Toolkit

Developing your GCRF Gender Equality Statement

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Contents

About genderED ................................................................. 1
Guidance on the GCRF gender equality statement ........................................... 2
  Introduction ........................................................................................................... 2
  Background .......................................................................................................... 2
  Why is gender equality relevant to GCRF research ............................................. 3
  Case study: causal links between poverty and gender inequality - climate change impacts in Mozambique ......... 3
  Integrating gender equality considerations into your GCRF project ...................... 3
  Case study: the benefits of gender responsive research design ............................... 4

Four steps to completing your GE Statement ......................................................... 4
  Step 1: Gender equality in your project’s conceptualisation ................................... 4
  Step 2: Equal and meaningful opportunities for people of all genders to participate in the project .................. 6
  Step 3: Gender in impact and dissemination ............................................................ 7
  Step 4: Monitoring risks .......................................................................................... 9

About genderED

This guidance was produced as part of genderED project for the University of Edinburgh.

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genderED is the University of Edinburgh’s interdisciplinary hub for gender and sexualities studies. For more information gendered ed ac uk genderED

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Guidance on the GCRF gender equality statement

Introduction

GCRF projects draw higher education (HE) researchers into the international development (ID) arena, demanding that PIs and their teams tackle social and ethical issues involved in international development.

The University of Edinburgh recognises that this requires institutional and individual learning.

Since 2019, UKRI has required a compulsory Gender Equality (GE) Statement in all GCRF applications (see box). This guidance provides advice to PIs on completing a sufficient response to this requirement in the GCRF application process. It is closely tailored to the GE Statement’s structure and should be read in conjunction with Edinburgh University’s general guidance: ‘Writing a GCRF Proposal’, ‘Guidance on Theory of Change’, and ‘Guidance on Ethical Sustainable Partnership Working.’ This guide should not be considered a general guide to gender sensitivity in development research projects.

The 5 Criteria of UKRI Gender Equality Statement.

All applications need to demonstrate meaningful yet proportionate consideration as to how the proposal will contribute to reducing gender inequalities as required under the International Development (Gender Equality) Act 2014. Through:

Criterion 1. Ensuring equal and meaningful opportunities for people (researchers, participants and beneficiaries) of different genders to be involved throughout the project.

Criterion 2: Addressing the expected impact of the project (benefits and losses) on people of different genders.

Criterion 3: Addressing the impact on the relations between people of different genders.

Criterion 4: Avoiding, and developing strategies to mitigate and monitor risks and unintended consequences on gender.

Criterion 5: Measuring relevant outcomes and outputs, with data disaggregated by age and gender.

This guidance below provides steps, which help you ensure you have fulfilled each of these criteria.

Background

As the GCRF is funded through the Official Development Assistance budget, its main objective is the promotion of the economic development and welfare of developing countries, to achieve the Sustainable Development Goals (SDGs). As a result, project teams are strongly encouraged to take account of local context and the GCRF’s commitments to human rights, good governance and social justice when developing research projects. For this reason, the GCRF strategy emphasises interdisciplinary approaches that incorporate the skills of social scientists to undertake this kind of analysis.

An important aspect of the SDGs is their commitment to ‘leaving no one behind’. For this reason development frameworks emphasise the role that social inequalities - with a specific emphasis on gender inequalities - play in the maintenance of poverty. Commitment to gender equality is ‘mainstreamed’ into all of the 17 SDGs (UN Women, 2018) and is enforced in UK development actions through the 2014 International Development (Gender Equality) Act. This forms the normative and legal frameworks underpinning the GCRF’s mandatory GE Statement.

Gender - Gender is a social scientific term used to describe shared social ideals of femininity and masculinity, associated behavioural expectations and relations between the sexes. These shared ideas vary across time and place, and between cultures. They are reproduced in individuals (e.g. gender identity), institutions and wider society. The two most common gender identities are ‘man’ and ‘woman’. Transgender and non-binary gender identities are however becoming increasingly common. We use ‘people of all genders’ as an inclusive term, in keeping with UKRI language.

Sex - Sex is biologically determined and refers to reproductive organs and characteristics. Male and female are the most common sexes and small proportion of the population, have intersex characteristics.

Intersectionality: intersectionality is a social scientific term used to draw attention to the ways that different identity markers (such as race, caste, disability, age, migration status, or sexuality) intersect with one another to structure privileges and disadvantages.

1 Further guidance, supporting excellence in gender sensitive research planning and implementation is being considered under the University of Edinburgh’s SFC GCRF Strategic Plan. Please note that in accordance with the geographical priorities of Edinburgh’s SFC GCRF Strategic Plan, the examples used throughout this guidance note are focused in Sub-Saharan Africa.


3 Ibid.

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Why is gender equality relevant to GCRF research?

Worldwide women are over-represented amongst the very poorest, have lower levels of access to education and are more vulnerable to violence and the effects of environmental degradation associated with climate change. Extensive empirical evidence shows that if these gender specific experiences of poverty, violence and marginalisation are not tackled the SDGs will not be fulfilled (UN Women, 2018). Gender equality is a standalone goal as well as a key aspect of other SDGs. Commitments to ending gender inequality are also enshrined in international Human Rights frameworks such as the Convention on the Elimination of all Forms of Discrimination against Women (CEDAW).

Case study: causal links between poverty and gender inequality - climate change impacts in Mozambique

Mozambique is one of the most vulnerable countries in the world with respect to climate change and natural disasters. 60% of its population lives in extreme poverty and depend on natural resources. Climate change and natural disasters, along with poor governance and gender inequality form barriers to lasting poverty reduction. The poorest in society are most vulnerable to harmful climate change impacts, whilst their ability to adapt is severely constrained by the same poverty. Care International argue “Entire segments of the population [are] trapped in a vicious cycle of poverty that manifests itself through generally poor human development indicators, particularly high levels of food and nutritional insecurity and the use of damaging, high risk coping strategies”(Care International, 2014, p. 16).

Land and property right systems in Mozambique mean women have little ownership of land, even though 87% of the agricultural labour force is female. One in three households in Mozambique, is headed by a woman. These households are affected by extreme poverty, with 90% of them relying on subsistence agriculture. Violence against women is also widespread, with men culturally sanctioned to use violence to resolve disputes within the family. Women’s political participation is also very limited. It is also important to note that gender inequalities cannot be expected to resolve themselves with the passage of time: parts of Mozambique are becoming more gender unequal (Care International, 2014, p. 21).

These gender inequalities leave women particularly vulnerable to climate change, and the natural disasters it causes. Interventions seeking to target poverty and increase resilience and adaptation to climate change that do not take account of these gendered distributions of vulnerabilities will fail to affect these most vulnerable people. However, due to women’s marginalisation and lack of power in Mozambique, proactive activities are required to gather information from women about their needs and to provide interventions that assist them.

Source: Care International (2014) Gender-sensitive Climate Vulnerability and Capacity Analysis (GCVCA). This tool provides a detailed catalogue of actions that enable gender sensitive analysis and implementation throughout a project’s life cycle, starting with the conceptualisation of project’s aims.

Integrating gender equality considerations into your GCRF project

Numerous international development organisations provide sophisticated and detailed toolkits to ensure excellence in the integration of gender equality considerations into development-focused projects. They include recommendations on gender sensitive participatory methodologies, sex disaggregated data collection and analysis processes and gender sensitive problem analysis (see for example Feed the Future USAid, n.d.; Oxfam, 2019).

These toolkits share a commitment to a practice described by development practitioners as gender sensitive situational analysis whereby researchers gather information on local gender inequalities in partnership with local communities. These toolkits emphasise that researchers cannot reasonably assume that gender inequality is irrelevant or that their own cultural experiences of gender in/equality are relevant in Low and Middle Income Countries (LMICs).

Undertaking gender sensitive situational analysis prevents researchers from unwittingly exacerbating gender inequalities, for example, by developing agricultural technologies and only sharing them through dissemination pathways accessible to men; or designing early warning systems for disaster risk reduction that ignore gender differences in literacy. Projects making these kind of mistakes are referred to as ‘gender blind’ by development practitioners (see Figure 1.1 below).
Gender-blind | Gender (the differentiated and intersectional experiences of women, men, and gender diverse groups) is not considered in the research project; not even its conceptualisation or its rationale.
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Gender-aware | Gender is considered in the research project’s rationale, but is not an operative concept in the design and methodology.
Gender-sensitive | Gender is considered in the research project’s rationale, project design and methodology. Data is disaggregated by gender, and gender is also considered in the composition of the research team and reviewers. Gender-sensitive research does not (yet) extend to analysis and action to address gender inequalities.
Gender-responsive | Gender is considered in the research project’s rationale, design and methodology and is rigorously analysed with a view to inform implementation, communication, and influencing strategies. Gender-responsive research does not (yet) address the underlying structural factors such as norms and power relations that contribute to gender inequalities.
Gender-transformative | Examines analyses, and builds an evidence base to inform long-term practical changes in structural gender power relations and norms, roles and inequalities. Gender-transformative research should lead to sustained change through action (eg. partnerships, outreach, and interventions, particularly with women’s right organisations).

Figure 1.1: Oxfam Rubric for integrating Gender in Research Planning. (Oxfam, 2019, p. 2)

Case study: the benefits of gender responsive research design

A Stanford University collaboration between biomedical scientists and fluid mechanics engineers took account of inequalities in sexual freedoms in countries with a high prevalence of HIV. In many cultures women cannot refuse sex or insist on condom use by male partners. Medics need to take account of this, otherwise they risk designing ineffective public health interventions. Awareness of this led researchers to explore the development of microbicide gels, which women could use to protect themselves from the transmission of HIV during sexual intercourse. Taking full account of the gendered hierarchies at play in HIV transmission, which vary across cultures, in this instance led to the identification of different research aims – namely the development of anti-HIV technologies that women can use within the cultural constraints they face i.e. technologies that provide an alternative to condom use in cultures where women cannot insist on their use.4

Four steps to completing your GE Statement

It is helpful to consider the following four steps to work out the relevance of gender to your project and to enable you to complete UKRI’s mandatory GE Statement:

1. Gender in the conceptualisation of the research project
2. Equal and meaningful opportunities for people of all genders to participate in the project;
3. Gender in impact and dissemination;

It is common for Principal Investigators to feel most comfortable with the second requirement. However, the first step is the most important.

Step 1: Gender equality in your project’s conceptualisation

Thinking about your project’s core aims (e.g. increased fire safety in shack settlements; higher yield livestock management practices; cooler cities) ask yourself the following four questions:

- **What is the current state of knowledge on gender issues related to your research theme?**
- **Decision-making.** Are women and men, and where relevant trans and non-binary people, equally represented in decision-making related to your project’s goals and themes in LMIC countries? (e.g. in urban planning decision making structures; local/national agriculture systems; health care planning; disaster relief, as appropriate. Do social attitudes, vulnerability to violence or discrimination limit access to these arenas?). N.B this question explicitly refers to communities/populations in LMIC countries who will be affected by your

4 For further details see Gendered Innovations, University of Stanford.

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project’s outputs or outcomes. It does not refer to decision-making in your research team – equal participation on your research team is addressed separately, below.

- **Access to resources.** Do women and men, and where relevant transgender and non-binary people have equal access to resources related to this theme? (e.g. If your work focuses on agriculture, energy or health - do women, men and where relevant trans and non-binary people have equal ownership of and access to livestock/land/equipment and training/energy/food/healthcare?).

- **Division of labour.** Do women and men, and where relevant transgender and non-binary people, perform the same labour in relation to the social/economic/political theme of your research? Are different social groups performing, or assumed to perform, distinctive tasks and responsibilities? Are they performed in different spheres or locations (domestic/private or public)?

**Actions:** to answer these questions it may be necessary to:

- approach local community/civil society partner organisations for input in project development (e.g. women’s civil society representatives; development NGOs specialising in your project’s thematic area);
- undertake a literature review of NGO or academic reports on gender equality issues relevant to your project’s theme during proposal development;
- consider participatory measures or literature review during your project’s inception;
- approach a gender and development specialist with expertise in your thematic area to join the project team at the beginning of your proposal development.

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**Example: gender sensitive situational analysis**

A project examining fire safety in refugee camps undertook a literature review and consulted with local community groups and women’s civil society organisations to develop a gender sensitive situational analysis focused on: decision making; access to resources; and division of labour. These processes identified that:

- high levels of violence and lack of safety in temporary refugee camps prevented women from freely participating in decision making in public spaces.
- fire was weaponised against women in an explicitly gendered way, and used in some communities against individuals identified as LGBTQI.
- gender differences in literacy affected women’s access to knowledge and information.
- women undertook a greater share of domestic care work including food preparation activities, meaning that any adjustments to fuel or stoves (a key fire risk) should be taken with explicit reference to women’s experiences and needs.
- that women are more likely to be injured during fires trying to assist or rescue children or infirm family members.

**To respond** to this analysis the project team developed methods to ensure that women’s voices were meaningfully included in project development processes (criterion 1 of the GE statement), through surveys and focus groups. This meant that the project team could understand and address the role of gendered divisions of labour in fire safety and barriers to women’s access to knowledge generated from the project. This analysis also enabled the team to describe expected gender impacts of the project (criteria 3 and 4), for example, highlighting that increased fire safety could potentially reduce fears amongst the LGBTQI populations and women. Increased fire safety in homes also had a potentially positive impact on women decreasing their likelihood of injury in fires. The project team also identified gendered asymmetries in access to information about fire safety as a potential unintended negative consequence on gender equality (criterion 5 of the GE Statement) and sought collaboration with local women’s NGOs to overcome this.

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Relevance to the five criteria of the GE Statement. Considering gender in your project’s conceptualisation should enable you to:

- identify the local relevance of gender inequality in your project’s aims, and in turn identify;
- any barriers to equal and meaningful opportunities for participation of people of all genders (Criterion 1);
- how the project might impact (benefit and losses) on people of different genders; and the relationships between them for example in households, economy, society etc (Criteria 2 and 3); and identify potential risks to gender equality, including unintended impacts and the types of outcomes and outputs you should be capturing (Criteria 4 and 5).

Step 2: Equal and meaningful opportunities for people of all genders to participate in the project

Your analysis of women and men’s participation in decision-making in Step 1, should have provided the relevant information with regard to LMIC countries your project is working in and their communities. Step 2 focuses on participation in Research Institutes and scientific teams. Participation in scientific research in the Global North and the Global South is marked by horizontal and vertical gender segregation\(^6\) (UNESCO, 2018). These patterns vary significantly between countries. To promote equal and meaningful opportunities for participation in partner research institutes ask yourself the following five questions:

- To what extent are women and men, and where relevant transgender and non-binary people, involved in the planning, design and evaluation of research within each research partner organisations, especially LMIC partners?
- What hinders an increase in the participation of women and men, and where relevant transgender and non-binary people, within the organisation/university? For example, do working conditions (e.g. working hours, fieldwork organisation) accommodate women equally? This could also include factors outside your control – such as social attitudes, or gender specific safety concerns.
- How does the organization handle staff safety and gender-based violence on their premises? Can staff report if they have been victims of sexual harassment or other types of discrimination? Is there a mechanism to meaningfully respond to these reports?
- What risks to gender equality do the above factors present? For example, could discrimination or violence on campus mean that LGBT people or women cannot easily participate on your research team, or advance professionally? Could lack of access to child-care facilities prevent people with caring responsibilities being able to travel to conferences or attend meetings? See also the box below for examples.
- What concrete plans do research partner organisations, particularly in LMICs, have to tackle problems or barriers identified in the proceeding questions?

Actions: to respond to these queries it may be necessary to:

- discuss relevant institutional or national gender equality policies in place in your own, and UK/LMIC partner institutions;
- consult local LMIC women in STEM or discipline specific gender equality promoters in LMIC countries (e.g. African Women in Agricultural Research and Development; relevant local UNESCO\(^7\) field office; The African Gender Institute; African Academy of Sciences; African Research Intensive Universities Alliance) to discuss relevant barriers to equal participation and measures that would help;
- incorporate mutual commitments to gender equality into partnership agreements and memorandums of understanding with partners.
- consider methods, actions or technologies that could be used to increase under-represented genders’ participation in research and decision-making? This could include, for example, positive action measures such as mentoring to support female researchers, taking social constraints into consideration with responses such as facilitating female-only fieldwork teams, or discussing LGBTQI safety specific security measures with research partners.\(^8\)

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\(^6\) I.e. women are clustered in particular disciplines, such as social science or particular health related disciplines (horizontal segregation) and are under represented in the highest levels of research and decision making (vertical segregation).  
\(^7\) UNESCO is very active in the promotion of gender equality in education. Its’ local offices may therefore be helpful starting points for locally relevant contacts.  
\(^8\) These questions are adapted from Questions to Integrate a Gender Perspective into Research Cooperation, Swedish International Development Agency 2016 and The Garcia Tool kit 2019.
Relevance to the five criteria of the GE Statement: Following the process should enable you to:

- identify relevant barriers to equal and meaningful participation in partner research institutes (Criterion 1)
- devise measures to promote equal and meaningful participation in your project within research institutes and scientific teams (Criterion 1).

Example – Ensuring meaningful participation for people of all genders in research institutes

Literature shows that in common with many STEM discipines, agricultural research is characterised by a ‘leaky pipe line’ where by the participation of women dwindles toward the top of the profession (Beintema & Di Marcantonio, 2010). In a GCRF project with 5 LMIC partners, patterns of gender segregation varied highly. In one country, women’s participation in fieldwork was significantly hindered by safety concerns and gossip about women traveling with white male colleagues from the Global North. Only one of the LMIC partner institutions had any gender equality or sexual harassment policies. To respond to these issues and facilitate women’s participation on the project, the PI committed to organising a proportion of fieldwork trips in female only teams and took local advice on measures to ensure security. One PhD studentship, was reserved for female candidates from LMIC countries. This was backed with mentoring from a team participant at the University of Edinburgh and in an LMIC country. Edinburgh University’s funds to pay for childcare during conference visits were made available to female LMIC researchers so they could travel to professional conferences. Encouragements to devise gender equality and sexual harassment policies were written into all partnership agreements and memorandums of understanding. Although these were not enforceable, these functioned as an initial, awareness raising measure.

Step 3: Gender in impact and dissemination

UKRI provides guidance on writing a pathways to impact statement9 and the University of Edinburgh’s Theory of Change Guidance, provides guidance on building a theory of change. These documents detail the differences between Results; Impact; Outcomes; Outputs and Activities. Many of the projects funded by GCRF at an institution like the University of Edinburgh are fundamental scientific projects, which have quite a distant relationship to communities. The Theory of Change Guidance cautions against unrealistic impact claims and argues primarily for a coherent narrative that connects your activities to the desired development change, through a logical sequence of intermediate results. Whether these are called ‘outputs’ or ‘outcomes’ will often depend on the specifics of your project.

<table>
<thead>
<tr>
<th>Results</th>
<th>a generic term to indicate the outputs, outcomes or impact of your intervention.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact</td>
<td>the ultimate development change to which your intervention will contribute.</td>
</tr>
<tr>
<td>Outcomes</td>
<td>all the intermediate development changes to which your intervention will contribute,</td>
</tr>
<tr>
<td></td>
<td>and that, combined, will enable impact to emerge.</td>
</tr>
<tr>
<td>Outputs</td>
<td>the immediate results of your activities – these can be products, services, or short-term</td>
</tr>
<tr>
<td></td>
<td>changes that will contribute to bring about outcomes.</td>
</tr>
<tr>
<td>Activities</td>
<td>the things you will actually do in your interventions.20</td>
</tr>
</tbody>
</table>

It can also be helpful to think about four ‘levels’ of impact targets: the International development community; national policy makers and NGOs; communities; and individuals.

Your reflections on the questions covered in Step 1 should have helped you identify any relevant gender inequalities that your project might affect and how. This should enable you to incorporate a gender sensitive description of the projected results, impacts and outcomes that your project will generate, into your pathways to impact statement.

9 UKRI guidance on writing a pathways to impact

10 Source: University of Edinburgh Using a Theory of Change Guidance.

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Identification of any relevant differences in access to decision making should shape your dissemination plans. Towards the end of your project, or after it has finished, you may wish to consider Impact Accelerator activities to translate your project’s outputs and results into accessible formats or to target appropriate communities in effective ways.

Questions to consider

- What gender inequalities will your project ultimately impact upon? (See also your responses to Step 1).
- How will your project’s outcomes affect these gender inequalities? (See also your responses to Step 1).
- What risks could affect the likelihood of your project delivering positive impacts on gender equality (where relevant)?
- How will you encourage equal access to your project’s knowledge outputs for women and men, and where relevant trans and non-binary people? (See also your responses to Step 2 in this guide).
- What outcomes and outputs could you measure with data disaggregated by age and gender.11 What would be meaningful but proportionate?

N.B. the elaboration of new knowledge or theoretical frameworks that incorporate an understanding of gender inequalities and their relevance into academic, practical, political, technological perspectives, could in many instances be a key project impact, if you have sought to thoroughly incorporate gendered analysis into your project.

Actions: to respond to these queries it may be necessary to:

- ✓ Consult women’s community groups or civil society organisations for insights into the best methods and channels to ensure that women benefit directly from research findings.12
- ✓ Consult community NGOs for insights into the best methods to ensure equal benefit for different religious or ethnic groups, thereby targeting, for example, differently positioned men where relevant, women from different religious or ethnic groups, and trans and non-binary people, where relevant.
- ✓ Consult women’s community groups or civil society organisations, and community NGOs, to solicit their views on meaningful measures of outcomes and outputs.
- ✓ Decide on any relevant measures of outputs or outcomes using data disaggregated by age and gender.

Relevance to the five criteria of the GE Statement. Your answers to these questions and the actions you devise, will help you explain:

- The expected impact of the project (benefits and losses) on people of different genders, both throughout the project and beyond (Criteria 2 and 3).
- Whether any relevant outcomes and outputs are being measured, with data disaggregated by age and gender (where disclosed) (Criterion 5).

Example – Gender equality in impact and dissemination

An interdisciplinary project on disaster risk reduction (DDR) elaborated a multi level impact strategy disseminating results to the international development community; national/local government and communities. Results included new interdisciplinary knowledge on disaster risk reduction that examined relationships between hazards (e.g. landslide and flood). Assessment of gendered differences in vulnerabilities to disaster risks was incorporated into this knowledge. The project’s thorough gender sensitive situational analysis had revealed specific risk factors for women and girls, so the team sought to build these gender differentiated vulnerabilities into their models to calculate risk and policy recommendations. The project’s predicted impacts therefore include, the production of gender sensitive modelling techniques, ultimately leading to better disaster risk reduction strategies and increased safety for women. Outcomes included empowered communities through data collection - activities were undertaken by Citizen Scientists who were involved in data collection. These teams were gender balanced, ensuring women benefited equally from direct knowledge and empowerment gains. Dissemination activities included single-sex meetings held at women’s civil society organisations, in response to feedback from local gender equality NGOs.

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11 UKIR’s statement emphasizes that responses should be meaningful yet proportionate, PIs and research teams should devise se

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Step 4: Monitoring risks

Your completion of Step 1 and Step 2 should have helped you identify any risks to gender equality associated with your project. This final step helps you ensure that you can fully complete Criterion 4 of the GE Statement which asks you to monitor any risks to gender equality in your project (identified in Step 1, Step 2 in this guide) and to describe any data you will collect to monitor these risks; and Criterion 5 which asks you to measure any relevant outcomes and outputs with data disaggregated by age and gender.

Questions to consider:

- Reviewing your situational analysis in Step 1, what actions could you take to mitigate any relevant risks to gender equality including unintended consequences, which you identified?
- Reviewing your reflection on equal participation throughout the project in Step 2 what actions could you take to mitigate any relevant risks to gender equality including unintended consequences, which you identified?
- Reviewing your impact and dissemination plans in Step 3, what actions could you take to mitigate any relevant risks to gender equality including unintended consequences, which you identified?
- What data could you collect during your project to monitor these risks?

Actions: Based on your reflections you could:

- choose qualitative or quantitative indicators to measure relevant outcomes or outputs – these commitments should be proportionate and appropriate for your project;
- collect disaggregated data to measure participation (within the research and as you disseminate any findings from your research) these commitments should be proportionate and appropriate for your project.

Relevance to the five criteria of the GE Statement: Following this process should enable you to explain how you will:

- monitoring meaningful participation of people of different genders throughout the project (Criterion 1);
- how you will evidence the expected impact of the project on people (and between people) of different genders (Criteria 2 and 3) in a manner that is meaningful and proportionate;
- mitigate risks to gender equality and monitor any risks and unintended negative consequences to gender equality (Criterion 4);
- measure any relevant outcomes and outputs, with data disaggregated by age and gender (Criterion 5);

Example – Monitoring gender equality outcomes and risks

A 5-year project on the development of environmental governance frameworks devised an impact-monitoring framework that included two interesting measures of impacts on gender equality. The team monitored the presence or absence of meaningful acknowledgements of women’s roles, interests and economic contributions in 1) legislative proposals or court cases; 2) advocacy or litigation initiatives, that the team had influenced

The project’s gender sensitive situational analysis, undertaken during proposal development processes noted that the economic contributions of women are often underestimated or ignored and that women’s needs and interests are largely unknown and infrequently mentioned in existing, mainstream, academic studies. The project therefore risked duplicating this erasure of women’s roles, interests and economic contributions.

To respond and ensure that this negative impact would not occur in their project, the research team held focus groups with women in local communities discussing their roles, interests and economic contributions, gathering meaningful qualitative data on the immediate and potential gender impacts of the project. The team also gathered quantitative data on participation of women at community dissemination events and on participation in research teams including citizen scientist teams.
References


