



GENDER EQUALITY, DISABILITY AND SOCIAL INCLUSION ANALYSIS

GOOD PRACTICE NOTE

1. OVERVIEW

The Australian Government is committed to advancing gender equality through the development program. DFAT requires Official Development Assistance (ODA) investments valued at \$3 million and over to include a gender equality objective (either End of Program Outcome or Intermediate Outcome). This will lead to more investments having a ‘principal’ or ‘significant’ focus on gender equality according to the [OECD DAC Gender Equality Policy Marker](#).¹ These investments must meet the OECD minimum criteria for gender equality, one of which is a requirement for designs to include gender analysis. These DFAT measures are aligned with the Australian Government’s introduction of gender responsive budgeting.

DFAT recommends that investments should be informed by Gender Equality, Disability and Social Inclusion (GEDSI) analysis. GEDSI analysis assesses and understands differences in social norms, relations and power dynamics experienced by individuals as a result of their social identities, including gender, age, disability, income, education, faith, race, ethnicity, sexuality and migration status; and explores how these identities intersect to create diverse experiences of exclusion and marginalisation.² DFAT focuses on women, girls, LGBTQIA+ people, and people with disabilities within GEDSI analysis because these groups experience systemic discrimination, resulting in the denial of their rights and lack of access to opportunities.

GEDSI analysis is the foundation for ensuring all DFAT investments are effective in reaching socially disadvantaged groups – by preventing unintended harm, exclusion, and further marginalisation, and by promoting their rights, equitable opportunities and benefits.

This Good Practice Note supports DFAT investment managers and development partners to meet the investment-level requirement for high quality, evidence-based GEDSI analysis. It provides a basis for joint planning and decision-making by investment managers and design teams and applies equally to both DFAT-led and Partner-led design pathways. For DFAT-led design pathways, investment managers should share this Good Practice Note with design teams to inform their approach to GEDSI analysis. For Partner-led design pathways, investment managers should share this Good Practice Note with partners to guide their approach to GEDSI analysis, noting that they may have their own established GEDSI analysis methodologies. However, Partner-led analysis and design must still meet the key features of good practice GEDSI analysis. Investment managers can assess the quality of both DFAT-led and partner-led GEDSI analysis using the checklist below. DFAT’s requirement for investment-level gender analysis is aligned with the Commonwealth Government’s requirement that policy development processes include gender impact assessment.

¹ The minimum criteria for an investment to have gender equality as the principal or a significant objective are set by the OECD DAC. Gender equality is considered a significant objective where it is an important and deliberate objective, but not the principal reason for undertaking the investment. The investment, in addition to other objectives is designed to have a positive impact on advancing gender equality and/or the empowerment of women and girls, reducing gender discrimination or inequalities, or meeting gender-specific needs. Gender equality is considered the principal objective where gender equality is the main objective of the investment and is fundamental to its design and expected results. The investment would not have been undertaken without this gender equality objective.

² THET Partnerships for Global Health (2019) *Gender Equality and Social Inclusion (GESI) Toolkit for Health Partnerships*. London.

The note is aligned with the [Gender Equality in Investment Design Good Practice Note](#), the [Gender Equality in Monitoring and Evaluation and Reporting Good Practice Note](#), the [Disability Inclusion in the DFAT Development Program Good Practice Note](#), and relevant chapters of the [Aid Programming Guide](#).

2. CHECKLIST – KEY FEATURES OF GOOD PRACTICE GEDSI ANALYSIS

Approach and analytical framework

- ✓ Analysis clearly linked to an analytical framework (e.g., Gender at Work Framework) which unpacks gender and social norms, relations, and power dynamics into key dimensions where inequities and discrimination are most prevalent and pervasive.
- ✓ Analysis takes account of intersectionality and considers people’s multiple identities and how these shape their differing experiences, concerns, needs, and capabilities.

Scope

- ✓ Analysis draws on both primary and secondary data that is specific to the country, target location, sector, and investment.
- ✓ Where analysis relies on secondary data, that data is less than three-years-old, and is specific to the country, target location, sector, and investment.

Methodology

- ✓ Analysis takes a ‘do no harm’ approach to data collection, considering and minimising potential risks and harm to both participants/ respondents and enumerators/ researchers.
- ✓ Analysis combines quantitative and qualitative data collection methods to generate measurable gaps and disparities between diverse groups of people and identify patterns of inequality.
- ✓ Analysis uses participatory methods to ensure diverse groups of people participate equally in the research, and makes specific effort to engage ‘hard-to-reach’ groups i.e., those who are less visible within their households and communities.
- ✓ Analysis ensures consultation with partners and local organisations such as women’s rights organisations (WROs) and organisations of persons with disabilities (OPDs) to better understand specific gender equality, disability, and social inclusion issues relevant to the target location, sector, and investment.
- ✓ Analysis has been conducted by those who have expertise in gender equality, disability, and social inclusion.

Analysis

- ✓ Analysis is disaggregated by sex, age, and disability as a minimum and, where practicable, gender identity.
- ✓ Analysis provides a sufficient level of detail to inform the investment design and identifies: a) where inequalities exist between women, men, girls, boys, gender diverse people and people with disabilities; b) why these disparities exist; c) potential constraints and barriers for women, men, girls, boys, gender diverse people and people with disabilities in accessing and benefitting from the investment; and d) potential solutions to these issues.
- ✓ Analysis takes a ‘do no harm’ approach and considers the impact (intended and unintended) that the investment could have on women, men, girls, boys, gender diverse people and people with disabilities and provides strategies for avoiding or minimising negative impacts on these groups.

Action

- ✓ Analysis provides recommendations on where assistance should be targeted and which gender equality, disability, and social inclusion activities should be included and/or adapted as part the design.

3. WHY GENDER EQUALITY, DISABILITY AND SOCIAL INCLUSION?

Gender is one way to structure power, but access to power, in all of its forms, differs depending on a person's age, disability status, income, education, faith, race, ethnicity, sexuality, migration status, and other social markers.

While gender analysis uses gender as the primary lens to understand people's different experiences, GEDSI analysis recognises that there are particular groups of people (regardless of gender) who experience marginalisation and exclusion as a result of multiple and intersecting identities. This is called 'intersectionality.'

Intersectionality recognises that an individual's identity has many layers, and each layer may confer either negative or positive status and may either close or open access to resources and power. Intersectionality does not sideline gender, but moves away from focussing on single or isolated causes in analysing and explaining the dynamics of power and inequality. Figure 1 illustrates the social systems and structures which can combine, overlap and compound to affect an individual's identity, social position and experience.³

Quality GEDSI analysis takes an intersectional approach, considering how people's multiple identities influence their lived experiences of privilege, exclusion and marginalisation. Intersectional GEDSI analysis enables better targeted and more effective programming.

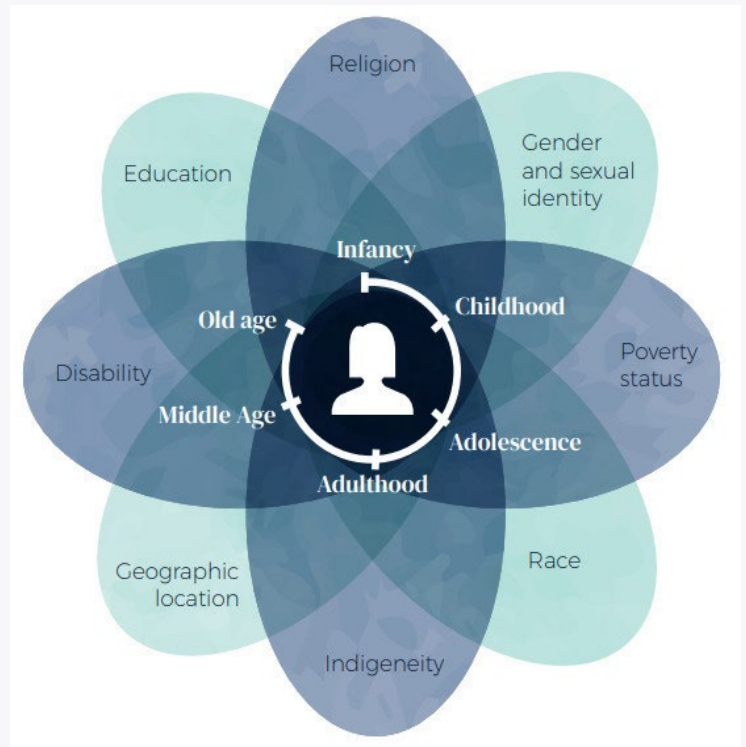


Figure 1. Identity and different forms of discrimination.

RESOURCES

For further information on intersectional approaches see the following:

[Gender at Work, Intersectionality Capacity Development Resource Kit](#): Introduces the concept of intersectionality and supports discussions about intersectionality to identify opportunities, actions and areas for improvement.

[UN Women, Intersectionality Resource Guide and Toolkit](#): Provides a practical framework and tools for reducing inequalities faced by people experiencing diverse and compounded forms of discrimination.

³ Adapted from Equality Institute (2019) *Identity and different forms of discrimination*. Melbourne.

4. DFAT APPROACH TO GEDSI ANALYSIS

Gender equality analytical frameworks unpack gender and social norms, relations, and power dynamics into key dimensions where inequities and discrimination are most prevalent and pervasive. They provide a structured and consistent approach for analysis to inform the design of equitable and inclusive programs.

DFAT uses the [Gender at Work Framework](#) to make visible the interlinked dimensions of gender equality, disability and social inclusion (Figure 2).

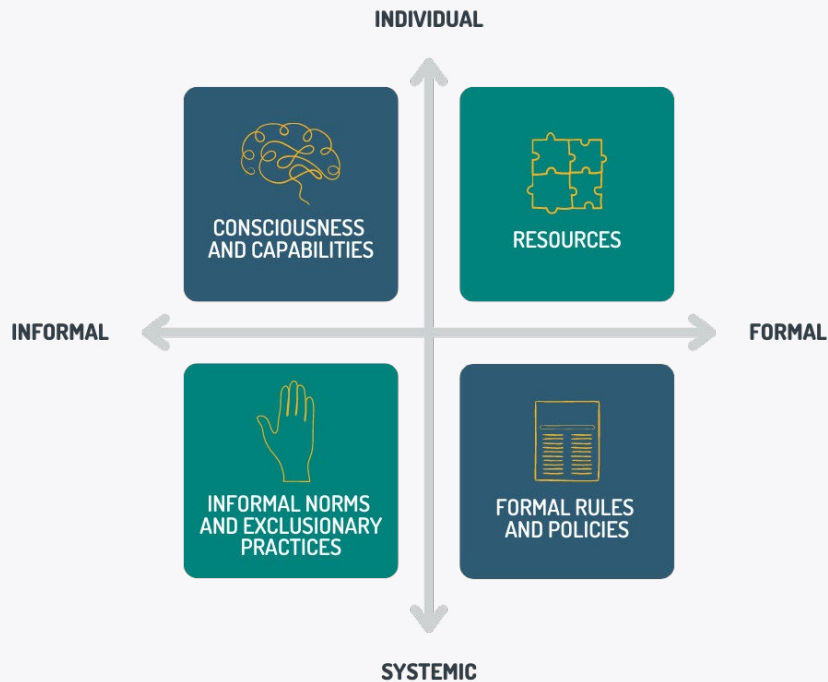


Figure 2. Gender at Work Framework

The Gender at Work framework explores two primary dimensions: i) **individual through to collective or systemic levels** across all strata of society, and ii) all visible and invisible forms of power, from **social norms and exclusionary practices through to formal laws and policies**. These two dimensions are divided into four intersecting areas of inquiry. The top two areas of inquiry map the individual, family and community level elements, while the bottom two are systemic and structural. The areas of inquiry on the right map the formal and tangible while the left domains cover the informal, intangible elements.⁴ An effective – and intersectional – GEDSI analysis will interrogate the relationships between each of the four areas of inquiry.

The top left area of inquiry considers **agency, commitment, knowledge and skills** needed for equality. The top right area of inquiry is about **access to and control over resources, services and opportunities**. The bottom right area of inquiry considers **laws, policies, programmes, resource allocation and accountability** mechanisms; these are the visible rules that govern changes in terms of equality. The bottom left area of inquiry is often least considered and focuses on the impact of **social norms, attitudes, exclusionary practices** on equality.⁵

The Gender at Work framework should be applied in a dynamic way – it must be adapted for socio-cultural, geographic and sectoral differences; and whilst investments should work across both dimensions, not all investments can target all four areas of inquiry or each area of inquiry to the same degree. Figure 3 illustrates how the Gender at Work Framework can be used in identifying GEDSI analysis research questions in a specific sectoral context (for example, a private sector market systems development investment). Sector-specific research questions are needed to inform investment designs. Sector-specific resources are available on the [SURGE Knowledge Hub](#).

⁴ UN Women, United Nations Entity for Gender Equality and the Empowerment of Women (2022) *Intersectionality Resource Guide and Toolkit: An Intersectional Approach to Leave No One Behind*. Washington D.C.

⁵ Ibid



Figure 3. An example of the Gender at Work Framework contextualised for a market systems development investment

RESOURCES

For further information on the Gender at Work Framework see the following:

[Gender at Work Framework: Explained](#): Explains the Gender at Work analytical framework and how to use it.

5. STEP BY STEP – CONDUCTING GEDSI ANALYSIS

STEP 1 – SCOPE

Whilst DFAT investment designs valued at \$3 million and over must be informed by gender analysis (preferably GEDSI analysis) the scope of that analysis depends on the availability, currency, and quality of existing gender analyses.

DFAT requires GEDSI analysis to be carried out as part of the investment design process. Conducting the analysis before or during design presents the most opportunity for an investment to effectively respond to identified issues. However, time and resource constraints sometimes mean that in-depth analysis will be conducted after the design phase. If conducting GEDSI analysis during the design is not possible, the design document must: draw on relevant existing information to clearly articulate the main gender inequities to be addressed by the investment (and attach this as an annex to the design); include a clear time frame and sufficient budget for in-depth analysis to be conducted during the inception phase; and provide flexibility to adapt program outcomes and activities based on the findings of the analysis.

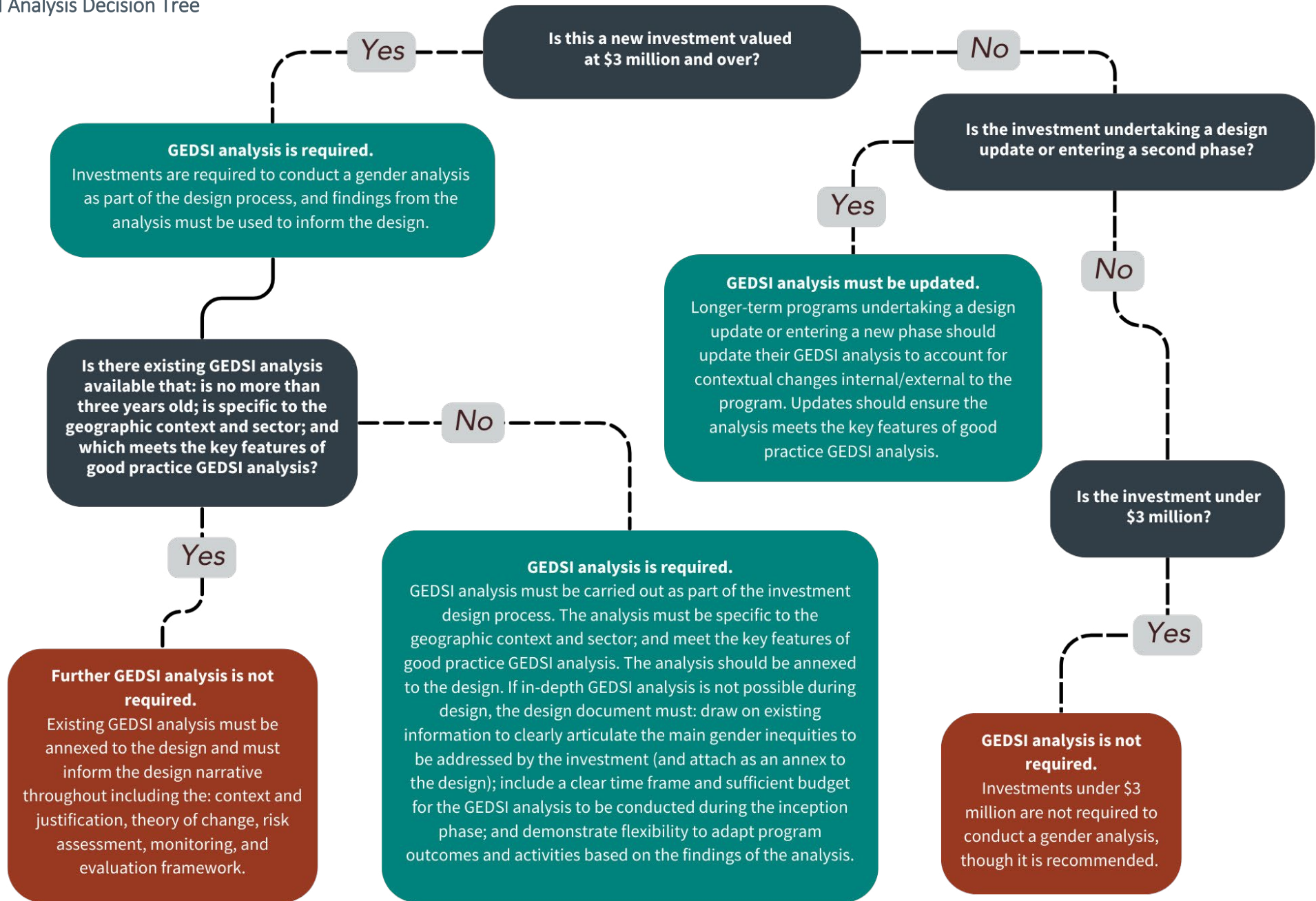
Over time social norms, relations, and power dynamics change. Events such as a pandemics, conflict or economic crises can cause gender roles to change rapidly or dramatically. As such, longer-term programs undertaking a design update or entering a new phase should review and update their GEDSI analysis to identify whether adjustments in implementation approaches are needed.

GEDSI analysis can draw on either secondary data sources (e.g., existing gender analyses and published research and data) or both primary (e.g. key informant interviews, focus group discussions, surveys) and secondary data sources. While quality analysis should use both secondary and primary sources, secondary research is sufficient where existing analysis is: less than three years old; takes an intersectional approach; and explores norms, relations and power dynamics within the relevant geographic context *and* sector. In cases where directly relevant and current GEDSI analysis exists, this can be annexed to the design. However, if secondary data is limited, is older than three years, or was undertaken in a different geographic context or sector, primary research is required to enable informed program design.

While [humanitarian and disaster assistance investments of less than 12 months duration are exempt from the design GEDSI analysis requirement](#), GEDSI analysis is required for humanitarian investments of more than 12 months.

The decision tree below guides investment managers on the expected approach to GEDSI analysis.

GEDSI Analysis Decision Tree



STEP 2 – METHODOLOGY

Although the methodology depends on the scope of the analysis, the below principles ensure that all GEDSI analysis is high quality, evidence-based and sufficiently comprehensive to inform investment design:



Makes visible the inequities and identifies opportunities to transform power imbalances.

Good GEDSI analysis collects data that highlights how women, men, girls, boys, gender diverse people and people with disabilities negotiate the social norms, relations and power dynamics that influence their lives. It provides critical analysis across these areas, and highlights: where inequalities exist between different social groups; why these disparities exist; potential barriers for different social groups in benefitting from the investment and; potential solutions to these issues.



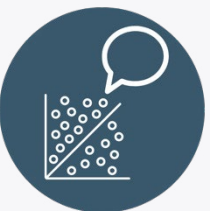
Takes a 'do no harm' approach.

Good GEDSI analysis takes a 'do no harm' approach and considers the impact (intended and unintended) an investment could have on different social groups. Addressing marginalisation and stigma can generate backlash, which programs must be designed to manage. GEDSI analysis supports social safeguarding by providing an understanding of the specific harms and risks that different social groups are exposed to. Risks should consider gender-based violence, child protection risks, sexual exploitation and abuse, and human rights violations and comply with [DFAT's Prevention of Sexual Exploitation, Abuse and Harassment \(PSEAH\)](#) and [Environmental and Social Safeguard and Child Protection Policies](#).



Goes beyond women, men, girls and boys.

Good GEDSI analysis goes beyond a binary understanding of gender. It asks which men and which women (which girls and which boys) may face barriers in benefitting from an investment. It also includes gender diverse people and diverse categories of women, men, boys, girls based on other intersecting forms of discrimination. Good GEDSI analysis looks for differences between different social groups, seeks to understand these, and considers how the investment design should respond.



Combines quantitative and qualitative methods.

Good GEDSI analysis is based on two types of data: 1) quantitative sex, age and disability-disaggregated data, and 2) qualitative analytical information. Quantitative methods are best suited for generating information on measurable gaps and disparities between different groups of people, and for identifying patterns of inequality. Qualitative methods provide insight into how and why different groups of people have different experiences – and how these affect their capacity to participate in, influence, and benefit from program activities. Combining quantitative and qualitative methods enhances the validity and credibility of findings.



Uses participatory approaches.

Good GEDSI analysis requires that different social groups participate equally in the research. Participatory research methods are essential for engaging with groups directly to understand their needs and identify solutions for their participation in the investment. Participatory methods collect data that is relevant and accurate; it enables those targeted by an investment to share their experiences and provide recommendations for program strategies and activities. Good GEDSI analysis also engages 'hard-to-reach' groups. For example, some people with disabilities may be unable to leave their homes or may be purposely hidden due to social stigma, people with communication or intellectual disabilities may face challenges participating in surveys or focus group discussions.



Disaggregates data by sex, age and disability as a minimum and, where practicable, gender identity. Good GEDSI analysis presents sex, age and disability-disaggregated statistics. First, all analyses should disaggregate by sex as a minimum. However, there are instances where people do not identify with the male/female binary. For example, the Pacific has a number of indigenous alternative expressions of gender, such as fakaleitī (Tonga), fa'afafine (Samoa), vaka sa lewa lewa (Fiji) and pinapinaaine (Kiribati and Tuvalu).⁶

The collection of gender-disaggregated data which enables GEDSI analysis participants to identify based on their gender allows for a dignified approach, but can raise concerns about privacy, identity, self-determination, and security. The appropriateness of collecting gender-disaggregated data therefore depends on the context – for example, the decision to initiate and continue gender-disaggregated data collection in countries where same-sex sexual conduct is criminalized or where laws and policies are used to discriminate against or persecute LGBTQIA+ persons, should be based on an assessment of threats and risks to the safety and rights of those involved in the activity. Consider the degree to which individuals requested to identify their gender may understand and/or react to diverse gender identities. GEDSI analysis must consider potential risks and ‘do-no-harm’ to those conducting and/or participating in the analysis. Safety and confidentiality should always be a primary concern.

In addition to sex and gender, disaggregation by age is also required. Disaggregation by three age brackets from childhood to adolescence (0-5; 6-12; 13-17) and 10-year age brackets thereafter is the internationally accepted standard.⁷ Depending on the type of program or investment, other age groups may be better suited for analysis – for example if designing a nutrition program for children, smaller intervals may be used for those younger than 5 years.

When collecting disability disaggregated data, the focus should be on people’s experience of their individual level of function, which better captures the relationship between their disability, the environment and barriers to participation and the enjoyment of rights. The [Washington Group Short Set \(WG-SS\) of Disability Questions](#) standardises the collection of disability disaggregated data and can be rapidly and easily deployed in a variety of settings.

Finally, when data on sex, gender, age or disability are not available, this should be identified as a gap and addressed as an opportunity through the investment monitoring, evaluation and learning system.

What about GEDSI analysis during humanitarian crises?

Humanitarian crises and emergencies affect women and men, girls and boys, gender-diverse people and people with disabilities differently. Pre-existing inequalities are often exacerbated in times of crisis and limit access to the resources and services. This is particularly true for those who experience intersecting and compounding marginalisation including women and girls with disabilities, and people of diverse sexual orientation and gender identity. Conducting GEDSI analysis during an emergency may be challenging, but is critical to inform targeted and effective emergency responses that do no harm.

Rapid gender analysis (RGA) is designed for emergency contexts. RGA provides essential information about roles and responsibilities, capacities and vulnerabilities of different groups of people, together with programming recommendations. It can be used in different sectors, include disability inclusion analysis, and can easily be incorporated into existing needs assessment tools and used to monitor and evaluate outcomes. RGAs can also be done progressively as more information becomes available.

[CARE’s Gender in Emergencies Guidance Note Preparing a Rapid Gender Analysis](#) and [the Interagency Standing Committee’s Gender Handbook for Humanitarian Action](#) provide step by step guidance on how to undertake an RGA. DFAT’s gender equality and disability teams can support with the RGA process.

⁶ Within the Pacific region, these terms refer to people assigned male at birth who live as women according to tradition – in such cases people who have non-heteronormative lifestyles are not always considered minorities.

⁷ IFRC (2018) *Minimum standards for protection, gender and inclusion in emergencies*. Geneva.

RESOURCES

For further information on GEDSI analysis tools see:

DFAT Ethical Research and Evaluation Guidance Note: Sets out requirements for ethical research and evaluation. It aligns with DFAT's policies on program management, conduct and risk management, and safeguarding policies.

ACFID and Research Development for Impact Network Principles and Guidelines for Ethical Research and Evaluation in Development: Provides practical support for the design, implementation and use of research, including GEDSI analysis. An essential resource to ensure research activities 'do no harm.'

Government of Canada Gender-Based Analysis Plus (GBA+): GBA+ assesses how diverse groups of people experience policies, programs and initiatives. The "plus" in GBA+ acknowledges that GBA goes beyond biological (sex) and socio-cultural (gender) differences.

DFAT and Asian Development Bank Tool Kit on Gender Equality Results and Indicators: Presents a menu of gender equality outcomes, results, and indicators, focusing on the sectors and strategic priorities of the Asian Development Bank (ADB) and Australia's development program.

CBM International Disability and Gender Analysis toolkit: Provides tools for programs to assess knowledge, attitudes and practice to inform situation analysis and design, to create baseline data and/or to improve monitoring, evaluation, accountability and learning.

Humanity and Inclusion's Policy on Disability, Gender and Age: Includes a Quality Framework for programming moving from 'unaware' to 'aware/sensitive' to 'responsive' through to 'transformative'.

UN Partnership on the Rights of Persons with Disabilities Guidance for Conducting a Situational Country Analysis of the Rights of Persons with Disabilities: Sets out a framework for analysing the pre-conditions to disability inclusion, level of participation, inclusion of marginalised and under-represented groups, and the rights of women and girls with disabilities.

STEP 3 - ANALYSIS

GEDSI analysis data can be analysed using standard quantitative and qualitative analytical methods and systems. What distinguishes good GEDSI analysis is that it is specific to the proposed investment.

Data analysis should compare information about women, men, girls, boys and gender diverse people, and compare different groups of women, men, girls, boys and gender diverse people (e.g., age, disability, income, education, faith, race, ethnicity and sexuality). These comparisons will reveal where there are inequalities that the investment needs to respond to.

The analysis should also provide an understanding of why these gaps and disparities exist and how they affect the opportunities and aspirations of different social groups. It should reveal the strengths of different social groups, and where social norms change is already occurring. Taking a strengths-based approach enables the identification of opportunities and entry points that the program can leverage to transform harmful gender and social norms.

Findings from the analytical process should be used to: ensure that the investment does no harm; identify priority areas of action in the design; and enhance the effectiveness and sustainability of overall program outcomes.

STEP 4 – ACTION

GEDSI analysis is only useful if it provides clear recommendations to inform the investment. Good GEDSI analysis recommendations should build on existing strengths, identify opportunities and entry points, and propose realistic activities and approaches that can be feasibly implemented as part of the investment. Recommendations should identify actions and opportunities to affect positive change that advances gender equality, and disability and social inclusion.

As part of developing recommendations, consider the following questions⁸:

- Have any issues been identified that will impact the ability of the investment to achieve its end-of-program outcomes or intermediate outcomes?
 - › If yes, do these issues require that the end-of-investment outcomes or intermediate outcomes be re-phrased or reconceptualised?
- Have any issues been identified that will prevent some social groups from participating in and benefitting equally from the program?
 - › If yes, how can the program be amended to ensure that these groups benefit equally?
- What points of entry and opportunities exist for engaging marginalised groups of women, girls, gender diverse peoples, or people with disabilities through the investment?
- Are the needs of any groups of people in relation to this program different enough that a separate program component focusing on that sub-group needs to be created?
- What types of data must be collected to track the impacts of the program on women, girls, gender diverse people, people with disabilities and any other social group?
- Have any potential unintended negative consequences of the investment on different social groups been identified?
 - › If yes, following the ‘do no harm’ principle, how can these risks be mitigated against and monitored?
- Has partner capacity been assessed, and what gaps and needs have been identified by partner agencies themselves to implement the actions needed to achieve GEDSI outcomes?

GEDSI analysis should be visible throughout investment design documentation – starting from understanding of the development issue to be addresses, specification of the target group, and design of the investment objective, outcomes, outputs, activities, indicators and budget. See the [Gender Equality in Investment Design Good Practice Note](#), and the [Gender Equality in Monitoring and Evaluation and Reporting Good Practice Note](#) for further guidance.

⁸ Adapted from USAID. (2010) *Tips for Conducting a Gender Analysis at the project-level*. Washington DC.