

# CHAPTER FOUR GENDER PLANNING CONCEPTS



This chapter provides information on the conceptual frameworks that inform gender analysis and planning that are commonly used throughout the planning cycle of projects and programmes. This will form the basis for a subsequent focus on key gender planning concepts, the basis of which guides planning for development and ultimately for the achievement of equal opportunities and benefits for women, men, boys and girls.

The conceptual frameworks are useful in that they provide the lens for identifying the pertinent information and categorise it for purposes of analysis. This is critical in understanding complex situations as well as planning and evaluating the implications of initiatives and interventions for women and men, as well as their impact. Depending on the design of the framework, some are more relevant in certain contexts, for example community level planning, or emergency response, whilst others use more participatory techniques for gathering information.

To stimulate critical thinking on the gender planning concepts, these are discussed using a case study titled “Community Empowerment - Gauging Community Needs and Expectations”. The concepts are:

- Practical and strategic gender needs.
- Women in Development (WID) versus Gender and Development (GAD).
- Gender mainstreaming.
- Gender responsiveness.

The discussion of the concepts is accompanied by other exercises, definitions and fact sheets to reinforce their understanding. Additional resources are provided at the end of the chapter.

### Frameworks for gender analysis and planning

Any routine social and institutional appraisal processes must be informed by a gender analysis. A gender analysis is ‘the systematic attempt to identify key issues contributing to gender inequalities so that they can be properly addressed’<sup>20</sup>. It is essentially ‘the study of differences in conditions, needs, participation, rates, access to resources and development, control of assets, decision making powers, e.t.c between women and men in their assigned roles’<sup>21</sup>.

Key in conducting a gender analysis is the information it will provide to planners and decision makers as to whether or not specific measures are required for men or women, in addition to mainstreaming activities. For example, a gender analysis of poverty and development reveals women are poorer than men in the SADC region, due to the various causes; thus whilst interventions may still focus on increasing poor women and men’s participation in the economy, some women specific empowerment intervention is required to redress the critical imbalance.

Gender analysis is not restricted to a particular level of development interaction, it should be ‘from the ground up’, meaning from communities, to governance and service delivery structures, to the highest political structures. Thus, in the example above, a comprehensive analysis will be conducted at household level, community, including governance structures e.t.c, legal frameworks that play a role in access to rights and opportunities, and policy.

In order to conduct a gender analysis, sex disaggregated data and qualitative information is required (to be discussed in this chapter), and gender analysis must be at the beginning point of a planning process, and conducted at critical decision making stages of any process. For example, in a poverty reduction intervention,

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<sup>20</sup> European Communities (2004:14) *Toolkit on Mainstreaming Gender Equality in EC Development Cooperation*

<sup>21</sup> Ibid

once the gender, poverty and development picture is clear and the next stages include policy development as well as a poverty reduction framework, a gender analysis of the likely impact of the policy and the poverty reduction framework must be done. Having a good idea of the gender, poverty and development picture on the ground does not necessarily translate into a gender sensitive policy and resulting strategy to implement it.

Below are some of the widely used frameworks for gender analysis, which is the basis for effective gender planning for development.

**Table 4: Summary of gender analysis frameworks**

Framework and elements	Strengths	Weaknesses
<b>Moser Framework of Gender Planning</b> <ul style="list-style-type: none"> <li>• Triple role.</li> <li>• Strategic and practical needs.</li> <li>• Policy approaches.</li> </ul>	<ul style="list-style-type: none"> <li>• Regarded as simple to use.</li> <li>• Can be used at all levels.</li> <li>• Elements used for awareness raising as well as planning.</li> <li>• Challenges inequalities.</li> <li>• Captures all of women's work.</li> <li>• Uses the concept of strategic needs to change gender relations.</li> <li>• Examines policy assumptions.</li> </ul>	<ul style="list-style-type: none"> <li>• 'Needs' language can make planning top-down, beneficiaries seem passive.</li> <li>• Triple role, practical and strategic distinctions not always clear.</li> <li>• Leads to separate pictures of women and men.</li> <li>• Change over time not included.</li> </ul>
<b>Havard Gender Analysis Framework</b> <ul style="list-style-type: none"> <li>• Activities profile</li> <li>• Access and control of resources and benefits</li> <li>• Influencing factors</li> <li>• Checklist</li> </ul>	<ul style="list-style-type: none"> <li>• Practical and hands on.</li> <li>• Good for data collections.</li> <li>• Best at project level as it requires a micro level analysis and detailed information.</li> <li>• Clear picture of division of labour - makes women's work visible</li> <li>• Uncontroversial as based on facts, thus good entry point for planners.</li> </ul>	<ul style="list-style-type: none"> <li>• Does not address gender relations of power.</li> <li>• Leads to separate pictures of women and men.</li> <li>• Can lead to top-down, superficial information if not used in a participatory way</li> <li>• Change over time not included.</li> </ul>
<b>Longwe Empowerment Framework</b> <ul style="list-style-type: none"> <li>• Five rising levels of equality (welfare, access, conscientisation, participation, control)</li> <li>• Levels of recognition of women's issues (negative, neutral, positive)</li> </ul>	<ul style="list-style-type: none"> <li>• Use at all stages of the project cycle to look at transformatory potential of interventions.</li> <li>• Focuses on empowerment and equality as goals.</li> <li>• Enables analysis of levels of women's empowerment.</li> <li>• Useful as a toolkit of concepts.</li> <li>• Sees practical to strategic needs as a progression rather than discrete categories.</li> </ul>	<ul style="list-style-type: none"> <li>• Deals in broad generalities only.</li> <li>• Hierarchy of levels of empowerment does not include types of resources and their relative importance.</li> <li>• Gender relations seen only in terms of equality, leaves out other complex aspects.</li> <li>• Empowerment focus can lead to women-only focus.</li> <li>• Change over time not included.</li> <li>• Complicated to use.</li> </ul>
<b>IDS Social Relations Framework</b> <ul style="list-style-type: none"> <li>• Social relations.</li> <li>• Institutions (state, market, community, family/kinship).</li> <li>• Structural cause analysis.</li> </ul>	<ul style="list-style-type: none"> <li>• Use at all levels, for policy and planning.</li> <li>• Focus on institutions means organisations must examine themselves.</li> <li>• Holistic poverty analysis through taking into account cross cutting inequalities e.g race, class.</li> <li>• Highlights gender relations.</li> <li>• Shows change over time.</li> </ul>	<ul style="list-style-type: none"> <li>• Gender can get lost in other categories of analysis.</li> <li>• Unsuitable for participatory community level use.</li> <li>• Focus on institutions downplays individual agency.</li> <li>• May be hard to agree on clear definition of institution.</li> </ul>

Source: Commonwealth Secretariat and Commonwealth of Learning (2004) *The GMS Toolkit (Trainer's Guide 4 Key Concepts)*



## Notes

In terms of an analytical framework, the activities profile outlined in the Harvard gender framework analysis, provides clarity on who does what, and is used widely. It is useful in that information is gathered on which resources women and use of their activities, and their relationship to those resources, for example, user or ownership rights to land. This analysis is used to assess products of these resources, development inputs or project benefits. This allows institutions, organisations and project/programme implementers to assess whether women and men benefit equally from initiatives as well as from systems of resource allocation within the gender division of labour (to be discussed in this chapter). An analysis of influencing factors as articulated in the Harvard framework examine certain external and internal events and social issues that impact on women and men, their activities as well as patterns of resource use. This also provides direction in assessing the impact of projects and results of initiatives.

## Key Gender Planning Concepts



### *Case Study 1- Gauging community needs and expectations*

Donors have created a Millennium Development Goal (MDG) fund targeting rural communities in SADC member states. The initial funding is for a three year period and must be able to demonstrate tangible impact during that time if it is to be renewed. Among the criteria to be satisfied to secure funds is MDG goal three - how the programme will advance gender equality.

The ministries responsible in respective countries have been consulting with different stakeholders in some of poor rural communities, some with high HIV and AIDS infection rates, so that their needs can be taken into account when programmes are designed.

In Community X, the main decision-making structure is a local council in which women constitute 25% of councillors; the chairperson is a man; and the secretary is a woman. The chief (a man) is automatically represented in the council. The council is to present a final set of recommendations to the minister.

Some women feel that the money should be spent in helping them to acquire title to land and gaining access to credit for agricultural inputs. They would also like help from government with care work they are doing for sick relatives living with AIDS. Others women feel that the money should be spent on starting sewing and knitting clubs in order to generate immediate income to pay school fees following the introduction of fees for boys and girls at secondary school level. As a result of many young women dropping out of school due to pregnancy, they also want a policy to be introduced at schools allowing young women who fall pregnant to continue with their education and the young men responsible to be obliged to assume their parental responsibilities.

These women also want sex, HIV and AIDS education to be introduced in schools and in the community, with a particular emphasis on involving men who are generally averse to any discussion of condoms. As the majority of the men do not know their HIV status and have not gone for ARV treatment, adding to the risks of spreading HIV as well as the burden of home based care, the women would like VCT facilities to target men in the community. Some suggest that part of the funding be used for female condoms as a large number of women are becoming infected by HIV within marital relationships in which they are faithful but their husbands are not.

Men in the communities have indicated that their priority is to get better roads and communications, so that they can market their agricultural produce. They also want to start a fisheries project at a nearby dam. Traditionally only men in the community go fishing. Research has shown that most income from agricultural produce accrues to men, even though women do most of the work. Men in the community have signalled their resistance to any efforts that might be made to ensure that women gain title to land as part of the proposed programmes. They are opposed to any of the money being spent on reproductive health or HIV-related interventions and do not see why women should be remunerated for caring for the sick as this is a role they have traditionally played.

**Questions: Practical and strategic gender needs**

1. Which of the proposals in the case study presented do you think is likely to be put forward by the Council and which is not? Why?

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2. Which of the interventions in the case study serves the practical needs of women and which serves their strategic needs?

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3. What do you understand by practical and strategic gender needs?

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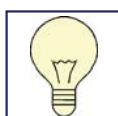
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**Table 5: Practical and strategic gender needs**

Practical needs	Strategic needs
Tend to be immediate and short term	Tend to be long term
Unique to particular women	Common to almost all women
Relate to daily needs, food, housing, income, health, children etc.	Relate to disadvantaged position, subordination, lack of resources and education, vulnerability to poverty and violence etc.
Easily identifiable by women	Basis of disadvantage and potential for change not always identifiable by women
Can be addressed by provision of specific inputs such as food, hand pumps, clinics etc.	Can be addressed by consciousness-raising, increasing self confidence, education, strengthening women's organisations, political mobilisation etc.
Addressing practical needs	Addressing strategic needs
Tends to involve women as beneficiaries and perhaps as participants	Involves women as agents or enables women to become agents
Can improve the condition of women's lives	Can improve the position of women in society
Generally does not alter traditional roles and relationships	Can empower women and transform relations

Source: A curriculum for the training of trainers in gender mainstreaming produced by African Women's Development and Communication Network



**Definitions**

The roles of women and men in society and institutions are generally different, and their needs vary accordingly.

**Practical needs** arise from the actual conditions women and men experience because of societal roles assigned to them. With regard to women, this often relates to them as mothers, homemakers and providers of basic needs, and is concerned with inadequacies in living and working conditions, such as food, water, shelter, income, health care, and employment. For poor women and men, practical needs are often associated with survival strategies. Whilst necessary, addressing only practical needs is a limited strategy and may ultimately serve to perpetuate the factors that keep women in particular in a disadvantaged position in society. It does not promote gender equality.

**Strategic needs** are the needs required to overcome the situation of subordination of women and men in society, and relate to their empowerment. They vary according to the particular social, economic and political context in which they are formulated. They are usually concerned with equality issues, for example, enabling women to have equal access to job opportunities and training, equal pay for work of equal value, rights to land and other capital assets, prevention of sexual harassment at work and addressing domestic violence. A focus on strategic needs entails a slow transformation of restrictive traditional customs and practices.

Adapted from: European Communities (2004) Toolkit on Mainstreaming Gender Equality in EC Development Cooperation

## Women and Development versus Gender and Development

4. Which of the interventions **in the case study**, if they were all to be accepted, might be described as a Women in Development (WID) approach and which might be described as a Gender and Development (GAD) approach?

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5. Why is this understanding important in development planning?

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**Table 6: WID versus GAD approaches**

Issue	WID	GAD
<i>The focus -</i>	Women	Relations between women and men
<i>The problem -</i>	The exclusion of women	Unequal relations that prevent equitable development and the full participation of women and men
<i>The goal -</i>	More efficient, effective development	Equitable development with women and men sharing decision making and power, opportunities and resources
<i>The solution -</i>	Integrate women into existing structures	Transform unequal relations and structures; empower the disadvantaged and women
<i>The strategies -</i>	Women only projects, increase women's productivity, income and ability to manage the household	Identify and address practical and strategic needs determined by women and men to improve their condition

*Adapted from: European Communities (2004) Toolkit on Mainstreaming Gender Equality in EC Development Cooperation  
European Communities (2005) EQUAL Guide on Gender Mainstreaming*



### Definitions

#### Women in Development (WID)

In the early 1970s, researchers began to focus on the division of labour based on sex, and the impact of development and modernization strategies on women. The WID concept came into use in this period, based on a philosophy that women are lagging behind in society and that the gap between women and men can be bridged by taking remedial action within the existing structures. The WID approach started to recognise women as direct actors of social, political, cultural and working life. Criticisms of the WID approach were to the effect that women's issues tended to be increasingly relegated to marginalized programmes and isolated projects, thus it has no direct impact on development per se.

**Gender and Development (GAD)**

The GAD approach concentrates on the unequal relations between men and women that are limiting development. As an analytical tool, the term gender arose from an increasing awareness of inequalities due to institutional structures, It focuses not only on women as an isolated or homogenous group but on the roles and needs of both women and men. Given that women are usually in a disadvantaged position compared to men, promotion of gender equality implies an explicit attention to women’s needs, interests and perspectives. The objective then is the advancement of the status of women in society, with gender equality as the ultimate goal.

**Gender mainstreaming**

6. **Using the case study**, list at least ten government and other stakeholders who would need to be involved and what they would need to do if all the challenges raised were to be effectively addressed:

	<b>Actions to be taken</b>	<b>Who responsible</b>
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7. From this exercise, what do you understand as the meaning of gender mainstreaming?

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**Definition**

Gender mainstreaming is the *process* of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas at all levels. It is a *strategy* for making women as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic, societal spheres so that women and men benefit equally and inequality is not perpetuated.





## Fact sheet 2: Gender Mainstreaming

### What gender mainstreaming is:

- About reducing poverty, boosting economic growth and strengthening citizenship.
- A pro-active process designed to tackle inequalities which can and do discriminate against either sex.
- Targets major economic and social policies that deliver major resources.
- Makes good economic sense ensuring that women as well as men are active, using 100% of the productive labour force.
- Recognises that gender is one of the most fundamental organising features in society and affects our lives from the moment we are born.
- Recognises that differences exist in men's and women's lives and therefore our needs, experiences and priorities are different.
- Involves a willingness to establish a balanced distribution of responsibilities between women and men.
- Needs determined political action and support with clear indicators and targets.
- Will not happen overnight, it is a continuous process.
- Gender mainstreaming means Differences between women and men may never be used as a ground for discrimination.
- Long-lasting changes in society, transforming parental roles, family structures, and the organisation of work, time and even institutional practices.
- Reshaping the mainstream rather than adding activities for women at the margins.
- A partnership between women and men to ensure both participate fully in society's development and benefit equally from society's resources.
- Responding to the root causes of inequality and putting remedial action in place.
- Ensuring that initiatives not only respond to gender differences but seek to reduce gender inequality.
- Asking the right question to see where limited resources should be best diverted.
- More attention to men and their role in creating a more equal society.

### What gender mainstreaming is NOT

- A women only issue; women taking action, and only women benefiting from it.
- Just about improving access or of balancing the statistics.
- About having well written statements.
- About blaming anybody for the inequalities which exist.
- About stopping or replacing gender specific policies and projects targeted at either women or men.

*Excerpts from: European Communities (2005) EQUAL Guide on Gender Mainstreaming*

8. Which of the possible policy options **in the case study presented earlier**, would you describe as:

a) Gender blind?

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b) Gender neutral?

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c) Gender aware?

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9. What do you understand to be the difference between a gender blind, gender neutral and gender aware approach?

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**Definitions**

**Gender blind** ignores the different socially determined roles, responsibilities and capabilities of women and women. It is based on information derived from men’s activities and/or assumes those affected by the policy/project/programme have the same (male) needs and interests.

**Gender neutral** is not specifically aimed at either women or men and is assumed to affect both sexes equally. However, it may actually be gender blind.

**Gender aware** recognise that women and men, have an important role to play in society; that the nature of women’s involvement is determined by gender relations, which make their involvement different and often unequal; and that consequently women have different needs, interests and priorities, which may sometimes conflict with those of men.



### Fact sheet 3: Gender aware policy development

Policy in development guides any stated action, and influences how rights, opportunities and benefits are to be distributed. SADC governments have adopted different approaches in their efforts to mainstream gender in development planning, and this has implications on the nature of the policy adopted and its likely gender impact on the identified issues or problems being addressed.

*Welfare:* promotes social safety nets to cushion the lives of poor people from negative impact of liberal macro economic policies. It locates women within a family setting and there are generally no efforts made to mainstream gender in planning; gender is seen as women's responsibility through welfare departments. This policy approach thus has no impact in addressing gender inequalities, save for some practical needs. Women are seen as passive recipients of welfare.

*Anti Poverty:* based on the idea that helping poor women will increase their productivity and improve their economic growth – women are seen as 'vehicles of development'; poverty seen as purely an issue of underdevelopment, not one of unequal power relations. Women's role in decision making is not promoted save for limited focus on projects and NGOs. Gender planning is not overall evident, usually limited to women's units in welfare departments and rural development strategies. Impact is limited to meeting practical gender needs, often without much success.

*Efficiency:* Focuses on use of women's production role as labour in economic development, particularly due to global changes. The idea is that women can help to make the system better. The development approach is 'faster growth through human resource capacity building'. Gender planning does not focus on structural changes; the emphasis is on sectoral programmes in areas such as health, education, welfare, women's units. The impact of these programmes is greater visibility of women in productive roles, and increases women's exploitation and the burden of multiple roles; structural inequalities remain.

*Equity:* This approach seeks to make visible women's contribution to development (waged and unwaged), and fair treatment as a fundamental value. Here the state provides a legal framework promoting fair treatment for women, particularly in governance and the economy. Gender issues are not visible in planning, and strong state centred approach still means men dominate. Systematic inequality is not tackled by this approach, though it has the potential to address gender inequality.

*Empowerment/Transformation:* This approach is based on the understanding that by raising gender awareness and a critical analysis of social and structural problems through education that is mass based and popular, conditions will be created where poor men and women can participate in change processes so that oppressive structures, policies and programmes are transformed. In this way, women's social, economic and political empowerment will take place. The state plays a central role in promoting women's rights and the rights of the poor. In this approach gender is to be integrated into development planning with new structures and policies required to respond to this need. This approach has potential to impact positively on the realisation of women's strategic needs, however, it is 'not accepted by mainstream development agencies', and the push has mostly come from progressive women's movements.

There is not strict categorisation in terms of policy approaches, and it is often that there is an overlap, though the SADC region is moving towards rooting its gender mainstreaming processes in the empowerment/transformation approach.

Source: Commonwealth Secretariat and Commonwealth Learning (2004) The GMS Toolkit

