetaker; one observer

Time: 1.5 – 2 hours

Refreshments: Water, juice, or light snacks as appropriate - FGDs can be long and may be tiring for participants

How to use this tool

This tool includes step-by-step guidance which explains how to identify vulnerable groups and individuals. But there are important steps to take and things to consider before and during data collection. Before applying this tool, the research team needs to refer to the output of steps 1 and 2 on the type of vulnerable or marginalized or excluded groups that will give tips to identify groups for this FGD and to identify which individuals should be selected as participants in each FGD.

Step by Step Guidance

- 1 Ask participants what their community's definition of 'vulnerability' is. This will anchor people's minds and set the right tone. Make note of this definition.
- 2 Place a piece of flip chart paper on the ground. Draw three separate boxes (representing 'most vulnerable', 'vulnerable' and 'not vulnerable' people in their communities) on the paper.
- 3 Based on participants' definition of 'vulnerability', probe participants what criteria they use to categorize people as 'vulnerable' and 'non-vulnerable'. Then ask them to characterize 'most vulnerable', 'vulnerable' and 'not vulnerable' people in their communities. Critically attend to points of agreement and disagreement and jot them down in your notes. This will help to:
 - a Characterize each vulnerable or excluded group (e.g. HIV-positive, single mother/female-headed household, persons with disabilities, ethnic minorities, poor etc.).
 - b Understand their access to, control over, and decision-making power over important resources and services they have.
 - c Understand their participation in and benefit from community and public services including projects.
- 4 Ask participants why those groups are vulnerable. Ask this question for each category (e.g. why are person with disabilities vulnerable?).
- 5 Provide each of the discussants with 10 beads and ask them to estimate the proportion of 'most vulnerable', 'vulnerable' and 'not vulnerable' in their communities by distributing the beads across the categories. This **must** be preceded by explaining the categories to the discussants based on the characteristic of each category explained by the participants.
- 6 Probe for the vulnerabilities in terms of food security, access to education, health, water sources, social protection, vulnerability to environmental or climate problems, natural disasters, limited land, ability, number of children, etc. Note that the characteristics in the previous steps might also be vulnerabilities in and of themselves.
 - a This will allow you to understand the challenges and opportunities that different social groups have in accessing the different resources and services.
 - b From the identified vulnerabilities – ask participants which one act as barriers to social protection. Rank them.
- 7 Ask the participants to identify the ten most vulnerable families in their community and identify also the location of these ten most vulnerable families in their community (consider also gender, marital status, age, class, etc.) based on the characteristics and vulnerability criteria discussed in the previous steps.
- 8 Ask the participants which category ('most vulnerable', 'vulnerable' and 'not vulnerable') is usually included in development or social protection initiatives. Probe why.
- 9 Ask the participants to discuss how each vulnerable group can participate, be included and targeted in an intervention.
- 10 Ask the participants how and in what way the vulnerable or excluded groups can benefit from the project.
- 11 There may be overlap between the questions above, or in the following FGD, or differing levels of engagement from the participants. That's ok – just make sure that overall people continue to be engaged and understand the activity. Don't hesitate to adapt on the fly and skip certain questions if they do not resonate. Just keep the discussion moving.

12 Complete the table below as a group. Now that you have thought and discussed more deeply about the vulnerability.

- Display the matrix on a flip chart and ask the participants to fill out the matrix in plenary (vulnerability category, cause of category, individuals under each category, characteristic of groups etc.). From the discussion you had, facilitate the group to fill out the matrix below as an output or summarized result on the information collected in FGD 1.
- This will help you understand what information you have already and, what additional information you need from the follow up GESI assessments.
- Again, this allows you to develop a more realistic understanding of how you can be more inclusive and address the exclusion of vulnerable groups through targeting them in the projects as beneficiaries.

Table 12 | Vulnerability Ranking

Vulnerable category	Characteristic of the group differentiate their level of access, decision-making, participation, opportunity and well-being)	Causes of vulnerability	Proportion of each category in the community	Who are the individuals/families?	Suggested strategies to include the vulnerable groups in the project and enhance their participation as much as possible
Most vulnerable					
1.					
2.					
3.					
Vulnerable					
1.					
2.					
3.					
Not vulnerable					
1					
2					
3.					

TIP!

During FGD, you may need to watch for the words that community members use to describe certain groups of people as there may be some derogatory and discriminatory use of language that would be worth exploring. Part of your ground rules should include guidance for respectful language.

FGD2: Social Mapping

This activity helps to understand the different social groups' and individuals' access to and control over resources and services. Moreover, it helps to understand the movements and mobility of different social groups by developing a social map.³⁴ While developing the social map, this tool is useful to support the conversations and discussion about power, and gender and social norms and probe participants about the decision-making power they have over the important resources and services. The data obtained through this FGD can be important for targeting vulnerable social groups for project interventions, such as training or meetings and enhancing the participation and benefit of marginalized and vulnerable people in the project. This will also ensure their access to, and control over important resources and services are improved.

Objectives

- To assess the difference in access that different social groups (women, men, boys and girls, persons with disabilities etc.) have to important resources and services required for their well-being
- To assess their control over those important resources and services
- To identify factors (related to social norms and structural inequalities) affecting the difference in access to and control over resources and services
- To identify opportunities and challenges that ensure equal access to and control over resources and services to different social groups
- To identify activities and interventions that enhance equal opportunities for different social groups (women, men, boys and girls, people with disabilities etc.)

Directions

Write down the age, sex, disability status, marital status, mother tongue, location and religion for each of the group's participants. There is no need to note down the names of members.

If the participants are broken into groups by gender, the discussions can focus on developing social maps from men and women's perspectives, how these are different for the opposite groups, what the differences are and why. If it is broken by different age groups or groups of married and unmarried people can also be formed to generate discussion on contrasting maps.

Though this activity is powerful, in terms of enhancing the participation and understanding of participants from different social groups (illiterate, persons with some disabilities such hearing, remembering/ concentration), the tool is unfriendly to the visually impaired. So, in order to make the tool inclusive for visually impaired people, during the social mapping exercise the facilitator should ensure they have assistance that explains each and every process and detail to them. Moreover, they have to be given the chance to share their experience how they access the different resources and services mentioned during the discussion (oral mapping). Social mapping helps the community develop areas of change and how to plan for that change.

Materials Needed: Flip chart, card, marker, ash/chalk (if the map is drawn on the ground)

Human Resources Needed: One facilitator and one notetaker

Time: 1.5 hours

Refreshments: Water, juice, food or as appropriate to context and participants

Step by Step Guidance

- 1 Explain the purpose of the FGD and answer any preliminary questions. Give people the opportunity to recuse themselves based on this clarification. Make sure everyone understands what's going to happen and what the end result will be.
- 2 Ask FGD participants to draw a social map including the mobility map in groups.
 - a Identify one or two person to volunteer to draw the map. Though these two participants do the actual drawing, the rest of the participants will contribute to the drawing by providing ideas and showing the specific location of resources and services on the map.
 - b First ask participants to draw a map/boundaries of the community on the ground or on flipchart. It is useful to start with the spot where this meeting is happening as reference or a major landmark such as a road leading through the village.
 - c After completing the map (or community boundary), ask the participants to draw/locate important infrastructure (such as roads, drainages and etc.), institutions (such as health center, schools, local government offices and etc.) and public services/resources (such as public/project-water points, forest, electric lines, market, shops, religious centers, and etc.) using symbols or pictures.
 - d Then ask the participants which places they have visited (could be boreholes, rivers, local pubs, health facilities, church, garden, public meetings, schools, chief's camp, markets, etc., or they could be the names of nearby towns).
 - Next, ask how many times people visit these places each month and the reasons for visiting.
 - Use different types of lines (such as dots, dashes, different colors) to indicate the purpose and frequency of visits. E.g. thick line equals very frequent, thin line is for occasionally and dotted line is for very rarely
 - e After the social map is completed, ask one of the participants to explain the map by providing brief illustration on what the social and public resources and services existed in the community in reference to the social map they developed. Give them also a chance to incorporate if they have missed any resources and services.
- 3 Ask the participants to assess the map in pairs. One-person questions and the other person answer the questions. Consider any appropriate criteria for pairing up the persons (e.g. men with women, person with disability with able people).
 - a Post the social map drawn in a place where everyone can see and use the map as reference while they are holding the discussion
 - b Ask the participants about their access to and control over resources and services mentioned in the social mapping
 - c Ask the participants which are the places/services and resources that are accessed only by specific group (for e.g. men/women, girls/boys, people with disabilities)? Why?
 - d Ask the participants which are the places/services and resources that are not accessed by specific group (for e.g. men/women, girls/boys, people with disabilities)? Why?
 - e Are there specific areas where specific members of the community reside? Do they face any kind of discrimination?
- 4 As a group show the map and ask:
 - a Where are people belonging to the vulnerability categories in FGD 1 more likely to be found?
 - b Based upon the information provided, where would these people feel the most comfortable participating, such as in a training workshop?
 - c Where should advertisements for community or project meetings be posted to reach this category of people?

- 5 Ask the participants about their participation and decision-making power over the resources and services mentioned in the social mapping
 - a Display the matrix below in a flip chart on the ground.
 - b Select the resources, institutions and other projects' and public services identified in the social map and enter them in the matrix.
 - c Ask participants to prioritize the top five resources and services that are important to be involved in the project intended.
 - d Ask participants to identify who has the decision-making power over each specified resource, institution and service. Provide 10 seeds³⁵ to the participants as a group and ask them to distribute the 10 seeds across the column according to their share of decision-making or who mostly decide on the resources and services. The group who does not have any decision-making power on the specific resources/services will get 0 seeds, while a group that has sole decision-making power will get 10 seeds.
- 6 At the end of each group presentation, write down the most common answers and use this in your targeting strategy.

Note: When collecting information on access and control of resources and services, it is also important to probe and get more details on structural and socio-cultural factors that may affect these:³⁶

- Demographic factors including household composition and household headship.
- General economic conditions, such as poverty levels, inflation rates, income distribution, and infrastructure.
- Cultural and religious factors.
- Education levels.
- Political, institutional, and legal factors e.g. National policies around legal ownership of assets and resources (e.g. women's ability to legally own assets without male permission, joint ownership, ability to make asset-related decisions); National policies around women's and other vulnerable groups access to land, water, and other resources; National policies around inheritance; Entitlements to services such as health, education, etc.

³⁵ Adapted from Jayarakan (2002). The Ten Seeds Technique.

³⁶ Srinivas (2015). Towards A Gender Analysis Framework.

Table 13 | Social Mapping

	Access				Control			
	Women	Men	Girls	Boys	Women	Men	Girls	Boys
Resources								
Land								
Water sources								
Technology								
Credit								
Agricultural equipment								
Services								
Education								
Health								
Sanitation								
Extension services								

TIP!

The facilitator needs to decide if the participants develop the social map and discuss on the services for their own group or both for themselves and the other parallel group (e.g. if the FGD is women only either they discuss on their access to different social services and resources only for themselves or they will discuss for men as well).

If the FGD is with people with disabilities, for the social mapping exercise you will need to arrange different assistance as required for participants' needs.

There may be overlap between the questions above or differing levels of engagement from the participants. That's okay – just make sure that overall people continue to be engaged and understand the activity. Don't hesitate to adapt and skip certain questions if they do not resonate. Just keep the discussion moving!

FGD3: Analysis of Roles and Workloads

This activity helps to identify gender-specific roles and different workload for different social group (women, men, girls, boys, persons with disabilities and other social groups). The daily activity chart is a tool that asks community members to examine the different kinds of tasks/activities carried out in a day and the different workloads of women, men, girls, boys, persons with disabilities and another social groups. Side-by-side illustration of the different roles and activities performed by different social groups in a typical day reveals information about who works the longest hours, who concentrates on a small number of activities, who divides her/his time between many activities, and who has more leisure and sleep time. It can also illustrate seasonal variations in women's and men's work. To do this, you will carry out the activity clock exercise several times based on the number of seasons in the location. This tool has been adapted from ACDI VOCA's (2012)³⁷ and can be adapted to examine social groups other than those differentiated by gender. Simply add columns to the table below to account for other social groups (such as persons with disabilities).

Objectives of the daily activity chart

To collect data on women and men, girls, boys, person with disabilities, and other social groups that will help us to:

- Understand the different roles and time use and assess their workload.
- Understand how the different roles affect their time use and participation in the program.
- Assess the different constraints and opportunities that could prevent or facilitate their active participation in and benefit from the program.

Directions

Write down the age, sex, disability status, marital status, mother tongue, location and religion for each of the group participants. There is no need to write down names of members.

The facilitator needs to decide how the participants should be divided into focus groups based on the local context, such as women-only and male-only, by age, etc. and whether persons with disabilities will be a separate FGD or mixed with people without a disability.

Materials Needed: Seeds/Stones, flip chart, markers

Time: 1.5 hour

Human Resources Needed: One facilitator and one notetaker

Refreshment: Juice, water and some food. FGDs can be long and tiring without replenishments

Step by Step Guidance

The facilitator needs to decide whether the participants should be divided into focus groups based on the local context, such as women-only and male-only, by age, etc. and whether persons with disabilities will be a separate FGD or mixed with persons without disabilities.

- 1 Ask the participants to list down the activities of women and men, girls and boys in their daily r chart.
 - a Draw two circles in advance to form the “daily activity chart” on a flip chart or the ground.
 - b Ask participants to discuss a typical day in the life of women, men girls and boys in their household or community. Tell them you will be illustrating tasks carried out by women, men, girls and boys throughout a typical day. The facilitator may need to define what a chore is.
 - Ask participants in the women’s groups what a woman or a girl does from the moment she wakes up until the moment she goes to sleep.
 - Then ask the other group (men’s group) to do the same thing for the men (what a man and a boy does from the moment he wakes up until the moment he goes to sleep).
 - c Someone will likely give you an overview. Then ask them to tell you hour by hour. Using the circle “clock” on the flip chart, illustrate how they spend each hour of their day from sunrise to sunrise. Include leisure and rest time, paid and unpaid work.
 - d Probe the participants to add more activities if the facilitator notices some activities have not been discussed.
 - e Make sure you inquire how long each activity takes to complete. Activities carried out simultaneously, such as childcare and gardening, can be noted in the same spaces.
 - f At this point, you will have mapped out a complete day for both women and men onto your clocks from different groups (persons with and without disabilities).
 - g Lead the group in a discussion about the workloads and schedules of women and men and across seasons (if applicable and if time allows).
- 2 Ask any follow-up questions and take notes on responses during the plenary to understand the different time use of men and women and its implication on workloads and their participation in the project activities.
- 3 From the daily activity clock exercise, identify the different types of chores for women, men, girls and boys.
 - a The facilitator will assist the participants to list domestic/household tasks (e.g. cooking, milking, etc.), productive tasks (e.g. farming, cultivation, weeding, selling goods, etc.) and community tasks. These are suggested categories – you don’t have to use them if they don’t seem appropriate.
 - b Facilitate a consensus on the top five tasks under each category (in terms of daily amount of time spent). Note that the note taker may be a crucial resource here for the sake of recording people’s votes and reaching consensus.
 - c Draw a table showing the different categories of people and the sourced list of tasks and spread it on the floor.
- 4 Ask the participants to discuss and show the gender differences in roles and responsibilities.
 - a Display the matrix below on the flip chart or on the ground to be filled,
 - b Provide 10 seeds to participants as a group and ask them to distribute the 10 seeds across the columns according to their share or responsibilities who mostly performs each of the tasks specified. The ten seed technique can help used to understand the share of gender roles by different social groups.³⁸ If the group does not have a role on the specific task then it will get 0 seeds, while the group who has sole responsibility will get 10 seeds.

- 5 Ask participants to explain how long it takes to complete the task and where each task takes place. Information on where the activity took place helps to understand people's mobility.
- 6 Ask the participants to discuss the results. Facilitate the discussion so that the participants reach consensus. Always attend to points of disagreement and note them down.

Notes:

- Make sure you probe participants to explain who does most of the work even if sometimes they may say the work is done by everybody. It is possible one person is doing twice as much work.
- Provoke open-ended discussion regarding the participation of other social groups in daily activity e.g. persons with disabilities, people living with HIV/AIDS, etc. (Please add excluded groups as needed depending on the context).
- Gather their opinions on whether they approve or disapprove the current arrangements, and why.
- Probe them to explain if these activities will vary by season, e.g. rainy and dry season.

Table 14 | The Daily Activity Chart

Tasks/Activities	Who does most of the task?				How much time does it take to complete the task?			
	Women	Men	Girls	Boys	Women	Men	Girls	Boys
Reproductive Tasks								
Cleaning and washing								
Food preparation								
Care for the sick								
Childcare								
Collecting water and fuel								
Feeding the cattle								
Productive Tasks								
Agricultural activities (specify e.g. planting, weeding, harvesting, livestock rearing, fishing, etc.)								
Formal employment								
Selling goods and services								
School related								
Skills and capacity building training or workshops								
Other non-farm activities (specify e.g. tailoring, construction work, carpentry etc.)								
Community Tasks								
Cleaning a community water source								
Volunteering at a local school								
Attending community meetings								
Political rallies								

FGD4: Gender and Social Norms Assessment

This FGD helps to identify social and gendered norms of behavior in a community. While not technically an FGD (because specific voting questions are asked), the aim is that the exercise will generate interesting discussion after each question and will enable a richer understanding of the social and gender issues in the community. Understanding norms of behavior will help to understand how socio-cultural norms and practices affect women and men, girls and boys and other social groups.

Direction

Write down the age, sex, disability status, marital status, mother tongue, location and religion for each of the group participants. There is no need to write down names of members. Remember to adapt the procedures for this FGD according to what is contextually appropriate.

Materials Needed: Blue and red color cards, secrete ballot box or use local alternative materials.

Time: 45 minutes – 1 hour

Human Resources Needed: One facilitator and one notetaker

Refreshment: Juice, water and some food. FGDs can be long and tiring without replenishments

Step by Step Guidance

- 1 You will need blue and red color cards and a secret ballot box
- 2 Provide one blue and one red color card to all the participants
- 3 Read the following instruction aloud standing in front of the participants:
 - a In a community where people are **unlikely** to be influenced by others, tell them:
 - I am going to read you a series of comments and I want you to think about your answers. Vote for each question using the cards.
 - Raise a blue card above your head if you agree with the following statements and raise a red color card if you disagree. If you don't know, keep your hands down.
 - b In a community where people are **likely** to be influenced by others, tell them:
 - I am going to read you a series of comments and I want you to think about your answers. Vote for each question using the cards.
 - Ask them to secretly vote for each statement using the different colored card: use blue card if you agree with the following statements and use a red color card if you disagree. Put a color card for each statement in the secret ballot box, and if you're not sure about the statement don't put anything in the box.
 - At the end the blue and red votes will be counted and tallied.
- 4 Make sure that everybody has understood the instructions and start reading the comments from the table below.
- 5 Record the answers after each question (or the total tally if you're using the secret ballot box method).
- 6 After each question, probe participant to get their opinion if the behavior is approved/not approved in that group and why. For example, if women are not allowed to legally own land, find out if women themselves approved or don't approve this norm.

- 7 Probe participants to explain the reason behind a social norm. For example, why is it usual for men to hit their wives and not the other way around?
- 8 Ask then what are the social consequences of breaking a norm of behavior and how much expected social sanctions for breaking the norm influence how people behave. Will they still behave the same way if there was no consequence?
- 9 Probe to participants to discuss the application of social norm to other social groups such as the
- 10 Ask if anyone wants to make a comment or discuss their answer. When they say something, probe for more details. It is ok to allow a conversation to flow from these topics.
- 11 If you have the time, allow a discussion to occur after each question as it can provide useful nuance around behavior norms. It also helps you to understand the type of community you are working with. Using vignettes and question prompts can also be helpful.
- 12 This tool is simple but effective in helping people question the way they have always thought.

Table 15 | Gender and Social Norms Assessment

[Make note of the number of blue and red cards and how many people do not choose]

Statement	Blue= agree	Red= disagree	Don't Know
In my community women are happier when men do a greater share of the household work.			
A woman feels comfortable asking her spouse to help her with the housework			
In my community men are teased when helping their wives with the household chores.			
The main reason men help their wives less often is because the community teases/reprimands them			
In my community men are proud when they own a business (e.g. farm, shop, etc.)			
The community disapproves when a married woman is a bread-winner			
In my community, men are blamed when they are not able to earn for the family			
The community disapproves of a woman who attends meetings (training, field visit)			
The community disapproves when men allow their wives to participate in project activities			
My community disapproves when men have a shared decision-making power with their wife over enterprises, income-generation activities, or resources important for family livelihood			

Statement	Blue= agree	Red= disagree	Don't Know
My community disapproves women who speak in public in a meeting or other social gathering about their rights and wellbeing			
When a woman works outside the house for money, the children suffer			
Women prefer to work at home			
In this community the man always eats first			
A husband deserves the best meal			
Men make most big decisions in my community			
My spouse has land registered in their name			
Women in my community can own land as well as men			
Women in my community can be leaders as well as men			
Women in my community have the same opportunities as men			
In my community, the men go to most of the meetings (E.g. social meetings, political meetings)			
In your opinion, a person is justified in hitting his or her wife or husband. E.g., doesn't look after children properly, refuses to have sex, argues, etc.			
In my community a person with disabilities should not be involved in any of economic and income generation activity.			
In my community, the right of people with disabilities to access the resources and the social services required for their well-being is not important			
In my community, it is fair that families or community members decide on behalf of persons with disabilities in relation to their personal affairs without consulting them			
In order to ensure access to the resources and services for persons with disabilities someone from outside the community must come and support the person with disabilities ³⁹			
Notes / results / observations:			

Facilitator Notes

If you have the time, allow a discussion to occur after each question as it can provide useful nuance around behavior norms. It also helps you to understand the type of community you are working with.

HOUSEHOLD SURVEYS ON DECISION-MAKING, PARTICIPATION AND WELL-BEING

Household surveys are one example of methods you can use to collect GESI-responsive quantitative data at the household and individual level. They collect information about characteristics, demographics, behaviors, needs, experiences and opinions of different groups of people. Surveys also provides statistically valid information about many people. Most surveys use close-ended questions but can also include open-ended questions to clarify responses to close-ended questions. GESI disaggregated data may be collected from the same households or individuals over a period of time to gain an insight of trends or changes over time.

For example, you can collect baseline, midline and end line data from the same households or individuals and compare results. Household surveys can be conducted **before** project implementation, and during project monitoring and evaluation.

Tables 16, 17 and 18 are examples of questions that you may incorporate in a household survey to collect GESI-responsive quantitative data.

Table 16 | Household Survey on Decision-making

Activity	In the past 12 months did you make decision to participate in the activity? 1 = Yes 2 = No	How much input did you have for the activity? 1 = No input 2 = Input in few decisions 3 = Input into some decisions 4 = Input into most or all decisions 5 = No decision made	Who made decisions on how to enjoy benefits/spend income generated from the activity: 1 = Self 2 = Jointly but I made most of the decisions 3 = Jointly but my spouse/partner made most of the decisions 4 = Other (specify)	To what extent do you feel you can make your own personal decisions regarding these activities free of coercion/control? 1 = Not at all 2 = Small extent 3 = Medium extent 4 = Large extent
Economic Activities				
Food crop farming				
Non-farm economic activities				
Cash crop farming				
Livestock rearing				
Self-earned cash activity ⁴⁰				
Skills and capacity training or workshops				
Selling agricultural crops				
Livelihoods activities during emergency				

40 This does not include the broader household income or cash earned by the spouse/partner or other household members.

Activity	In the past 12 months did you make decision to participate in the activity? 1 = Yes 2 = No	How much input did you have for the activity? 1 = No input 2 = Input in few decisions 3 = Input into some decisions 4 = Input into most or all decisions 5 = No decision made	Who made decisions on how to enjoy benefits/ spend income generated from the activity: 1 = Self 2 = Jointly but I made most of the decisions 3 = Jointly but my spouse/partner made most of the decisions 4=Other (specify)	To what extent do you feel you can make your own personal decisions regarding these activities free of coercion/control? 1 = Not at all 2 = Small extent 3 = Medium extent 4 = Large extent
Community Activities				
Local economic development committees				
Water user associations/ Water committee				
Local government council				
Social Activities				
Children going to school				
Sexual and reproductive health work in local health facilities				
Using health services				
Political Activities				
Vote for officer at all levels of government				
Run for office at all levels of government				

Table 17 | Household Survey on Participation

Do you participate in.....	Participation 1 = Never 2 = Sometimes 3 = Most of the time 4 = Always	If never, what could be the three major reasons?		
		Reason 1	Reason 2	Reason 3
1 WASH training?				
2 Collecting water?				
3 Regular sanitation and hygiene behaviors?				
4 Water user associations?				
5 Utilizing WASH technologies (hand-washing stations, water filters, sanitary latrines) in their household?				
6 Community WASH activities (developing a well for public use, working in community water distribution system, etc.)?				
7 Different farming activities?				
a land preparation				
b planting				
c weeding				
d storage				
e cultivation				
f processing				
g marketing				
8 Business group, savings or credit group or cooperative?				
9 In the market as a vendor, supplier, or wholesaler?				
10 Trainings to increase skills and knowledge for employment opportunities?				
11 Sexual and reproductive health work in local health facilities?				
12 Care of sick individuals?				
13 Attend training focused on gender-based violence?				
14 Children participating in school activities e.g. clubs, sports?				
15 Community level meetings or other collective groups?				
16 Awareness raising/training session regarding gender equality and social inclusion in the community?				
17 Speaking about gender equity, social inclusion, and other community issues at the local level?				
18 Key community leadership position?				

Table 18 | Household Survey on Well-being

Question	Response	
	1=Yes 2=No	If “no”, what is the main reason? ^a
Do you feel satisfied with the quality of drinking water source?		
Do you feel satisfied with division of time and labor spent collecting water for women?		
Do you feel less worried about providing necessities in your household?		
Do you feel confident in your ability to support yourself and your family?		
Do you feel satisfied with your livelihood activities?		
Did you experience physical or sexual violence in the past 12 months		
Do you know some place you can go for help in cases of physical or sexual violence		
Do you feel you are treated with respect and dignity by health service providers?		
Do you feel you receive adequate health services?		
Do you feel empowered (whatever it means to you)		
Do you feel confident, self-esteem, and self-efficacy		
Do you feel safe and secure in the household and community		
Do you feel satisfied with the quality of your child/ren's education?		
Do you feel you are treated with respect and dignity at health service providers?		

^a What is the main reason:

1=Ethnicity

2= Religion

3=Female

4= Person with a disability

5=Being poor

6=Lack of education

7=Being old

8=Water company/sellers are greedy

9=Corruption/misuse of power

10=Local community system is unfair

11=I don't know

99=Others(specify)_____

Step 4 | GESI-Responsive Data Analysis and Reporting

Refer to TOOL 4.3.



Section 3

GESI Integration in Program Design

This section provides a set of tools that can provide guidance on how to integrate GESI in program design. The section includes five tools:

TOOL 3.1 Proposal Development Guide

TOOL 3.2 GESI Integration in Program Design

TOOL 3.3 GESI Indicators

TOOL 3.4 GESI Integration Action plan

TOOL 3.5 GESI-Responsive Budgeting

TOOL 3.1 PROPOSAL DEVELOPMENT GUIDE

This tool is a checklist with key questions to consider in developing and/ or quality review of proposals that address gender equality and social inclusion from the outset of program design. This tool is intended to be used by program leaders and project managers, technical sector specialists and M&E specialists. The guiding questions represent a general, core list that can be consulted regardless of sectoral focus.⁴¹

Table 19 | GESI Proposal Quality Review Checklist

Checklist	1=Yes 2=No 3=Partially	Recommendations
I In the Program Description		
1.1 Does the situational analysis consider the different social, economic, cultural and political situations of men, women, boys, girls and other marginalized group as identified through GESI analysis?		
1.2 Does the situational analysis incorporate findings from the GESI analysis and reflect an awareness of the identified gender disparities and social discrimination?		
1.3 Does the problem statement define the gender gaps and social exclusion issues that the program intends to address?		
1.4 Are sex and age disaggregated data, and gender and disability statistics provided as background and/or justification for the intervention?		

41 Adapted from USAID (2013). How-to Note: Addressing Gender and Inclusiveness in Project Design.

Checklist	1=Yes 2=No 3=Partially	Recommendations
1.5 If not, has a reason (e.g., unavailability of such data, inappropriateness of disaggregation against an indicator) been given for the omission?		
1.6 Is the target beneficiary group considered excluded or marginalized and is this supported through the statistics/evidence presented?		
1.6 Does the risk analysis include a lack of capacity to reach and work with excluded groups and women, along with a mitigation strategy?		
1.8 Does the risk analysis include the potential for empowered groups (e.g. men) to actively resist the empowerment of marginalized groups (e.g. women), along with a mitigation strategy?		
2 In the Implementation Plan		
2.1 Does the implementation plan appropriately address the dimensions of gender inequality and social exclusion as described in the GESI analysis? If not, does it recommend how gaps can be filled?		
2.2 Do the proposed activities include specific action on gender and exclusion? Are they appropriate and sufficient to make sure inequality does not increase? Do they cover at least three of the five GESI domains?		
2.3 Do the activities include interventions to advance the empowerment of women and other vulnerable groups (e.g., formation of women's collectives, support to these groups, capacity-building for vulnerable groups gender training with men, creation of opportunities for women to participate in decision-making, increased access to resources, support for entry into non-traditional roles and spaces)?		
2.4 Do the activities include interventions to advance empowerment of marginalized people (e.g., targeting persons with different disabilities, support to these groups, capacity-building for these people, increased their access to services and resources, enhance their participation and decision-making in the project)?		
2.5 Is there a budget for capacity-building; working with men and women and other marginalized people and training project staff to reflect on, understand and champion GESI?		
2.6 Is the development of GESI knowledge products and practices included as a specific output, for example, a case study on the impact of gender norms on women's empowerment?		

Checklist	1=Yes 2=No 3=Partially	Recommendations
3 In the M&E Plan		
3.1 Does the M&E plan include addressing the gender and social inclusion data gaps in the project?		
3.2 Has collection of sex-, disability- and age- disaggregated (and on any other form of exclusion) data been specified in the baseline and all subsequent data gathering?		
3.3 Have participatory qualitative research methods that involve marginalized groups been included as part of the monitoring plan?		
3.4 Does the monitoring plan include collective moments of reflection and workshops on GESI?		
3.5 Are success and impact parameters and indicators appropriately gendered and inclusive?		
3.6 Does the monitoring framework include measurable gender and social inclusion indicators appropriate to the program and its activities?		
3.7 If only general indicators have been included, are there specific indicators that could be suggested to trace GESI issues?		
4 In the Budget		
4.1 Have adequate resources for the proposed GESI activities and M&E been provided for?		
4.2 Is there adequate funding for staff members to participate in GESI related capacity building, and to refresh the skills and capacities of staff who have had previous training?		
5 Additional		
5.1 Are detailed findings from the GESI analysis included in the proposal's annex?		

TOOL 3.2 GESI INTEGRATION IN PROGRAM DESIGN

PURPOSE

The following tool is intended to guide the program design process, which includes the development of various frameworks and plans. A GESI-sensitive program design serves to improve project-level outcomes, minimize risk of unintended consequences, and ensure that the unique needs and challenges of diverse individuals and groups are met through the program.

WHO SHOULD USE THIS TOOL?

The tool is meant for program design teams, but may also be used by team leaders, budget/finance officers, program managers, M&E experts and gender experts who may be contributing to the program design process.

HOW TO USE THIS TOOL

This tool is organized by the main types of program frameworks and plans which are commonly developed in the program design stage. Each section includes directions and questions to guide the design process.⁴² If the design team chooses to develop a log-frame, the sections in this tool can be used to inform each part of the log-frame. For example, the M&E plan should correspond with the indicators, results, and sources of verification listed in the log-frame.

This tool assists WV staff to take a deep dive into GESI matters under the five domains (access, decision-making, participation, equal opportunities, and well-being) as the program is designed. While WV may already have well-developed program design tools that provide for gender mainstreaming and integration, this tool goes beyond this onto the more comprehensive concept of GESI.

Before designing program frameworks and plans, it is imperative that a GESI analysis is conducted, and its findings are analyzed. Findings and insights from GESI analysis provide the foundation for GESI-responsive and transformative programs.

TIP!

Continually refer to the GESI analysis findings to stay grounded in the realities and experiences of the program's target population groups. It is important to always remember that you are designing for people.

If you are stuck on how to ensure if each plan, framework, or activity is GESI-responsive, refer to the sector-specific examples and references.

42 Some guiding questions have been adapted from USAID(2013). How-to Note: Addressing Gender and Inclusiveness in Project Design.

SUGGESTED PREPARATIONS

- Gather all the data collected during the GESI analysis (see TOOL 2.1), including the literature review, facilitator notes, participant feedback, and generated insights.
- Ensure that data represents diverse groups whose needs will be addressed in the program design.
- If any findings are particularly extreme or surprising, consult a GESI expert and invite them to program design/planning sessions.
- In addition, if there seem to be crucial gaps in the data collected (e.g. some relevant groups were not included in the GESI analysis) devise a plan for completing data collection by making sure that the project design team (including those carrying out the GESI analysis) consist of all the relevant groups such as men, women, boys, girls, including persons with disabilities and excluded groups.
- Make sure that data collection methods allow the voices and experiences of women, men, boys and girls including persons with disabilities and other vulnerable groups to be heard (e.g. time and location of interview/focus group discussions are convenient and safe for all, the use of inclusive communication modality such as having sign language translators).
- Make sure that the World Vision and partners have the capacity and commitment to design socially inclusive GESI-responsive projects. If not, plan for capacity strengthening and awareness on GESI responsive and transformative approaches.

GESI INTEGRATION IN PROGRAM PURPOSE, OBJECTIVES, AND OUTPUTS

The program purpose and objectives may not be explicitly oriented towards gender equality or social inclusion, but they should address the needs and challenges identified by individuals and groups in the GESI analysis. GESI should also be integrated into your Theory of Change as outlined in TOOL 1.1.

When developing these, make sure that the objectives reflect differences among different social groups (e.g. related to gender, age, disability etc.) identified during the analysis and consider the following criteria:

- The overall purpose of the program contributes to increasing or improving access, decision-making, participation, enhancing equal systems, and well-being of one or more marginalized groups.
- The desired outputs seek to ensure that equal opportunities are given to all social groups and will not create barriers or challenges to certain social groups (such as persons with a disabilities).
- The objectives and outputs seek to challenge identified gender, disability and other social norms that currently cause marginalization and exclusion. Program objectives and outputs should address at least three of the five domains.
- Outputs refer to anticipated GESI-related changes for specific social groups ensuring that the anticipated changes focus on women, men, girls, boys, persons with disabilities and other excluded groups.

Table 20 | An Example of GESI Integration in Program Purpose, Objectives, and Outputs

WASH Sector Example	
Program Purpose	Improved health among primary school students
Objective	Improve safe drinking water availability in schools
Output	Girls and boys, including those with disabilities, equitably access safe drinking water in schools
Related GESI domains	Access and well-being

GESI INTEGRATION IN ACTIVITIES PLAN

Activities make up the foundation of a program, as program staff and participants regularly engage in activities, such as trainings, workshops, and meetings. Not all activities will have an explicit GESI focus, but all activities should be designed to be accessible to marginalized groups. In addition, specific activities will be needed to enable the program to meet the specific needs of vulnerable groups. When GESI is a cross-cutting theme and the program doesn't have GESI-specific objectives or activities, the designer of each activity should consider how they can enhance GESI-related outputs and outcomes, for example, when organizing a savings group, they can consider if women's decision-making and access would be enhanced by including them in a group with their spouses to foster discussion around financial assets, or if initially women need to be separate from men until they have had time to build up their knowledge and skills. When working on early grade reading, consider how community-led reading camps can be adapted to support children with different disabilities and vulnerabilities.

When creating the activities that correspond to program outputs, consider the following criteria:

- Activities that strengthen the capacity and enhance the awareness of World Vision staff and partners on their own GESI-related norms and attitudes and ways to implement GESI-responsive and transformative approaches.
- Activities include trainings to increase the knowledge, skills, and capacities (human capital) of marginalized groups that improve their access to information and enhance their participation in and benefit from the project. All general training should be accessible although some training may target the initial needs of specific groups first. For example, women may receive an initial training on local government and budgeting processes prior to engaging in a community meeting that talks about local government expenditure for the coming year. It is important to engage in remediation to address barriers to participation.
- Activities encourage increased access to resources and services, active leadership, inclusivity, participation and decision-making by diverse community members (activities are not always led or dominated by WV staff).
- Activities avoid potential barriers to participation, such as long-distance travel to activity location, inaccessible environments and services, language skills, childcare, available time, education level, and individual freedom and mobility
- Some activities target specific marginalized groups in order to more effectively address their special needs.
- Activities address gender, disability and other constraints and opportunities so that women, men, boys, girls, persons with disabilities and excluded groups participate, access and benefit equitably from the project.

Table 21 | An Example of GESI Integration in Activities Plan

Economic Empowerment Sector		Related GESI Domains
Activity 1	WV facilitator organizes women into business and savings groups	Participation Access
Activity 2	Group members appoint their own leaders and decide group accountability mechanisms that enable them to take part in decisions about their own affairs and statutes	Decision-making Well-being
Activity 3	WV facilitator trains women in budgeting, accounting, and saving skills	Access Participation
Activity 4	Group leaders facilitate business planning session	Participation

GESI INTEGRATION IN RISK MITIGATION STRATEGY

Unfortunately, even the most well-intentioned programs can cause risks or unintended negative consequences on both program staff and participants. In order to avoid harmful risks and consequences as much as possible for specific social groups and to promote equality in access, participation, leadership and decision-making among social groups in project or program as feasible and appropriate, it is important to develop a mitigation strategy that pays special attention to the risks and consequences that marginalized individuals may experience most acutely. While some risks may have already been identified during the GESI analysis, it is also good practice to brainstorm additional unintended consequences during the program design phase to mitigate the potential risks on gender and social inclusion specific risks, as they may arise during discussions about activities. Consider whether program activities may cause any of the following issues outlined in figure 5.

Figure 5 | Negative consequences that may be caused by program activities

HARM	TIME POVERTY	CONFLICT INSENSITIVITY
<p>Increased discrimination or stigmatization of a social group</p> <p>Continuation, increase or creation of harmful practices, such as GBV</p> <p>Program staff and/or beneficiaries are treated with disrespect or are discriminated against</p> <p>Program staff and/or beneficiaries are exposed to dangerous and/or inaccessible situations or spaces</p> <p>Participation has a financial cost</p>	<ul style="list-style-type: none"> Increased, time, labor or workload on a particular individual or group Inability for some to participate due to time poverty issues, such as child care, inappropriate time for meetings for women. 	<ul style="list-style-type: none"> Inputs, services or resources provided create family division or community tension Inputs, services or resources provided are used for harmful unintended purposes Inputs, services or resources provided are used by people they are not intended for

After identifying potential risks and unintended consequences, create additional mechanisms which can be utilized to mitigate their arise and impact in the program. See the table below for example consequences and mitigation strategies. If the strategy requires additional resources and activities, add these into the activity plans and budgets.

Table 22 | An Example of Integrating GESI in Risk Mitigation Strategy

Humanitarian & Emergency Assistance Sector Example		
Unintended Negative Consequence	Mitigation Strategy	Related GESI Domains
Women experience backlash from partners when receiving additional assistance	Hold meetings with both men and women to transparently discuss program purpose and intended benefits for target groups	Systems Participation
Food rations are acquired by unintended recipients	Monitor food supplies handled by each staff and market actor through transparent accountability system	Access
Beneficiaries with disabilities receive assistance that does not consider their specific situation	Organize preliminary needs assessment on the special needs.	Access
Beneficiaries do not have decision-making power over the resources and services they got from humanitarian responses	Critically assess the decision-making capacity of the target individuals/groups (such as children) and make sure that the target group receives the supports	Decision-making
Humanitarian assistance and support provided to only some beneficiaries	Provide equitable and safe access to humanitarian resources and services to meet the needs of all affected women, men, girls, boys and persons with disabilities	Systems Access Well-being

GESI INTEGRATION IN MONITORING AND EVALUATION PLAN

The Monitoring and Evaluation (M&E) plan should incorporate GESI-responsive data collection methods, indicators, and expected results. When choosing data collection and analysis methods to incorporate in the M&E plan (refer to tools on section two and four) and ensure all staff members that will be engaged in data collection review these guidelines. When choosing the indicators for the program, refer to TOOL 3.3. The following are examples of checklists that you need to consider in order to ensure that each component of the M&E plan is GESI-responsive.

Table 23 | GESI Integration in M&E Plan

A Checklist for GESI Integration in M&E Plan	
1 Data Collection Plan	
1.1	Data will be disaggregated by sex, age, disability status and other factors
1.2	Gaps in GESI data are addressed and included. For example, if religious affiliation has been identified as a basis for discrimination during the GESI analysis, choose to collect and disaggregate religious affiliation data
1.3	Data collection methods are both quantitative and qualitative, and utilize more than one or two methods
1.4	Are data collection methods participatory and appropriately engage different social groups. For example, data collection with children is aimed at their level of understanding, and encourages active sharing and movement
1.5	Data collection planned to be carried out by facilitators and enumerators who have participated in WV GESI training
1.6	Data collection methods are planned to measure equal participation of male and female including persons with disabilities and other excluded groups and measure the effectiveness and ultimate impact of the projects for men, women, girls and boys, including to persons with disabilities and other excluded groups
1.7	Data collection plan allow for measuring changes and trends in gender and social relations over time
2 Indicators and Data Analysis Plan	
2.1	Cross-cutting and sector-specific GESI indicators are selected according to the program's purpose and objectives
2.2	Selected indicators pertain to at least three of World Vision's five GESI domains. - access, decision-making, participation, systems, and wellbeing
2.3	Selected indicators are both quantitative and qualitative in nature
2.4	Data analysis matrixes compare responses from men, women, girls and boys, including from person with and without disabilities and other excluded groups
2.5	Data analysis and interpretation identify priority of GESI issues for different social groups and relative vulnerabilities of men, women, girls and boys, including persons with disability and other excluded groups
3 Monitoring and Evaluation Plan	
3.1	Are the GESI indicators identified and incorporated in the M&E system during program design and planning?
3.2	Will the GESI indicators incorporated in the M&E system help to measure GESI results, such as the participation levels of women, men and/or persons with disabilities in program implementation?
3.3	Does the M&E system enable collection of data that tracks differences in the benefits of the program for women, men, and other marginalized groups
3.4	Is the M&E system designed to collect GESI disaggregated data?
3.5	Does the M&E system allow for making comparison over time?
3.6	Does the GESI M&E System enable collection of data that show whether program objectives, outcomes, and impacts have been achieved for women, men, and other marginalized groups?
3.7	Does the M&E system help to assess and measure changes and trends in decision-making, participation, access, systems and well-being? (and the dynamics between marginalized and non-marginalized groups) over time, and the causes of those changes?

3.8	Will the M&E system allow collection of information on variables that can inform whether program and project objectives have been achieved for women, men, girls, boys, and other marginalized groups?
3.9	Will the M&E system allow collection of information on variables that can trace/track whether there are any significant differences in the benefits for women and men, boys, and girls and other marginalized groups?
3.10	The proposed evaluation includes several evaluation questions pertaining to how the program addresses gaps in gender equality and social inclusion, with explicit focus on WV's GESI domains
3.11	The proposed evaluation plans to equitably represent vulnerable social groups throughout the evaluation process and share and document experiences with gender and disability inclusion such as lessons learned and success stories

TOOL 3.3 GESI INDICATORS

This tool includes a suite of illustrative GESI indicators which are intended to measure program driven change. Developing GESI monitoring and evaluation indicators can strengthen the monitoring and evaluation system and enable the collection and analysis of data disaggregated by sex, disability status and other social attributes. Using an array of quantitative and qualitative indicators allows program teams to assess and monitor how the program is addressing the needs and challenges of diverse marginalized groups and contributing to increased gender equality and social inclusion.

OBJECTIVES FOR GESI INDICATORS

- Guide M&E team members in the measurement of progress towards GESI-responsive programming and project outcomes.
- Help generate evidence of impact with an accurate, in-depth picture of how marginalized groups are perceiving and experiencing World Vision's programs.

CONSIDERATIONS FOR SELECTION OF GESI INDICATORS

There are two major ways to differentiate GESI indicators: GESI-related indicators and GESI-targeted indicators.

GESI-related Indicators

Indicators that disaggregate data on a program result by GESI characteristics such as sex or disability status. Disaggregating an indicator by sex means that the data is broken down for women and men and disability status. For example:

- Number of children who access child friendly spaces, by sex and disability status
- Percentage of children in grade 3 achieving at least a minimum proficiency level in reading, by sex and disability status.

GESI-targeted indicators

Indicators that capture data on program results for a specific GESI group or characteristic. These indicators often reflect the GESI inequalities among women, men, and persons with disabilities and other vulnerable groups. They also reflect on what is needed to close the GESI gaps and can help to track changes in GESI-responsive program implementation and enrich understanding of the unique issues that affect a specific social group. Examples of GESI-targeted indicators include:

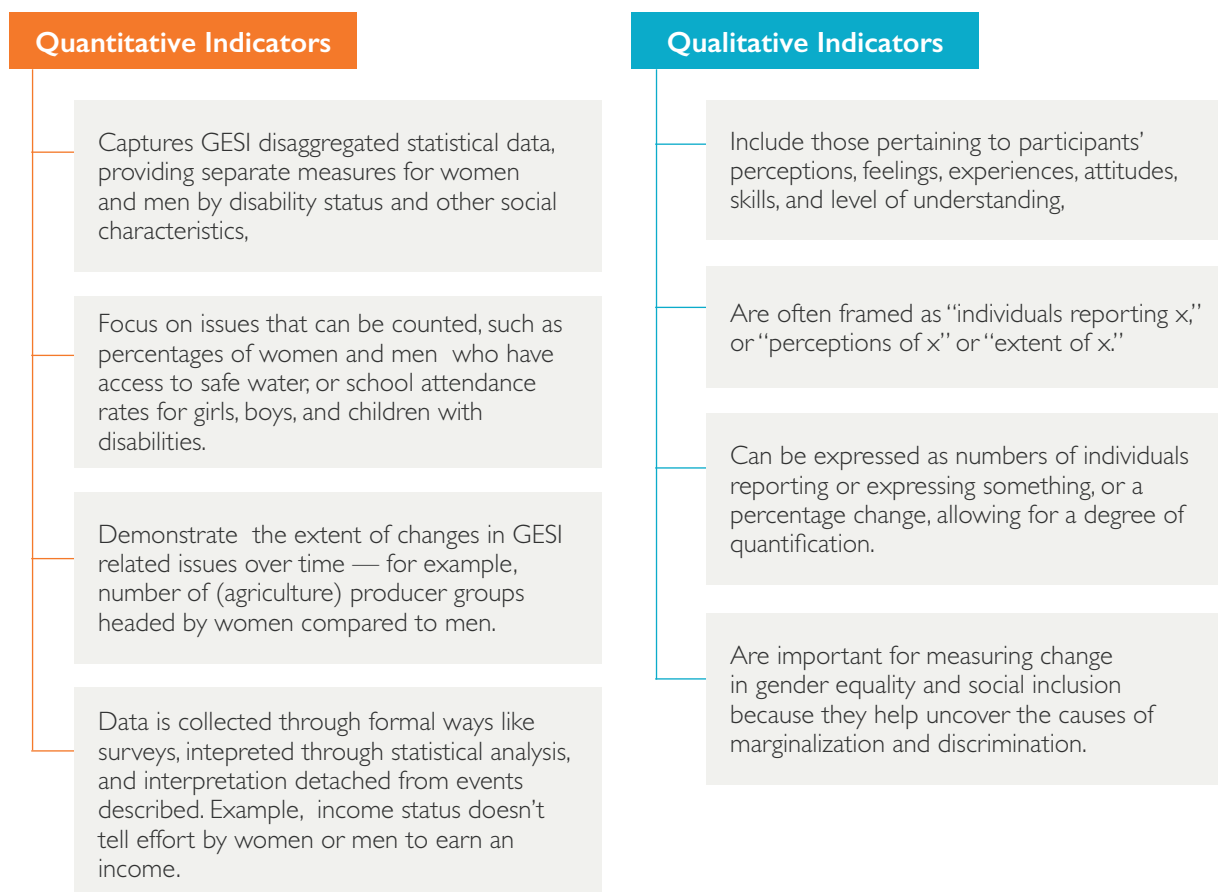
- Percentage of participants in programs designed to increase access to productive economic resources (assets, credit, income or employment) who are women, men and persons with disabilities.
- Percentage of men and women in union and earning cash who make decisions jointly with spouse/partner about the use of self-earned cash.

Program teams should select either or both categories of GESI indicators depending on their program's theory of change, objectives for data collection, scale of intervention and how data will be used to promote GESI.

Quantitative and Qualitative Indicators

GESI indicators can be quantitative and qualitative indicators. Select a variety of both quantitative and qualitative indicators in order to ensure you will capture a holistic and comprehensive understanding of how gender and social norms and practices are changing.

Figure 6 | Important considerations in choosing indicators



DISAGGREGATION OF GESI INDICATORS

Indicators that refer to “individuals” or “children”, should always be disaggregated by different categories. If the indicator is referring to joint decision-making in the household, then it may be appropriate to disaggregate the data by sex, age, and socio-economic status. For other indicators, it may be appropriate to disaggregate the results according to different or additional social characteristics and groups (e.g. “children” can be disaggregated into “boys, girls and children with disabilities”). The level and type of disaggregation depends on the purpose of the indicator.

SECTOR VS NON-SECTOR SPECIFIC GESI INDICATORS

For many GESI indicators, it is possible to associate them with a specific sector like health, WASH, education or livelihoods. For example, an indicator like *“percentage of children 12-18 years who experienced physical or sexual violence in the past 12 months, by sex”* is commonly measured by programs in the Child Protection Sector. Yet given the integrated nature of many programs, program teams should also consider selecting cross-cutting indicators to enrich their GESI program data. Such indicators such as, *“percentage of women, men and persons with disabilities reporting they participate in community level meetings or other collective groups”* can be measured by any program irrespective of their programming sector bias.

Other Considerations

- Ensure the capacity of partners and implementers to collect and analyze the disaggregated data.
- Ensure indicators are easily understood by data collectors and M&E team members (such by providing definitions for each indicator) and are translated in a way that doesn't use words with negative associations such as 'disabled.'
- Check whether indicators might impose new reporting burdens on partners and if they are aligned with existing reporting obligations.
- Ensure that both quantitative and qualitative methods will be used to collect information on each of the selected indicators.
- Make sure that GESI analysis findings and recommendations have been used to help select the most appropriate and relevant GESI indicators to measure.
- That each of the indicators is important for informing program management.

ILLUSTRATIVE GESI INDICATORS BY PROGRAM SECTOR

The table below present illustrative GESI indicators adapted from M&E frameworks of World Vision as well as various organizations. These indicators have been aligned to World Vision's GESI TOC domains, programming sector and results level. Additional list of illustrative GESI indicators are included in Annex 4. M&E specialists and other program staff should use these lists to select the GESI indicators most relevant to their program. The indicators are mostly measurements of outcome-level results, as output and input level results will depend on the program's specific activities and should therefore be added.

Table 24 | World Vision GESI indicators by program sector, GESI domain, and result level

Sector	Indicators	GESI Domain	Results Level
Child Protection and Education	Proportion of children in grade 3 achieving at least a minimum proficiency level in reading, by sex, disability status	Access	Outcome
Child Protection and Education	Percentage of children 12-18 years who experienced physical or sexual violence in the past 12 months, by sex	Well-being	Outcome
Child Protection and Education	Percentage of female and male adolescents aged 12-18 years who know some place they can go for help in cases of physical or sexual violence	Well-being	Outcome
Child Protection and Education	Percentage of participants reporting increased agreement with the concept that males and females should have equal access to social, economic, and political resources and opportunities, by sex	Systems	Outcome
Child Protection and Education	Coverage of essential vaccines among children, by sex, and age	Access	Outcome
Child Protection and Education	Percentage of children who access important school materials—uniforms, books, electricity for homework completion, by sex, disability status	Access	Output
Food Security and Livelihoods	Percentage of participants in programs designed to increase access to productive economic resources (assets, credit, income or employment) who are female.	Access	Outcome
Food Security and Livelihoods	Percentage of men and women in union and earning cash who make decisions jointly with spouse/partner about the use of self-earned cash	Decision-making	Outcome
Food Security and Livelihoods	Percent of respondents who think men and women should share household tasks, such as cleaning, cooking and taking care of children, by sex	Participation	Outcome
Food Security and Livelihoods	Number of men, women and persons with disabilities accessing information and training from agricultural extension agents or farming centers/schools	Access / Systems	Output
Health	Proportion of women with access to maternal health services within one hour's walk	Access	Outcome
Health	Number of hours spent taking care of sick individuals by men and women	Participation	Outcome
Health	Evidence that legal or regulatory barriers preventing women from accessing reproductive health services have been removed	Systems	Outcome

Sector	Indicators	GESI Domain	Results Level
Health	Extent to which males, females and persons with disabilities feel they are treated with respect and dignity at health service providers	Well-being	Outcome
Health	Percent of children aged 0-23 months who were born at least 33 months after the previous surviving child, by sex	Well-being	Outcome
Humanitarian Emergency/ Protection	Number of children who access child friendly spaces, by sex, disability status	Access Systems	Output
Humanitarian Emergency Affairs	Evidence that food distribution is organized to reduce waiting and travel time, and safety risks for women, children, the elderly, and persons with disabilities	Access	Outcome
Humanitarian Emergency Affairs	Evidence that males, females and persons with disabilities have access to water and sanitation sites which are culturally appropriate, well lit, and in safe locations	Access	Outcome
Humanitarian Emergency Affairs	Number and percentage of males, females and persons with disabilities accessing cash grants or credits for establishing livelihoods	Access	Output
Water, Sanitation and Hygiene	Number and percentage of boys and girls practicing in hygiene and sanitation practices at school and home	Access	Output
Water, Sanitation and Hygiene	Percentage of males, females and persons with disabilities participating in water user associations	Participation	Outcome
Water, Sanitation and Hygiene	Men and women's level of satisfaction with division of time and labor spent collecting water for women	Well-being	Outcome

TOOL 3.4 GESI INTEGRATION ACTION PLAN

A GESI Integration Action Plan (GESI-IAP)⁴³ tool is a project's road map for incorporating gender equality and social inclusion perspective throughout the project cycle. The tool can assist project teams to ensure all members of the target population share the benefits and opportunities of the project, regardless of their social and economic characteristics (gender, age, disability status, income, and others) by mapping integration of social inclusion considerations into project design and throughout the project cycle.

OBJECTIVES OF A GESI ACTION PLAN

A GES-IAP should be an integral part of project design, building on the findings and recommendations from a GESI analysis and/or other GESI-responsive assessments.⁴⁴ It can also be developed at a later stage, if necessary. It is advisable to integrate the GESI actions into the Project's Detailed Implementation Plan. The main objectives include to:

⁴³ Adapted from WorldVision Australia Gender Mainstreaming Action Plan (GAP).

⁴⁴ ADB (2009). Project Gender Action Plans: Lessons for Achieving Gender Equality and Poverty Reduction Results.

- Ensure the project is responsive to the different needs, priorities, interests and capacities of different social groups (women, men, girls, boys, and persons with disabilities) in the target population and addresses gender and social inclusion related imbalances and disadvantages.
- Outline specific GESI strategies and actions that will be taken within the project to ensure that men and women, boys, girls and persons with disabilities can equitably participate in, and tangibly benefit from, the project's interventions.
- Consolidate specific GESI related actions and strategies into a single document to serve as a GESI mainstreaming road map for the project team.
- Ensure 'Do No Harm' risk mitigation actions will be adopted to avoid any potential negative consequences of the project on different vulnerable social groups (women, girls, persons with disability, and persons with low economic status) including risks to their status, social relations in the households, and workloads.
- Ensure the findings and recommendations from a GESI analysis are utilized and applied to project design and implementation.
- Hold the project team and partners accountable for mainstreaming GESI and implementing GESI-related interventions across the project cycle.

WHEN SHOULD IT BE DONE?

A GESI-IAP should be an integral part of project design, building on the findings and recommendations from a GESI analysis and/or other GESI-responsive assessments.⁴⁵ It can also be developed at a later stage, if necessary. It is advisable to integrate the GESI actions into the Project's Detailed Implementation Plan. Details can be held in a GESIAP with broad gender and social inclusion action language added to the DME.

WHO SHOULD USE THIS TOOL?

The tool is meant for all project team members, but specifically important for project managers and gender and social inclusion advisors.

KEY CONSIDERATIONS⁴⁶

- **Undertake a quality GESI analysis:** Use the findings from the GESI analysis to develop a GESI-IAP. Project team and partners need to review the findings and recommendations of the GESI analysis collaboratively. As part of this participatory process, develop GESI actions and strategies to be housed in the GESI-IAP so it is collectively owned and understood by the project team.
- **Identify priority GESI issues and rationale for actions:** Briefly note priority GESI issues identified in the GESI analysis or other GESI-responsive assessments where available, and/or project reporting and evaluations, and clear rationale for the GESI actions. E.g. for a nutrition project, prevalence and acceptance of men eating first (to be followed by GESI action/s to manage this practice). In a livelihoods project, note if decision-making about spending is reported to result in violence between partners, and then articulate action/s to mitigate this risk.

⁴⁵ Adapted from World Vision Australia Gender Mainstreaming Action Plan (GAP).

⁴⁶ ADB (2013b). Preparing a Project's Gender Action Plan.

- **Goals, outcomes and outputs:** Identify clear, realistic goals linked to GESI outcome and outputs that relate to the addressing the GESI gaps and issues identified in the GESI analysis.
- **GESI Actions:** Identify GESI actions necessary for reaching the goals, outcomes and outputs. GESI actions will depend on the project, issues identified, available resources etc. Ensure GESI actions are guided and supported by dedicated, budgeted GESI technical support team (whether internal or external, or both). Provide adequate resources necessary for effective implementation of GESI activities. Ensure long-term GESI technical support is available in the project team to help guide, support, monitor and evaluate GESI-IAP implementation. Include, wherever possible, two members of the same household (ideally spouses) in technical training and other capacity building events conducted by the project. Sample actions might include:
 - Project staff ensure training and other capacity-building scheduled activities are considering women's workload and activity schedule, including childcare responsibilities and the needs of persons with disabilities.
 - Project to organize staff for project training sessions; fund travel for them to enable women with young children and persons with disabilities to attend relevant project meetings and trainings.
 - Provide incentives that will encourage participation of excluded groups in project activities such as offering services/benefits that respond to their interest and needs.
- **Project Activities:** As part of the development of the GESI-IAP, it is useful to list all project activities or a selected number of them from the project design that require a GESI action to support them. Once the GESI-IAP is complete, the project team can decide if they want to delete the column, adjust the GESI-IAP table accordingly, or keep the project activities as the first column.
- **Use GESI indicators and targets:** Include GESI indicators at outcome and/or in majority of outputs in M&E frameworks from the project log frame, if helpful. Otherwise feel free to remove this column. Some project teams may consider developing additional GESI indicators and targets for their identified GESI-IAP actions, however, these will remain separate from the log frame.
- **Responsibilities:** Specify responsibilities for delivering GESI actions. List project/partner staff responsible for each actions and note any support required or needed from other parts of the National office (NO), Regional Office, Global Center (GC), etc.
- **Timeframe:** Identify the time frame(year/s) when actions will be implemented.



TIP!

Integrate GESI messaging and content into all project training materials, capacity building events and awareness raising events implemented with partners and communities so that gender equality and social inclusion messages are being delivered to participants regularly and from a range of different sources.

Ensure gender actions are guided and supported by dedicated, budgeted gender and technical advisory support (whether internal or external, or both).

Table 25 | GESI Integration Action Plan GESI-IAP

Project Activities	Priority GESI Issues Identified, Rationale for GESI Actions	GESI Actions	GESI Indicators and Targets	Responsibility	Time frame
What?	Why?	How?	Which?	Who?	When?
Goal:					
Outcome #:					
Output #:					
Outcome #:					
Output #:					
Outcome #:					
Output #:					

TOOL 3.5 GESI-RESPONSIVE BUDGETING

GESI-responsive budgeting is a tool that aims at integrating GESI perspectives in the budgeting processes that has been found to be one of effective approaches for achieving GESI outcomes. Applying a GESI lens to budgets helps to ensure that the budget, revenues and expenditures consider the different needs of everyone (women and men, girls, boys, persons with disabilities and other social groups). This involves analyzing how the budgets will affect different social groups at all stages of budget process. It also involves transforming these budgets to ensure that gender equality and social inclusion commitments are implemented and realized.⁴⁷

The failure to allocate human and financial resources to GESI activities can reduce the efficiency and effectiveness of the programs.⁴⁸ In order for GESI to be properly reflected in budget decisions, it is important to first carry out a GESI analysis to understand the needs of various social groups.⁴⁹ If women or other marginalized groups are not visible and their needs not planned for during early program or design phases or policy cycles, it is harder to 'retro-fit' resources and budget lines. This tool helps you score how effectively you have allocated appropriate financial and human resources for the promotion of GESI.

47 Oxfam (2018). A Guide to Gender-Responsive Budgeting.

48 Sharp and Elson (2012). Improving Budgets.

49 Oxfam (2018). A Guide to Gender-Responsive Budgeting.

OBJECTIVES OF GESI-RESPONSIVE BUDGETING

- Helps to ensure that budget allocations are fair, equitable and inclusive of all project participants.
- Support staff in better estimating the costs and resources needed to address the different priorities, needs, constraints, opportunities, for marginalized and vulnerable groups including children, women, men, persons with disabilities and other vulnerable groups.
- Allocates funds to ensure the implementation of program plans include GESI impact or results.
- Enhances the quality of programs and services for vulnerable population.

Consider the following criteria when allocating/preparing a budget during program design to ensure the desired GESI plan will be implemented:

- Budget is allocated for activities related to enhancing the capacity of programs in implementing GESI-responsive programs.
- Budget is allocated for accessibility inclusion and reasonable accommodations to provide support and assistive technologies to persons with disabilities and enhance their ability to participate in and benefit from the project.
- Budget is allocated to accommodate gender equality in terms of number of men and women staff members, particularly at field level.

DEVELOPING A GESI-RESPONSIVE BUDGET

When reviewing a GESI-responsive project proposal, answer the questions on Table 24. Put five-point score in the right column. After all questions are answered, add the number to get a total score. Put the total score at the bottom of the table. The maximum possible score is 50. If the score is less than 45, there is a need to re-examine the budget to ensure it is GESI-responsive.

Table 26 | Developing a GESI-Responsive Budget

Questions	SCORE 1=None 2=Poor 3=Fair 4=Good 5=Excellent
Is there a budget item for conducting a GESI analysis/assessment, or has one already been conducted and the findings from it used to develop this budget?	
Are GESI-focused activities given a specific budget allocation?	
Is the development of GESI knowledge products (e.g. factsheets, translated documents, large print for those with visual impairment, lessons learnt summary, best practice guide and alternative modes of communication) included in the budget?	
Is there an explicit budget allocation for staff GESI capacity-building?	
Does the project plan to recruit a person from a marginalized social group (e.g. person with disabilities) and are there resources allocated?	
Is there a commitment in the proposal and program design to ensure that neither men nor women should make up more than 60% of project staff?	

Questions	SCORE 1=None 2=Poor 3=Fair 4=Good 5=Excellent
Is there a budget for GESI technical support to the project (i.e. a Project GESI Position, short-term GESI consultant or % time for a GESI Advisor at Support/National/Regional Office)?	
Are there resources allocated for an inclusion fund to meet the additional costs for program participants who require childcare, transport assistance, caregiver support, sign language interpretation or other expenses necessary for their participation	
Are there activities that have been budgeted that address the specific needs of individual groups – literacy instruction, provision of assistive devices etc.	
Does the budget include activities to address identified potential GESI risks and unintended GESI consequences to project participants or staff?	
TOTAL SCORE OUT OF 50	

GESI INTEGRATION IN STAFFING/TEAM MANAGEMENT PLAN

When designing a GESI-responsive program, it is important to ensure that the program staff members are budgeted for, hired/assigned responsibilities and qualified to implement the desired plan with a GESI lens. Program leaders should review the program outputs and activities and select appropriate staff members.

Consider the following criteria when creating your program team:

- Staff members have previously worked with specific marginalized groups and are familiar with their unique needs and challenges.
- Staff members have the capacity and commitment to design socially inclusive projects (GESI-responsive). If not, make sure that there is a plan to strengthen the capacity of staff.
- Staff members at all levels include both women and men especially for field-based World Vision and partner staff.
- Staff members are representative of the program target groups, to the greatest extent possible, which may contribute to WV's rapport in communities.
- Staff members have participated in at least one WV GESI training, or served as GESI Focal Points.
- Staff members can communicate with program target groups in their preferred language as well as via alternative means of communication (e.g. sign language, braille).



Section 4

GESI Integration in Program Implementation, Monitoring and Evaluation

This section provides guidance on how to integrate GESI in program implementation, monitoring and evaluation. The section includes three tools:

TOOL 4.1 GESI Integration in Program Monitoring

TOOL 4.2 GESI-Responsive Program Evaluation

TOOL 4.3 Analyzing and Reporting GESI-Responsive Data

Integration GESI in program implementation, monitoring and evaluation is the key to understanding whether the project's planned activities are achieving gender equality and social inclusions goals by addressing the different needs and priorities of women, men, girls, boys, persons with disabilities and other vulnerable groups.⁵⁰ It helps to assess the impact of the program on different social groups, and to determine gaps in terms of GESI aspects that needs to be integrated into monitoring and evaluation systems. Effective GESI-responsive M&E needs to include both qualitative and quantitative disaggregated data by sex, age, disability status and other social characteristics to measure the impact of a program on different social groups.

OBJECTIVES FOR INTEGRATING GESI IN MONITORING AND EVALUATION

- To support World Vision staff in incorporating GESI in monitoring and evaluation processes.
- To ensure that the program has addressed the different needs of women, men, persons with disabilities, children and other vulnerable groups.
- To ensure that the program provide a positive impact on access, decision making, participation, well-being and systems for vulnerable population.
- To improve program implementation and effectiveness. It also allows for inclusion of corrective measures after midterm evaluation.⁵¹
- To promote learning for more effective and transformative future GESI projects.⁵²

50 FAO (2014). Gender-Sensitive Monitoring and Evaluation for FNS.

51 The World Bank (2001). Integrating a Gender Dimension into Monitoring & Evaluation.

52 The World Bank (2001). Integrating a Gender Dimension into Monitoring & Evaluation.

TOOL 4.1 GESI INTEGRATION IN PROGRAM MONITORING

GESI integration in program monitoring is an ongoing activity of assessing the processes and activities of program implementation and how program affect women, men, girls, boys, persons with disabilities and other vulnerable groups. Monitoring also provide information on the progress towards achieving gender equality and social inclusion goals (performance monitoring). This is done through a regular and systematic data collection, analysis and documentation and reporting.

OBJECTIVES OF PROGRAM MONITORING IS TO:⁵³

- assess and track progress of planned program implementation activities.
- learn about potential successes and what is working well, what needs improvement, and what is not working to inform management decisions.
- identify project trends and patterns and ensuring that project activities are on schedule.
- identify any needs, challenges and problems and take timely corrective measures.
- ensure accountability of performance and project resources to donors and participants.
- provide the basis for evaluation and learning.

STEP BY STEP GUIDANCE

Conduct a GESI analysis to establish baseline. The baseline should be established at the beginning of the program and should contain GESI aggregated data. The GESI analysis will provides information on GESI specific potentials, challenges and risks and how the project can help to promote GESI. This will provide a basis for assessing the results and impact of the program. It will also help in determining whether change is happening or not, and how much of an impact the program have towards achieving GESI goals.

USE GESI-RESPONSIVE INDICATORS

The indicators should measure access, participation, decision-making, well-being and systems. GESI-responsive indicators will help you determine whether there is progress towards achieving gender equality and social inclusion or not.

DEVELOP A GESI MONITORING PLAN

The monitoring plan should specify the following:⁵⁴

- The person responsible for program monitoring. At least one person in the monitoring team should have sufficient GESI knowledge and competence.
- If the project partners been trained or at least sensitized on GESI issues.
- Data collection methods e.g. surveys, secondary data, focus group discussions, etc.
- How the data will be analyzed.
- How often various data will be collected to track indicators.
- Where the monitoring will take place.
- How data will be reported and shared.

53 WHO (2006). Communicable Disease Surveillance and Response Systems; UNICEF (2003). Programme Policy and Procedures.

54 GIZ (2014). Guidelines on Designing a Gender Sensitive Results-Based Monitoring System.

MONITORING VISIT

Monitoring field visits are a key in ensuring that project activities are implemented the way they are described in the plan. These visits usually involve meeting with the people running the project, or program participants.⁵⁵ Field visits can provide information that may not be captured in written reports or phone meetings. The face to face observation during field visits provides a better understanding of the project setting, activities, processes, results, and participation.⁵⁶ Monitoring should be inclusive and participatory to ensure the needs of vulnerable groups are captured and addressed. During the monitoring visit, collect GESI information that includes:⁵⁷ progress towards GESI transformative goals and objectives; whether budget and resources are GESI-responsive; challenges and opportunities for improvements; and any support needed.

DATA COLLECTION

GESI issues are closely related to cultural values, social attitudes and perceptions. Therefore, it is recommended to use GESI-responsive indicators that can collect both quantitative and qualitative information related to GESI domains. Data must be disaggregated by sex, age, disability status and other social characteristics. The teams responsible for data collection should be GESI equitable and ethnically or religiously diverse. They also need to have appropriate language skills.⁵⁸ This will help minimize bias and effects of related cultural attitudes related to GESI.⁵⁹

CONDUCT DATA ANALYSIS

Ensure that the team responsible for data analysis have GESI competence. Data analysis should focus on the current status of indicators and emphasize on project inputs and outputs as well as tracking GESI outcomes and impacts.⁶⁰ Determine how the program affect men, women, boys, girls, persons with disabilities and other vulnerable groups. Also identify progress on the achievements of GESI outcomes.

Prepare progress reports: After data have been analyzed, prepare progress reports. These reports can be shared with program stakeholders. In the reports, make sure to disaggregate information by sex, age, disability status. Discuss progress reports with field staff implementing the activities, participants, and other stakeholders and seek their suggestions on how to improve program implementation. Progress reports need to have the following information:⁶¹

- How the program affects women, men, persons with disabilities and other vulnerable groups;
- Any unanticipated consequences of the program;
- How the program is performing in terms of promoting GESI and transforming lives and
- Recommendations for needed actions that will strengthen program implementations and ensure GESI goals are achieved.

Make necessary adjustments: Decide if there are any adjustments that need to be made in order to achieve program objectives, especially activities or processes that are not cost effective or efficient, are not working, do not promote GESI, are not contributing towards meeting program goals, and are causing unintended harms to participants. Strengthen processes and activities that are making slow progress.⁶²

55 WFP(Undated). Gender and Monitoring.

56 UNICEF (1990). Guide for Monitoring and Evaluation.

57 WFP(Undated). Gender and Monitoring.

58 USAID (2014a). Toolkit for Monitoring and Evaluating Gender-Based Violence Interventions.

59 Brambilla (2001). Gender and Monitoring: A Review of Practical Experiences.

60 The World Bank (2005). Gender Issues in Monitoring and Evaluation.

61 WFP(Undated). Gender and Monitoring.

62 WFP(Undated). Gender and Monitoring.

TOOL 4.2 GESI-RESPONSIVE PROGRAM EVALUATION

GESI-responsive evaluation is crucial in enhancing gender equality and social inclusion in our programming. It assesses the relevance, performance, efficiency, and impact (both intended and unintended) of the project on women, men persons with disabilities and other vulnerable groups.⁶³ The evaluation integrates GESI domains into approaches, methods, and processes. Program evaluation can be conducted during baseline, mid-term, at the end of the program or long after the program has ended.⁶⁴

OBJECTIVES⁶⁵

- To measure the impact of a program both intended and unintended on women, men, persons with disabilities and other vulnerable groups.
- To identify elements in the programs that work well in addressing gender equality and social inclusion issues. GESI program evaluation use data to determine progress and impact of the program implementation on various social groups.
- To identify gaps and promising practices in program design, implementation, and resource allocation. This information is helpful in making future decisions that will enhance GESI positive outcomes.
- To provide information and new knowledge on what works, what doesn't work, and how to address various challenges in implementing GESI programming.
- To ensure accountability to stakeholders about processes and the impact of the program.

PROGRAM EVALUATION ASKS THE FOLLOWING QUESTIONS⁶⁶

- Did the program use the right activities for women, men, persons with disabilities and other vulnerable groups? Were the activities done right?
- Is the program working? Did it cause a change?
- What are the effects of the program activities on women, men, persons with disabilities and other vulnerable groups?
- What explains the observed results? Are the results you observe a consequence of the program?
- Is there something else besides the program that contributed to the observed changes?
- Is the program worth the cost?

KEY CONSIDERATIONS

- Make sure GESI analysis is indicated in all scope of work (SoW) or terms of reference (ToR) program evaluation contracts.⁶⁷
- Use GESI-responsive indicators both qualitative and quantitative. Use these indicators in your baseline surveys and track them from the beginning of a program cycle.⁶⁸
- The evaluation team need to have at least one GESI expert. The person needs to have experience in designing or leading GESI-responsive evaluations or programs, and in conducting GESI analysis.

63 The World Bank (2001). Integrating a Gender Dimension into Monitoring & Evaluation.

64 Fehringer; et.al. (2017). Monitoring and Evaluation of Health Programs. UN Women (2015). How to Manage Gender-responsive Evaluation.

65 UN Women (2015). How to Manage Gender-responsive Evaluation.

66 Fehringer; et.al. (2017). Monitoring and Evaluation of Health Programs.

67 Save the Children (2014). Engendering Transformational Change.

68 Save the Children (2014). Engendering Transformational Change.

The person should also demonstrate an understanding of GESI issues⁶⁹ Additionally, all evaluation team members need to have strong knowledge of culture and social norms, cultural practices and perspectives, and key GESI issues in the area of interest. Moreover, the evaluation team should include both women and men who have expertise and experience in both quantitative and qualitative research methods, and at least one person with knowledge or experience of the sector of interest.⁷⁰ For example, if you are doing an evaluation in WASH sector, you need at least one person in the evaluation team who has expertise in WASH.

- Collect and analyze GESI data to identify any gaps for women, men, persons with disabilities and other vulnerable groups in access, participation, decision making, systems and well-being. Determine the main causes of these gaps, if any. Also identify both the positive and negative effects of the program on different social groups.
- Take corrective actions to fill the gaps and address negative and unintended effects of program activities.

The table below is a summary of important considerations in developing terms of reference and designing an evaluation.

Table 27 | Developing Terms of Reference and Designing an Evaluation

Terms of Reference
Does the Terms of Reference (ToR) mandate for gender equality and social inclusion in research assistants and survey takers?
Are gender-related and social inclusion questions included in the ToR.
Is it specified that the evaluation sample should include equitable representation of women to men and other marginalized people?
Is it stipulated that qualitative and quantitative methods are to be used, and are participatory methods requested as well?
Is it stipulated that women's and other marginalized people's empowerment should be measured?
Be explicit about collecting data around gender relations and/or the differential impacts of the project on men and women.
Be explicit about collecting data about the different marginalized people targeted in the project and the differential impacts of the project on those marginalized people.
Did you include questions on gender and social inclusion that matches the overall intent of the project's Theory of Change?
Gender and social inclusiveness should be considered in each of the technical evaluation questions and not just siloed into a 'gender section.'
Evaluation Design
Does the evaluation team include 50 percent women?
Is the unit of analysis individuals or households? How is the household defined and who is able/should speak on behalf of the household?
Does the evaluation include reviewing the budget and accounting for any deviations in GESI expenditure?
Will the evaluation document how the project has developed GESI innovations?

69 USAID (2014b). Gender-Sensitive Evaluation.

70 USAID (2014b). Gender-Sensitive Evaluation.

Will the evaluation document how the project shared best practices and knowledge exchanges on GESI?
Are questions included to measure gender and social dynamics at the household and community levels and individual agency?
Will the methods proposed allow for the collection of sex, age and disability disaggregated data for applicable indicators?
Is there a plan for long-term outcomes and the impact of GESI interventions to be measured?
Specify that the executive summary includes gender-related and social inclusion findings (successes and/or failures).
If the project failed to be inclusive due to the influence of gender and social norms, make sure the evaluator knows this learning should be documented and recommend for future projects to address them through programming.
Design a sampling strategy that stratifies by gender, or household type. Please note that results are typically skewed towards the male perspective if only household head is used.

PREPARING GESI PROGRAM EVALUATION REPORTS

It is important to apply critical GESI analysis when preparing an evaluation report. Do not only focus on input and output indicators. Successful measurement of outputs should move forward into outcomes and consider the context beyond the project to best capture GESI dynamics and the changing social status of women, men, persons with disabilities and other vulnerable groups. Projects which only measure output indicators will fail to capture gender and other social norm change and meaningful access, participation, decision making, systems, and well-being, resulting in a lack of information on what works or does not work.

Table 28 | Preparing GESI Program Evaluation Reports

Checklist for Preparing GESI Program Evaluation Reports	
1	Barriers to participation (if women, persons with disabilities and other vulnerable groups were not well represented) should be documented
2	The report should discuss if the project changed, reduced or eliminated stigma, prejudices and norms that exclude women, persons with disabilities and other vulnerable groups
3	The report should discuss if the project improved women and other excluded groups' access to resources, opportunities and services
4	The report should discuss whether the project led to women and other excluded social groups expressing their views during meetings and project events
5	The report should discuss whether the project led to improvements in women's and other excluded social groups' participations in the project
6	Were women and other excluded social groups seen in positions of authority in the community?
7	Does the report discuss the dimensions of exclusion that were not addressed by the project but that create barriers to inclusion?
8	Specific language should be used. e.g. define and describe who 'smallholder farmers' are, and make sure the language throughout the evaluation presents 'farmers' or 'participants' as both men and women

Checklist for Preparing GESI Program Evaluation Reports	
9	There should be a specific GESI section which details any GESI-specific matters, but also GESI matters should be referred to and linked throughout the report – not only discussed in the GESI section. The report needs to show that GESI has been used as a lens in conducting the evaluation, rather than simply pigeonholing certain issues by dedicating an entire section to them but ignoring them thereafter
10	Gender-related and social inclusion lessons should be captured and documented in the 'Recommendations' section to ensure learning is moving forward
11	Women's or marginalized group's voices should be framed by statements of representativeness. Cases or 'anecdotes' should not only be focused on literal indicators the project was interested in but should address context
12	The evaluation report should include programmatic information and identifies successful mechanisms for GESI related change, and links data to programmatic interventions
13	The evaluation results should speak to programmatic effectiveness for women participants and excluded groups, and not only accountability to funders regarding performance on targets

TOOL 4.3 ANALYZING AND REPORTING GESI-RESPONSIVE DATA

GESI-responsive data can be analyzed using a mixed method approach that integrates both quantitative and qualitative analytical methods. Quantitative analysis allows for comparison of numerical data disaggregated by sex, disability status and other social characteristics such as ethnicity, age, class, and caste. These comparisons highlight gaps and inequalities and encourage qualitative (non-numerical) analysis to identify why these gaps and inequalities exist. It is important that data is analyzed regularly and at all stages during the DME process in order to:

- Identify constraints and opportunities that either impede or facilitate the achievement of GESI objectives.⁷¹
- Assess changes in social and gender norms, roles, and responsibilities.
- Assess whether the practical needs, strategic interests, and priorities of different social groups are being addressed.
- Measure and evaluate the different impacts of the program on different social groups.
- Inform changes in program implementation to improve outcomes for social groups.

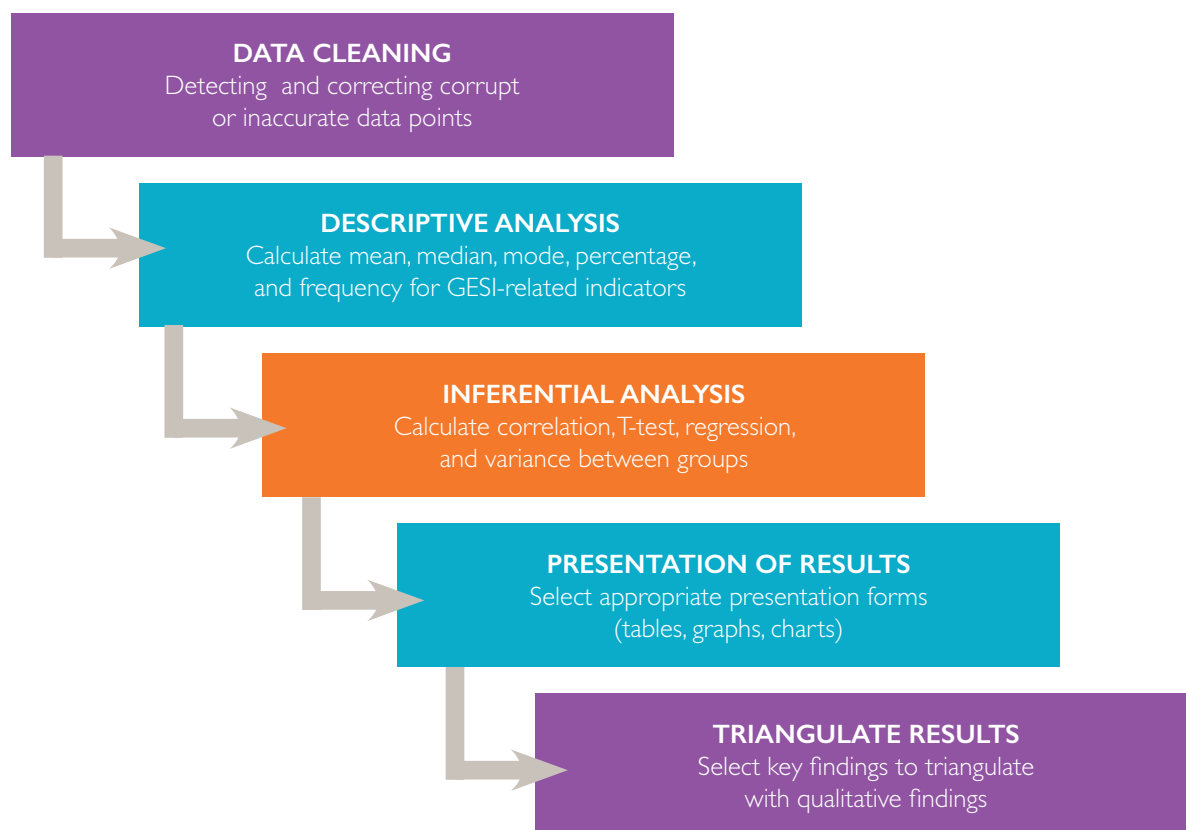
SUGGESTED PREPARATION FOR GESI-RESPONSIVE DATA ANALYSIS

- Gather all data collected, including facilitator notes and reflections, survey/questionnaire results, interview recordings, notes or photos.
- Identify priority data that is disaggregated by sex, disability status, age, and additional social characteristics for analysis.
- If any data is missing or needs clarification, consult with your M&E colleagues, data collectors, or enumerators.
- Ensure you have access to statistical software (SPSS, STATA, R), transcription software, or qualitative analysis software (NVivo, ATLAS.ti).

GESI QUANTITATIVE DATA ANALYSIS

GESI-responsive quantitative analysis is concerned with analysis of GESI disaggregated numerical data (data that can be quantified) such as age, family size, and income. It helps to answer the question “what.” For example, what is the average age of women, men and person with disabilities who have access to safe drinking water? What percentage of women, men, boys and girls feel empowered,? etc. Figure 7 presents important steps for quantitative data analysis.

Figure 7 | Steps for GESI Quantitative Data Analysis



Step by Step Guidance

Data Cleaning

Data cleaning detects and corrects or removes errors and inconsistencies in data that may be due to poor data collection and entry. Many statistical packages have in-house data validation functions designed to help you remove or correct data that could otherwise lead to false conclusions.

GESI Descriptive Analysis

Highlights differences in data between different disaggregated groups, potentially by sex, disability status, age, and other social characteristics. For example, if you wanted to know how gender and disability status impacted satisfaction with drinking water sources, you would disaggregate available data and present in a table as illustrated below:

Table 29 | An example of a GESI frequency table

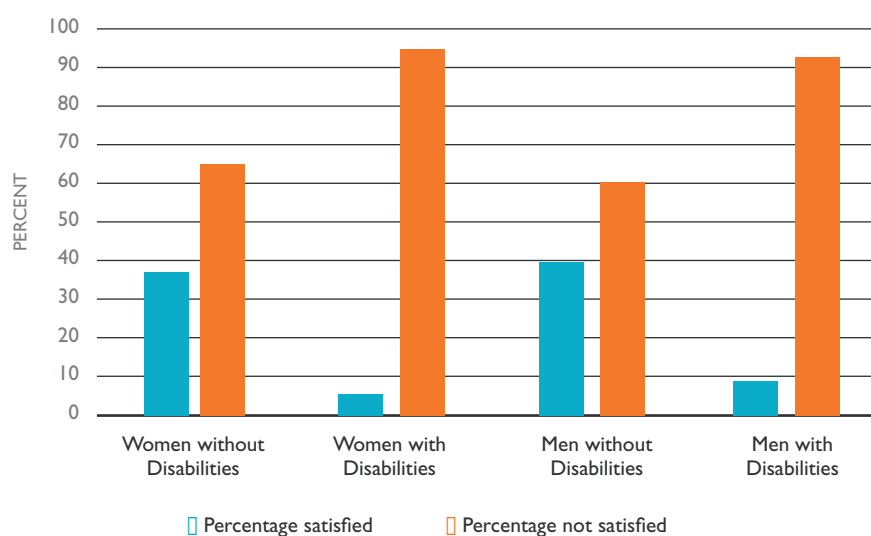
The percentage of people who feel satisfied with the quality of drinking water source by gender and disability status.

Gender and Disability Status	Total Number	Number Satisfied	Percent Satisfied	Number Not Satisfied	Percent Not Satisfied
Women without disabilities	625	226	36.2%	399	63.8%
Women with disabilities	112	7	6.2%	105	93.8%
Men without disabilities	859	343	39.9%	516	60.1%
Men with disabilities	130	10	7.7%	120	92.3%

This data could also be depicted in other formats including a bar graph below. You can also use a pie chart. You then need to describe your results.

Figure 8 | An example of a GESI bar graph

The percentage of people who feel satisfied with the quality of drinking water source by gender and disability status.



After you have presented your results using frequency tables, graphs or charts, you need to write a text describing your results.

Table 30 | An example of how to describe results to reflect GESI issues

Findings	Interpretation
The results show that most people were not satisfied with the quality of drinking water sources but both men and women with disabilities were much less satisfied with the quality of drinking water sources compared to those without disabilities (93% on average compared to 62% on average).	This means efforts should be made to ensure persons with disabilities are targeted in order to improve their access and satisfaction with the quality of drinking water sources.
There was little difference in satisfaction levels between men and women (less than 4%)	Note: Then you will need to use qualitative information to make sense of why this is the case.

Disaggregated data should be analyzed on a quarterly basis using a Time Series Analysis (TSA) or trend analysis to understand the effects of a program on different groups. In this case, you will want to see if the satisfaction levels of persons with disability improve after you have conducted a qualitative assessment to understand why they are unsatisfied and then take actions to address those reasons.

Table 31 | An example of a TSA GESI frequency table

The average percent of people who are not satisfied with quality of drinking water source.

Gender and disability status	Average Percent Not Satisfied			
	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Women without disabilities	63.8	60	55	46
Women with disabilities	93.8	80	54	42
Men without disabilities	60.1	58	40	22
Men with disabilities	92.3	78	52	43

This data would lead you to conclude that your actions have been successful in increasing the satisfaction of both men and women with disabilities. However women without disabilities are less satisfied than men without disabilities. You will then use qualitative information to make sense of why this is the case

GESI Inferential Analysis

Inferential analysis examines the relationships between variables among a subset of the population (such as a few different communities) to make a conclusion about a larger population. There are many types of inferential analyses that you can use to make sense of data. This toolkit provides two examples: correlation analysis and statistical significance test (T-test).

Correlation Analysis

Correlation analysis explores if two variables are related or connected. For example, you may want to know if the ability to make decisions regarding participation in self-earned cash activity is related to gender and disability status (see Table 16). Correlation analysis can also identify the strength of relationship (no relationship, strong or weak relationship) and whether the relationship is positive or negative. Knowing what and how variables are related is very helpful in understanding how program activities might affect different social groups positively or negatively. Correlation is calculated using statistical software such as STATA or SPSS. The closer to one the number is, the stronger the correlation (0.5 or above either positive or negative). If the correlation coefficient is 0, it means there is no correlation, +1 means perfect positive correlation, -1 means perfect negative correlation.

For example, if you calculated the correlation between the ability to make decisions regarding participation in self-earned cash activity and disability status, and the correlation coefficient (r) is -0.8. Then you will report that there is a strong negative correlation between the ability to make decisions regarding participation in self-earned cash activity and disability status. This means persons with disabilities are less able to make decisions regarding participating in self-earned cash activity compared to those without disabilities. You can use qualitative data to understand the reason for this negative correlation and identify ways to empower persons with disabilities to make decision regarding participating in self-earned cash.

GESI Statistical Significance Test (T-Test)

A T-test is a simple test in inferential statistics. Statistical significance means the probability that the results of the relationships between two variables is not likely to occur randomly or by chance. That means there are factors that are contributing to this relationship. T-test is used to compare the means of two groups and understand if they are statistically significantly different from each other; how significant the differences is (measured in means/averages) and if those differences could have happened by chance). The t- statistic is calculated using a statistical software such as STATA or SPSS. For example, you can calculate t-statistics for data collected in Table 17 that asks the following question:

Question	Answer
Do you participate in regular sanitation and hygiene behaviors?	1=Never 2=Sometimes 3=Most of the time 4=Always

You will need to make a claim to test a relationship. For example: "There is no statistically significant difference in the percentage of women and men who participated in regular sanitation and hygiene behaviors." This is called null hypothesis. There is an alternative hypothesis that assume the null hypothesis is wrong. It states that there is a statistically significant difference in the percentage of women and men who participated in regular sanitation and hygiene behaviors. You need to test the null hypothesis to find out how likely it is true.

Set the criteria (level of significance) upon which you will decide to accept or reject the null hypothesis. Compute the t- statistic using statistical analysis software to obtain p-values that you will use to make decision. The p-value is the probability generated that ranges between 0 and 1 and it cannot be negative. When the p-value is 5% or less ($p \leq .05$), you will reject the null hypothesis as this indicates a 95% confidence level that the null hypothesis is not true. You will know there is a statistically significant difference

in male and female participation. When the p-value is greater than 5% ($p > .05$), you will accept the null hypothesis and be 95% certain that there is no statistically significant difference in the percentage of women and men who participated in regular sanitation and hygiene behaviors.

Table 32 | An example of GESI T-Test Results

Participation in regular sanitation and hygiene behaviors by gender. You can do the same test for persons with disabilities

Level of Participation	Percentage		P-value
	Women	Men	
Never	15	30	0.05
Sometimes	30	45	0.25
Most of the time	50	23	0.01
Always	5	2	0.05
Total	100	100	

In this case you will read the p-values and use them to compare the percentages shown on the table for women and men. You will conclude that the percent of women who never participated in regular sanitation and hygiene behaviors was statistically significantly lower than men ($p=0.05$). Likewise, the percent of women who most of the time or always participated in regular sanitation and hygiene behaviors was statistically significantly higher than men (p-values are .01 and 0.5 respectively). However, the percent of women and men who sometimes participated in regular sanitation and hygiene behaviors is not statistically significantly different (because p-value is bigger than 0.05). This means even though the percentage of women who sometimes participate in regular sanitation and hygiene behaviors is lower than men, but the difference is just by chance (not statistically significantly different). The conclusion is that women participate more than men in hygiene and sanitation behaviors. There is a need to influence or sensitize men to participate more. You can use qualitative data to make sense of why this is the case. Additionally, you can use women as agents of change to influence men to participate more.

Triangulate

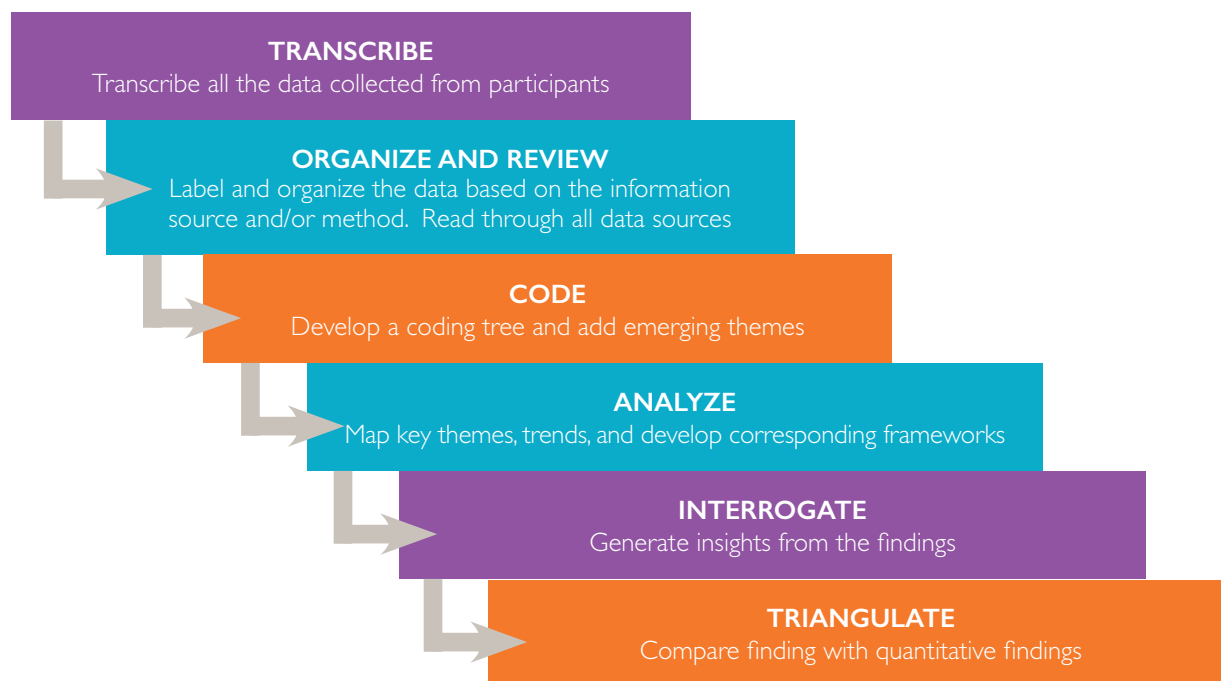
After your analysis, it is important to triangulate the data to explain some of the findings from quantitative results. You could use focus group discussions or secondary data measuring the same thing.⁷²

72 O'Connor and Gibson (2003). A Step-by-Step Guide to Qualitative Data Analysis.

GESI QUALITATIVE DATA ANALYSIS

Qualitative analysis analyzes non-numerical GESI disaggregated data such as feelings, thoughts, and perceptions.

Figure 9 | Steps for GESI Qualitative Data Analysis⁷³



Step by Step Guidance

Transcribe

Begin by transcribing all notes, responses, and comments. In each transcription, be sure to note who was speaking and any other identifying characteristics that you may have written in your notes. These details are important because if respondents share information related to any of the five GESI domains, it is helpful to know the social characteristics and power dynamics which may influence how they are marginalized or excluded. It is also important to include any observations or reflections in the transcriptions, because these can also provide helpful information about social and gender norms, roles, and responsibilities. For example, note whether certain individuals rarely participated or failed to make eye contact.

Organize and Review

After transcription, label and organize your data according to the source and/or method. You can do this by using your physical notes or a qualitative analysis software. For example, you may organize the data by the type of respondent, such as men, women, girls, and boys. Alternatively, you may choose to organize the data by data collection method, especially if each method is geared towards specific topics. The best way to organize your data is to go back and read your interview/discussion guide and try to identify the questions that you needed answers, the questions that came up during data collection and the topics that you had.⁷⁴ Then read through all the text at least to familiarize yourself with the content.

⁷³ Adapted from EAR. (undated). Ethnographic Action Research Training Handbook.

⁷⁴ O'Connor and Gibson (2003). A Step-by-Step Guide to Qualitative Data Analysis.

Code

After you have organized and reviewed data, you can code or categorize ideas, themes, concepts, or phrases. You may start out broadly and then identify sub-themes and more specific codes. A theme may include multiple ideas. Identify pull-out quotes that adequately summarize each theme. You can use the GESI domains as a way of structuring themes. Use Excel or sticky notes or qualitative analysis software, such as NVivo and ATLAS ti to code. If you establish codes before data collection based on themes identified within a literature review, apply these to your data. The following is an example of coding of data that was collected from a woman-only discussion group. You can do the same for men, persons with disabilities, and other groups.

Table 33 | An example of coded data

Topic	Responses	Codes
Access, ownership and control of land for women	Among the 15 women who attended the FGD, 10 of them have no formal education and the rest completed primary school. I asked if they have the right to own land, they all said no. They said they can access the family land and can use it, but they cannot claim ownership under customary laws. They also said they have no control over land because traditionally women are regarded as properties so a property cannot own property. Men own all the land in the community, but women are the one who work more on the land than men. I asked how they feel about that, they said they agree because when a woman get married, she literally moves to another family, so allowing women to own land can cause a family land to be transferred to another family.	Education Female education Access to land Ownership and control over land Attitudes towards access and control over land Social norms

Analyze

Once data has been coded, identify common themes, patterns, or trends. Identify exceptions and try to find possible explanations.

Interrogate

After conducting your general analysis, interrogate how/if responses vary according to the type of individual – women, men, persons with disabilities and other vulnerable groups. The following is a list of some helpful questions you may need to consider. The questions should focus on the GESI domains and are applicable to all types of programs:⁷⁵

- 1 Are there any gender and social norms that shape the life goals, aspirations, and well-being of vulnerable groups?
- 2 How are the roles, responsibilities and time use in paid work and unpaid work affect vulnerable groups in their household or community?
- 3 Do vulnerable groups have access to use productive resources, such as assets, income, public services (health, education, water), technology and information?
- 4 Do vulnerable groups have the ability to decide, influence, and exercise control over material, human, intellectual, and financial resources, in their families and/or communities?
- 5 Are vulnerable groups represented in decision-making positions, and do they exercise their voice in community organizations?
- 6 Do gender and social norms influence how vulnerable groups participate in activities and benefit from programs?
- 7 Is the community inclusive of persons with disabilities in terms of removing physical and attitudinal barriers?

75 Adapted from UNDP (2013). Gender Mainstreaming Made Easy, and USAID (2017). Integrating Gender Equality and Female Empowerment.

Triangulate

Try to confirm your conclusions with additional quantitative or qualitative data.

Reporting Qualitative Results

Start with your conclusion and back this up with your data and any secondary information sources. Where appropriate, outline differences in data between types of people, for example women, men, persons with disabilities and other vulnerable groups. You may use verbatim quotes from various social groups if you need to support your arguments or provide examples.⁷⁶ Discuss the implications of those findings for each social group, provide recommendations, and strategies for transformative gender equality and social inclusion programs.

COMMUNICATING AND REPORTING GESI FINDINGS

GESI findings and recommendations should be widely shared with World Vision staff and other partners in a way that enlightens programming and challenges discriminating social norms. This tool provides a checklist to ensure that any report achieves this.

Table 34 | Checklist for communicating and reporting GESI findings

Does the report/knowledge product:	I=Yes 0=No
Use positive images or photos of women and men, persons with disabilities and persons without disabilities and other marginalized groups?	
Uses image that encourage stereotypes? For example, are there photos of men looking after children, or only women; Are there pictures showing children with disabilities in a local school rather than a special school?	
Disaggregate achievements by sex, age, abilities, etc.?	
Include a section on GESI that specifically discusses GESI lessons learned?	
Integrated GESI throughout the other sections?	
Use neutral language? For example, "human power" instead of "manpower" humankind" instead of "mankind" or "person with disabilities"? instead of "disabled"?	
Describe women and persons with disabilities as vulnerable only, or are their strengths and achievements also reported?	
Report on GESI indicators and outcomes along with other indicators and outcomes?	
Discuss the differences between social categories and the reasons for those differences? or does it use generic terms such as "farmer"?	
Identify limitations related to the data sampling? For example, if particular groups (women, persons with disability etc.) were not included in the process and the implications on the results	
If women and marginalized groups are not equitably represented in the sample of respondents, is this explained in the limitations section of the methodology?	
Quote and consult groups that represent marginalized social groups?	
Quote GESI-responsive literature (e.g. does it quote authors from the Global South? ⁷⁷)	
Discuss how the positive impacts of GESI are promoted and how the negative impacts are mitigated or eliminated?	
Comment on the impact of activities on women's and vulnerable groups' empowerment (self-esteem, capacity for leadership and self-organization)?	
Report on the proportion of women and men who participate in project activities (as beneficiaries, decision-makers or change agents) during the reporting period?	
TOTAL SCORE	

N.B. **If your total score** is 13 or more, then you effectively reported GESI findings in appropriate ways and overcome biases and stereotypes about GESI

⁷⁶ O'Connor and Gibson (2003). A Step-by-Step Guide to Qualitative Data Analysis.

⁷⁷ The term 'Global South' refers, broadly, to Latin American, Asia, Africa and Oceania. The term signals a departure from a central focus on state of development (such as the term 'low-income countries') or cultural differences (such as the term 'Third World') focusing instead on geopolitical relations of power.

ANNEXES



ANNEX I GESI GLOSSARY OF TERMS

The following is a non-exhaustive list of core terms on GESI, adapted from a range of sources.

Term	Definition
Agency	Agency is attained when vulnerable individuals (and groups) who previously exercised little power develop their own capacities for self-understanding and expression, and gain control over their lives, resources, beliefs, values and attitudes. ⁷⁸ Agency facilitates self-empowerment— power to and power within —through individual consciousness and the transformation of personal attitudes, self-perceptions and power relations.
Disaggregated data	Data broken down by detailed sub-categories. Disaggregated data can reveal deprivations, exclusions and inequalities that may not be fully reflected in aggregated data. Data collected about people can be classified by sex, age, disability status, ethnic group, level of education, and rural–urban differences, among others.
Do-no-harm approach	A ‘do no harm’ approach in projects and programs requires ongoing analysis to ensure the potential risks of unintentionally perpetuating or reinforcing gender inequalities and social exclusion in the context of an intervention are continuously assessed and proactively monitored, and that corrective/compensatory measures are taken, if applicable. ⁷⁹
Empowerment	Varies over space and is context specific. It includes awareness-raising, building of self-confidence, expansion of choices, gaining control over resources and ideology and is connected to agency. It is relational and inherently political because the process is about shifts in power relations. Supportive relationships are crucial to promoting positive social change by transforming structures and institutions that reinforce and perpetuate discrimination and inequality. ⁸⁰
Equality	The state or condition that affords all people equal enjoyment of human rights, socially valued goods, opportunities, and resources. More than parity or laws, genuine social equality is expanded freedom and improved overall quality of life for all.
Equity	The process of being fair to all people. To ensure fairness, measures are required to compensate for the cumulative and historical economic, social, and political disadvantages that have and continue to prevent disadvantaged groups from operating on a level playing field.
GESI integration	Refers to strategies applied in program assessment, design, implementation, and evaluation to take GESI perspective into account and to address gender inequality and social exclusion. ⁸¹
GESI relations	Refers to social relations between and among individuals or groups of different genders and/or social statuses in which a society defines their rights, responsibilities and their identities in relation to one another.
Gender roles	Refers to the socially and culturally assigned behaviors, attitudes, attributes, responsibilities and activities of people based on their gender. Social and cultural factors that shape gender roles include country or region, ethnic group, age, economic class or religion. ⁸²

78 World Vision (2020). The World Vision Approach and Theory of Change.

79 Meyers and Jones (2012). Gender Analysis, Assessment and Audit.

80 Jost et. al. (2014). Gender and Inclusion Toolbox.

81 Social Development Direct (2017). Gender Equality and Social Inclusion Strategy.

82 Jost, et. al. (2014). Gender and Inclusion Toolbox.

Term	Definition
Gender-based violence (GBV)	An umbrella term for any harm that is perpetrated against a person's will that has a negative impact on the physical or psychological health, development and identity of the person; and that is the result of gendered power inequities that exploit socially ascribed distinctions between males and females, and among males and among females. GBV is rooted in economic, social, and political inequalities between men and women, and the nature and extent of specific types of GBV vary across cultures, countries and regions.
GESI-transformative	<p>GESI-transformative program approaches actively strive to examine, question, and change harmful social norms and power imbalances as a means of reaching gender equality and social inclusion objectives. GESI transformation is an ongoing and relative concept that seeks to shift social roles and relations closer to equality and social inclusion in any given context. As cultures and societies evolve differently, what is transformative in one context may not be transformative in another. GESI approaches typically tackle one of the decision-making, equal systems and participation domains in addition to addressing access and well-being:</p> <ul style="list-style-type: none"> • fostering critical examination of inequalities and social roles, norms, and dynamics; • recognizing and strengthening positive norms that support equality, social inclusion and an enabling environment; • promoting the relative position of women, girls, and other vulnerable groups; and • changing underlying social structures, policies, and broadly held social norms that perpetuate inequalities and social exclusion.
Intersectionality	The interplay of multiple social characteristics (such as gender, race, class, disability, marital status, immigration status, geographical location level of education, religion, ethnicity) that increases vulnerability and inequality in privilege and power, and further entrenches inequalities and injustice. These characteristics are interconnected and cannot be examined separately from one another. ⁸³
Persons with disabilities	All persons with disabilities including those who have long term physical, mental, intellectual or sensory impairments, which in interaction with attitudinal and environmental barriers hinders the full and effective participation in society on equal terms. ⁸⁴
Social inclusion	Refers to the removal of institutional barriers and creating a situation where all members and segments of society enjoy equal rights, benefits and participation in the political, economic and social spheres without discrimination based on sex, age, ethnicity, disability status, education, economic status, caste, religion, and others. ⁸⁵ Social inclusion improves the ability, opportunity, and dignity of people that are disadvantaged on the basis of their social characteristics to take part in society.
Vulnerable groups	Group(s) of individuals who are disadvantaged and are more susceptible to falling into poverty and other harms, than other members of the population because they hold less power; are more dependent, are less visible, or are otherwise marginalized. These groups may include female-headed households, the elderly, orphans, destitute families, persons with disabilities, racial and ethnic minorities, migrants, refugees, and people living with HIV, or with other chronic health challenges.

83 MenEngage Alliance (2019). Accountability Training Toolkit.

84 UN (2008). Convention on the Rights of Persons with Disabilities.

85 Social Development Direct (2017). Gender Equality and Social Inclusion Strategy.

ANNEX 2 ILLUSTRATIVE GESI INDICATORS

Annex 2 does not present an exhaustive list of GESI indicators, rather illustrative examples especially indicators that are measured by other organizations. World Vision already has a standard list of program monitoring and evaluation indicators available via HORIZON – the partnership information management system.⁸⁶ The World Vision United States' Grant Management Information System known as SINAI⁸⁷ has over 1,400 indicators that are available via HORIZON and most are standardized indicators by major public donors for international development and relief programs. Indicators in these information managements systems should be the first point of reference in selecting GESI indicators. The illustrative indicators included in this section should serve additional and tailored GESI indicator needs.

Illustrative GESI Indicators Relevant to All Sectors

The following table of indicators is intended to be used in all World Vision programs to ensure that basic data is collected regarding marginalized groups everyday experiences, relations, and practices. These indicators are general or cross-cutting and have been selected from World Vision and resources published by the ADB (2013a), CARE (2018), USAID and other international donors.

Table 35 | Common/Cross-Cutting Indicators for all Sectors

	GESI Domain	Result Level
% of women, men and persons with disabilities who report owning and controlling productive resources (e.g. Land, technology, livestock, income) and have skills to use them productively	Access	Outcome
% of women, men and persons with disabilities reporting they make important decisions for their household ("important" is intentionally subjective)	Decision-making	Outcome
% of women, men and persons with disabilities reporting they are involved in decisions about daily household needs	Decision-making	Outcome
% of women, men and persons with disabilities reporting they participate in community level meetings or other collective groups	Participation	Outcome
% of women, men and persons with disabilities reporting they feel confident speaking about gender equity, social inclusion, and other community issues at the local level	Participation	Goal
# and % of women, men and persons with disabilities who have participated in an awareness raising/training session regarding gender equality and social inclusion in their community	Participation	Output
# of projects that implement activities to ensure more equal opportunities for marginalized groups	Systems	Outcome
Availability of policies, laws, and institutions related to promoting and ensuring gender equity and social inclusion at different levels.	Systems	Goal
% of women, men and persons with disabilities reporting feeling empowered (whatever it means to them)	Well-being	Outcome

⁸⁶ Horizon: www.wvhorizon.org/horizon/default.aspx.

⁸⁷ SINAI: worldvision.mysalesforce.com/

	GESI Domain	Result Level
% of women, men and persons with disabilities reporting feelings of confidence, self-esteem, and self-efficacy	Well-being	Outcome
% of women, men and persons with disabilities reporting feeling respected and valued in their household and community	Well-being	Outcome
% of women, men and persons with disabilities reporting feeling safe and secure in their household and community	Well-being	Outcome
% of women, men and persons with disabilities reporting they have freedom of mobility	Well-being	Outcome

Illustrative GESI Indicators for Health Sector

This table includes indicators adapted from the ADB (2018) and JHPIEGO (2019). The indicators were selected to highlight the ways in which individuals and groups may experience discrimination or marginalization while accessing and making decisions about healthcare.

Table 36 | Health Indicators

	GESI Domain	Result Level
# and % of males, females and persons with disabilities accessing appropriate sexual and reproductive health services	Access	Output
# and % of males, females and persons with disabilities accessing basic health services (primary care)	Access	Output
# and % of males and females and persons with disabilities reporting increased awareness of where and how to access health services	Access	Output
Extent to which males and females and persons with disabilities feel they receive adequate health services	Access Well-being	Outcome
Ratio of female to male SRH workers in local health facilities	Access	Outcome
# and % of adolescent boys and girls who access age appropriate SRH information	Access	Outcome
Proportion of women with access to maternal health services within one hour's walk	Access	Outcome
Proportion of pregnant women who received prenatal and postnatal care from trained staff	Access	Outcome
Percentage of men, women and persons with disabilities who received information on family planning and reproductive health issues	Access	Outcome
Proportion of males and females who think that a couple should decide together whether to have children	Decision-making	Outcome
% of males, females and persons with disabilities reporting independent decisions and joint decisions on how and when to use the health services	Decision-making	Outcome

	GESI Domain	Result Level
Proportion of males and females who think that a man and a woman should decide together which contraceptive to use	Decision-making	Outcome
Proportion of men and women (ages 15-49) who make informed decisions regarding sexual relations, contraceptive use, and reproductive healthcare	Decision-making	Outcome
% of couples who report increased communication about health and reproductive decisions	Decision-making	Outcome
# and % of males and females taking care of sick individuals	Participation	Outcome
# of hours spent taking care of sick individuals by men and women	Participation	Outcome
# of males, females and persons with disabilities who attend training focused on GBV	Participation	Outcome
Extent to which healthcare providers have the capacity to respond to cases of GBV	Systems	Outcome
Evidence that legal or regulatory barriers preventing women from accessing reproductive health services have been removed	Systems	Outcome
Evidence that health policies and plans utilized in local providers are based on gender differences in health risks	Systems	Outcome
Extent to which males, females and persons with disabilities feel they are treated with respect and dignity by health service providers	Well-being	Outcome

Illustrative GESI Indicators for Food Security and Livelihoods Sector

This table of indicators was created using selected indicators from CARE (2018) and WFP (2016). The indicators were selected to help measure inequalities in the ways individuals and households produce and consume food. The indicators are also intended to shed light on the roles and responsibilities in the agricultural sector, as it is a main livelihood for many rural populations and is often shaped by local gender and social norms.

Table 37 | Food Security and Livelihoods Indicators

	GESI Domain	Result Level
% of women, men and persons with disabilities reporting increased access to important agricultural and food resources, services, and opportunities	Access	Outcome
% of women, men and persons with disabilities owning productive land/property	Access	Outcome
% of men, women and persons with disabilities accessing inputs for livelihoods activities (business training, loans)	Access	Outcome
% of men, women and persons with disabilities accessing adequate food resources (either through production or market)	Access	Output

	GESI Domain	Result Level
# and % of male and female farmers with access to productive inputs (fertilizers, seed varieties, irrigation technologies/systems).	Access	Output
# and % of men, women and persons with disabilities accessing information and training from agricultural extension agents or farming centers/schools	Access Systems	Output
# and % of men and women farmers accessing loans for agricultural production and/or business	Access Systems	Output
Male and female food consumption frequency and nutrient values	Access	Outcome
Intra-household distribution of food patterns (how much and what is consumed by each member of the household)	Access	Outcome
Prevalence of stunting, wasting, and undernourishment	Access	Outcome
# and % of males and females who decide which crops to farm, and which methods and inputs to use (may vary by crop type)	Decision-making	Output
# and % of males and females who decide how to use income generated from crops, livestock, and other food product sales	Decision-making	Output
# and % of males and females who decide crops to market vs. keep for home consumption	Decision-making	Output
# of women and men from male-headed households reporting joint-decision-making over the use and purchase of agricultural inputs and incomes	Decision-making	Output
# of males and females who participate in different farming activities: land preparation, planting, weeding, cultivation, storage, processing, marketing	Participation	Output
# of hours males and females spend in formal and informal income-generating work	Participation	Output
% of males and females who engage in collecting fuel for cooking purposes	Participation	Output
# of hours spent by males and females preparing food	Participation	Output
Extent to which males and females report feelings satisfied with their livelihood activities	Well-being	Outcome
Extent to which males and females report they desire changes in their livelihood activities	Well-being	Outcome
Proportion of males and females reporting they have coping strategies for periods of food insecurity or loss of income-generating activity	Well-being	Outcome

Illustrative GESI Indicators for Education and Child Protection Sector

This table of indicators draws upon a toolkit from Save the Children (2014) and World Vision 2015⁸⁸ and focuses on measuring changes in the ways marginalized children access and benefit from more equitable education and child protection services.

Table 38 | Education and Child Protection Indicators

	GESI Domain	Result Level
# and % of children (girls and boys, children with disabilities) with access to school within reasonable distance from home	Access/ Equal systems	Outcome
# of hours or average time spent traveling to school (girls and boys, children with disabilities)	Access	Outcome
Proportion of children (girls and boys, children with disabilities) who are functionally literate	Access	Outcome
Proportion of children under five (girls and boys, children with disabilities) with diarrhea who received treatment of diarrhea	Access	Outcome
# and % of children (girls and boys, children with disabilities) who access important school materials—uniforms, books, electricity for homework completion	Access	Output
# and % of children (girls and boys, children with disabilities) who access Child friendly spaces	Access Systems	Output
# and % of mothers and fathers with access to child protection services	Access	Output
# and % of men and women from male-headed households reporting joint decision-making about child education attendance	Decision- making	Outcome
% of children (girls and boys, children with disabilities) participating in various school activities, such as clubs, sports, etc.	Participation	Outcome
Extent of children's meaningful participation in classrooms	Participation	Outcome
Prevalence of stunting in children (girls and boys, children with disabilities) under five years of age	Well-being	Outcome
# of schools utilizing gender-sensitive and socially inclusive teaching and learning methods	Access	Outcome
# and % of children (girls and boys, children with disabilities) reporting they have experienced sexual violence	Well-being	Output
Extent of satisfaction of children (girls and boys, children with disabilities) that the teaching methods teachers use meet their specific needs	Well-being	Outcome
Extent to which male and female parents are satisfied with the quality of their child's education	Well-being	Outcome
Level of understanding that male and female parents' have about children's experience of GBV and forms of social discrimination	Well-being	Outcome
Coverage of essential vaccines among children of different gender and age	Well-being	Outcome

Illustrative GESI Indicators for Humanitarian and Emergency Assistance

This section contains indicators selected from the Inter-Agency Standing Committee (2017) *Gender Handbook for Humanitarian Action* and ADB's(2013a) toolkit. The indicators are intended to highlight potential disparities in the ways that marginalized individuals and groups access and utilize resources and services which are critical to their well-being during emergency and crisis situations.

Table 39 | Humanitarian and Emergency Assistance Indicators

	GESI Domain	Result Level
% of males, females and persons with disabilities accessing adequate food and nutrition resources (either through production, market, or distribution services)	Access	Output
# and % of males, females and persons with disabilities accessing adequate health services	Access	Output
# and % of males, females and persons with disabilities accessing safe drinking water	Access	Outcome
Evidence that males, females and persons with disabilities have access to water and sanitation sites which are culturally appropriate, well lit, and in safe locations	Access	Outcome
Evidence that temporary shelter is appropriate, safe, private, and well-lit for vulnerable groups	Access	Outcome
% of boys and girls and children with disabilities accessing and attending school during humanitarian crisis or emergency	Access	Output
# and % of children (girls and boys, children with disabilities with access to child friendly space during crises and emergency	Access	Output
# and % of males, females and persons with disabilities who access protection, security, or referral services which meet the gendered and disability needs	Access	Output
# and % of males, females and persons with disabilities accessing cash grants or credits for establishing livelihoods	Access	Output
Evidence that skills training and livelihood programs target the specific needs of men, women and persons with disabilities	Access	Outcome
% of males and females who make decisions about which livelihoods activities to pursue during emergency	Decision-making	Outcome
% of males and females who make decisions about how to utilize food and nutrition resources and services provided during emergency	Decision-making	Outcome
% of males and females who make decisions about how to utilize health resources and services provided during emergency	Decision-making	Outcome
# and % of males and females reporting joint decision-making over the critical services and resources they receive during emergency	Decision-making	Outcome

# and % of males, females and persons with disabilities participating in income-generating activities	Participation	Output
# and % of males, females and persons with disabilities participating in skills and capacity training or workshops	Participation	Output
# and % of males, females and persons with disabilities participating in training about their rights and entitlements	Participation	Output
Extent to which males, females and persons with disabilities feel safe and protected during emergency	Well-being	Outcome
Extent to which males, females and persons with disabilities feel they are self-reliant and not dependent on external support	Well-being	Outcome

Illustrative GESI Indicators for WASH Sector

This section has selected indicators from Plan International (2018), and mainly focuses on the roles and responsibilities surrounding water access and use, as these are often shaped by engrained gender and social norms.

Table 40 | WASH Indicators

	GESI Domain	Result Level
% of males, females and persons with disabilities accessing adequate safe drinking water	Access	Output
% of males, females and persons with disabilities accessing sanitation services	Access	Output
# and % of males, females and persons with disabilities accessing sanitary toilet systems/technologies	Access	Output
# and % of boys and girls practicing in hygiene and sanitation practices at school and home	Access	Output
% or # water points and latrines that are universal in design	Access	Output
% of males and females reporting making decisions about the use of water (i.e. how much to use and for what purposes)	Decision-making	Outcome
# and % of males and females reporting independent decisions about the source of drinking water	Decision-making	Outcome
# and % of males, females and persons with disabilities making decisions about the use of sanitary practices and technologies (such as type of toilet in the household)	Decision-making	Outcome
Men, women and persons with disabilities' level of participation in community WASH activities (developing well for public use, working in community water distribution system, etc.)	Participation	Outcome
% of males, females and persons with disabilities participating in water user associations	Participation	Outcome

	GESI Domain	Result Level
# of trainings in WASH geared towards diverse social groups which are socially and culturally appropriate	Participation	Output
# and % of males and females and persons with disabilities participating in WASH trainings	Participation	Output
# and % of males, females and persons with disabilities responsible for collecting water, and hours spent	Participation	Outcome
# and % of males, females and persons with disabilities reporting regular sanitation & hygiene behaviors	Participation	Outcome
# and % of males, females and persons with disabilities utilizing WASH technologies (hand-washing stations, water filters, sanitary latrines) in their household	Participation	Outcome
Men and women's level of satisfaction with division of time and labor spent collecting water for women	Well-being	Outcome
Men and women's level of satisfaction with the quality of drinking water source	Well-being	Outcome
Men and women's level of understanding of health hygiene and sanitation practices	Well-being	Outcome

Illustrative GESI Indicators for Economic Empowerment Sector

This section draws upon indicators from ADB (2013a), CARE (2018), Oxfam (2017), and World Vision's (2019) current draft of gender-transformative indicators. The indicators below were chosen in order to highlight how marginalized individuals and groups experience changes in their income-generating roles and responsibilities. These changes pertain to types of labor, decision-making over income and resources, participation in capacity-building trainings, and satisfaction with income-generating activities and benefits.

Table 4I | Economic Empowerment Indicators

	GESI Domain	Result Level
% of males, females and persons with disabilities reporting access to and control over resources they need for income-generating activities	Access	Outcome
% of males, females and persons with disabilities reporting ownership of resources they need for income-generating activities	Access	Outcome
% of males, females and persons with disabilities who have access to financial services	Access	Outcome
# and value of loans taken for business or other income-generating activities	Access	Outcome
# of males and females and persons with disabilities with increased incomes	Access	Outcome
% change in income disparity between men, women, and other social groups	Access	Outcome
Proportion of males and females engaging in unpaid domestic care work	Access	Outcome

	GESI Domain	Result Level
% of males and females who believe it is acceptable for women to work outside the home	Access	Outcome
% of males and females reporting satisfaction about the distribution of leisure time in their household	Access	Outcome
% of individuals reporting the husband has increased his participation in domestic and care work	Access	Outcome
% of males and females reporting decision-making power over the inputs and equipment they use for income generating activities	Decision-making	Outcome
% of males and females reporting independent or joint decisions about how to use their income	Decision-making	Outcome
# and % of males and females reporting they make independent decisions about which livelihood activities to pursue	Decision-making	Outcome
# and % of males and females reporting they have decision-making power over important household expenditure	Decision-making	Outcome
# and % of males and females participating in an income-generating activity	Participation	Outcome
# and % males and females who participate in trainings to increase their skills and knowledge for employment opportunities	Participation	Output
% of males and females participating in a business group, savings or credit group or cooperative	Participation	Outcome
# and % of males and females who participate in the market as vendors, suppliers, or wholesalers	Participation	Outcome
% of males and females in a key community leadership position	Participation	Outcome
Amendments to laws or policies which address barriers to marginalized individuals' economic empowerment or employment	Systems	Outcome
# and % of males and females trained in their legal rights as employees	Access	Output
% of males and females who report they are worrying less about providing necessities in their household	Well-being	Outcome
Extent to which males and females express confidence in their ability to support themselves and their family	Well-being	Outcome
Extent to which males and females express confidence in their communication and negotiation skills	Well-being	Outcome

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