**ANNEX 11:**

GENDER ANALYSIS SCOPE OF WORK TEMPLATE

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| **ABOUT THIS TEMPLATE:**  *This is a template for a gender analysis scope of work (SOW), for post-award gender analyses conducted by implementing partners with the help of an external consultant or contractor. It includes optional sections and subheadings that can be included or removed as needed. If conducting the analysis in-house, completing sections 1-4 is helpful for the planning process. Text in italics offers guidance and tips and should be deleted in the SOW.* |

**TABLE 11-1. ESSENTIAL ELEMENTS OF THE SOW**

|  |  |
| --- | --- |
| Project Name |  |
| Gender Analysis Point of Contact |  |
| Gender Analysis Steering Committee Members |  |

**1. PROJECT DESCRIPTION**

*[****Guidance****: This section summarizes information about the USAID project. The first section includes information required before conducting a gender analysis. The second section includes additional information to include if possible.]*

* Project Overview/Results Framework*: Describe the major focus of the project and its results framework.*
* Key Stakeholders: *Identify key project stakeholders, such as sub-recipients and other partners.*
* Priority participants: *Who will the project primarily work with and seek to benefit? Make sure to mention any prioritized marginalized groups.*
* Geographic focus(es)*: Will the project be nationwide? Does it include sub-national focus areas?*

**2. PURPOSE OF THE GENDER ANALYSIS**

*[****Guidance****: This section is standard text about the purpose of a post-award gender analysis conducted by an implementing partner and can be included as written. However, the section “Proposed Gender Analysis Questions” should be customized to detail the specific questions proposed for your analysis.]*

The purpose of the gender analysis is to inform the development of [XXX] project’s Gender Equality Action Plan (GAP), which will outline an overall strategy for integrating gender within the project. The gender analysis will examine the following broad questions; more specific questions will be detailed in the Proposed Gender Analysis Questions section below.

* **CONTEXT**: What are the gender gaps and root causes of gender inequalities, including across identified marginalized groups, that will affect achievement of the project objectives during implementation, specific to the target geographic locations? How will this context influence the project outcomes for women and girls, men and boys, and gender-diverse individuals?
* **OPPORTUNITIES**: What specific integration strategies will the project adopt to advance gender equality in response to this context? How will the project track and report on reducing gender gaps and addressing root causes of gender inequality, including across identified marginalized groups?
* **RISKS**: Are there potential gender-specific risks or unintended consequences that the project activities may pose to certain groups? How can the project mitigate these risks?

**3. PROPOSED GENDER ANALYSIS QUESTIONS**

*[****Guidance****: This section helps the gender analysis team brainstorm about focus areas for the gender analysis to explore. Review the high-level gender analysis questions in Section 2, and brainstorm how these questions can be examined within the specific context of the project. See* [*Annex 5*](https://www.genderlinks.org/sites/default/files/2024-12/Annex-5.-Gender-Analysis-Domains-and-Customized-Questions.pdf) *for links to resources with sector-specific questions that can be helpful for guiding the desk review.]*

**Project-Specific Gender Analysis Questions**: The following areas of inquiry will be examined through the gender analysis, with further refinement to take place during the desk review.

* **Sub-Heading**. *Brainstorm a list of questions that align with the structure of the project’s results framework (e.g., Objectives or Intermediate Results). These should delve deeper into the overarching project-level gender analysis questions outlined in Section 2, “Purpose of the Gender Analysis,” by focusing on specific gender issues relevant to the project’s results framework and workplan.*
  + [Line of inquiry]
  + [Line of inquiry]
  + [Line of inquiry]
* **Sub-Heading**.
  + [Line of inquiry]
  + [Line of inquiry]
  + [Line of inquiry]

**Intersectional Identities:** The gender analysis will reflect that everyone has multiple socially relevant characteristics and identities shaping their experiences. The analysis will examine how the following characteristics affect a person’s experiences of gender inequalities: [identify specific characteristics, such as age, marital status, geographic location, education level, socioeconomic status, citizenship, religion, and sexual orientation].

**Marginalized Groups [for Gender Equality and Inclusive Development (GID) Analyses]:** The GID analysis will examine the various inclusion gaps experienced by the following marginalized groups. It will identify the root causes of marginalization and will analyze the risks of creating unintended harm. The analysis will seek to reflect the unique needs, perspectives, and priorities of these groups: [Identify **up to three** groups].

*Marginalized groups may include (but are not limited to): women; youth; children in adversity and their families; older persons; persons with disabilities; Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex (LGBTQI+) people; displaced persons; migrants; Indigenous Peoples and communities; non-dominant religious, racial, and ethnic groups; people of castes traditionally considered lower; people of lower socioeconomic status; and people with unmet mental health needs.*

**Gender Analysis Domains**: The analysis will gather data to examine gender dynamics across the five USAID gender analysis domains, with an additional sixth recommended domain to be included as applicable. (See [ADS 205.3.2 What is Gender Analysis?](https://www.usaid.gov/sites/default/files/2023-04/205.pdf))

* Laws, Policies, Regulations, and Institutional Practices
* Cultural Norms and Beliefs
* Gender Roles, Responsibilities, and Time Use
* Access to and Control over Assets and Resources
* Patterns of Power and Decision-making
* Personal Safety and Security (recommended for inclusive development analyses)

The gender analysis will include gender analysis questions relevant to each of these domains, to capture the full scope of relevant gender dynamics as well as the underlying factors that sustain gender inequalities in the context of [XXX] project.

**4. METHODOLOGY**

*[****Guidance****: This section describes the approach for collecting and analyzing data. The process suggested below applies to a gender analysis that requires primary data collection. However, the choice of appropriate methodology will depend on what secondary data are available and other factors. Specifically, the Gender Analysis Kick-Off Planning Session (see* [*Annex 10*](https://www.genderlinks.org/sites/default/files/2024-12/Annex-10.-Tips-for-a-Gender-Analysis-Kick-Off-Planning-Session.pdf)*), together with the preliminary desk review, will determine whether there is enough secondary data to answer the gender analysis questions, whether the project context is conducive to collecting primary data, and whether there is available time and budget for primary data collection.]*

* **Desk Review (Required)**: A desk review will be conducted of existing literature, including USAID and third-party gender analyses, research papers, reports, policy documents, evaluations, and quantitative data sets. [Include if applicable:] A preliminary list of literature to be reviewed is given below, with additional resources to be identified during the desk review.
  + *[Optional: List sources to be examined, especially those that may not be publicly available and require USAID access. See* [*Annex 12: Desk Review Sources*](https://www.genderlinks.org/sites/default/files/2024-12/Annex-12.-Desk-Review-Sources.pdf)*.]*
* **Internal Discussion of Desk Review Findings and Next Steps**: Following the completion of the desk review, an internal session will be held with the Gender Analysis Steering Committee team. During this session, desk review findings will be presented for discussion. Staff will provide their insights and discuss whether the identified findings align with their experiences and knowledge. The session will examine whether the desk review findings adequately address the proposed gender analysis questions, as well as any new questions designed to fill gaps in the existing literature. The team will collectively evaluate the need for primary data collection, considering not only the desk review findings but also available time and resources.
* **Primary Data Collection (Optional)**: To address the information gaps from the desk review, the analysis will involve primary data collection using targeted interviews, focus groups, and validation workshops as necessary. The specific gender analysis questions and stakeholders to be engaged will be identified based on the desk review results. [Include if applicable:] Preliminary priorities for data collection include:
  + *[Optional: Add bullet points with specific stakeholders you would like to see engaged. Examples include relevant government entities, civil society organizations, other donors, and potential partners and participants.]*
* **Consultation on Preliminary Findings and Recommendations**: After primary data has been analyzed, a consultation session will be held to validate findings and brainstorm recommendations. Consultation session(s) will be held with the following stakeholders: [XXX]. *[Refer to* [*Annex 17: Validation Workshops for one approach to consultation sessions*](https://www.genderlinks.org/sites/default/files/2024-12/Annex-17.-Validation-Workshops.pdf)*.]*
* **Review of Draft Report**: The draft gender analysis report will be reviewed by Steering Committee members, relevant partners, and the project Agreement Officer’s Representative/Contracting Officer’s Representative. *[Adjust reviewers as applicable.]*
* **Finalization of Findings and Recommendations**: The final presentation of gender analysis findings and recommendations will be updated based on reviewers’ feedback.
* **Development of the Gender Equality Action Plan (GAP)**: The final gender analysis findings and recommendations will inform the development of the GAP, which outlines the gender gaps to be addressed, actions to address the gaps, responsible person(s) for each action; timeline; resources; indicators and targets; and key stakeholders. See [Annex 3: USAID Post-Award Gender Equality Action Plan Guidance for Implementing Partners](https://www.genderlinks.org/sites/default/files/2024-12/Annex-3.-Implementing-Partner-Gender-Action-Plan-Guidance.pdf).

**5. FINAL PRODUCT**

*[****Guidance****: This section should provide specifications for the gender analysis report’s format and organization, as well as any supplemental final products. See* [*Annex 1: USAID Post-Award Gender Analysis Template*](https://www.genderlinks.org/sites/default/files/2024-12/Annex-1.-USAID-Post-Award-Gender-Analysis-Template.docx) *for a simplified presentation of findings and results, and* [*Annex 2: USAID Post-Award Gender Analysis Formatted as a Report*](https://www.genderlinks.org/sites/default/files/2024-12/Annex-2.-Gender-Analysis-Formatted-as-a-Report.docx)*. Adapt this section based on the template used.]*

* **Page Length**: The report will be up to 15 pages (excluding annexes). *[The maximum suggested length is 15 pages.]*
* Required content (optional): The report should include:
  + A succinct executive summary
  + Overview of methodology, noting any limitations.
  + Key data disaggregated by sex, age, ethnicity, sexual orientation, gender identity, and other identities or categories, as available. Data should be presented in easy-to-read formats that can be easily extracted, such as tables, graphs, and charts.
  + Findings and recommendations, organized by the gender analysis analytical framework. *[****Tip****: Organize the report using the analytical framework that aligns with the structure of the project design, such as by sectors, components, objectives, or intermediary results. Organizing by gender analysis domain is discouraged, as it may require further work to incorporate within the appropriate sections of the solicitation.]*
  + Additional content may include:
    - Proposed questions to be examined in a gender analysis developed by the implementing partner post-award
    - Recommended gender indicators
    - Questions to support project learning agendas
  + Annex of Consulted Resources
* **Supplemental Final Products (optional)**: *[Consider any supplemental final products that would facilitate the uptake of findings. Illustrative examples are provided below. This section may be helpful in drafting SOWs for external consultants/contractors.]*
  + Summary slide deck of the report, to present findings and facilitate further discussions
  + Translation of the report into local language(s)

**6. TEAM COMPOSITION (Optional)**

The contractor will assemble a gender analysis team led by a team leader experienced in delivering gender analyses in compliance with ADS 205. The contractor must ensure a diverse team of different gender identities that provides: sector-specific expertise; experience in qualitative data collection methods; relevant linguistic skills; and strong writing skills. Team formation should prioritize local expertise with deep knowledge and connections to local stakeholders.

All team members must provide a signed statement attesting that they have no conflict of interest and that all work conducted under this SOW will remain confidential.

*[The following examples of potential position qualifications should be adjusted based on the size and composition of the team.]*

**Team Leader**

* At least seven years’ experience in gender analysis within the target sector or the geographic area of the activity
* Master’s degree in sociology, anthropology, gender studies, international development, or other relevant social science field
* Experience designing and leading desk reviews and qualitative research, including developing research tools and methods for organizing analytical findings
* Excellent oral and written communication skills in English (required), and in [local language] (preferred)
* Ability to communicate diplomatically and clearly with project staff and local stakeholders

**Gender Expert**

* Graduate degree in development studies, gender studies, or relevant social sciences field preferred.
* At least five years’ experience in gender integration within development programming, with experience developing at least one gender analysis to inform project design or strategy. *[Note: You may choose to further specify the number of years of experience in conducting gender analyses.]*
* Proven experience conducting desk reviews and qualitative research, including interviews and focus groups.
* Experience working in [sector] projects is desirable.
* Demonstrated understanding of intersectional considerations and social inclusion.
* Demonstrated experience and commitment to working on gender equality and women’s empowerment issues in [country of project]. Ideally has existing relationships with women’s rights organizations and organizations focusing on gender equality.
* Strong communication and interpersonal skills, including active listening and openness to feedback.
* Proficient in using Word, PowerPoint, and Excel.

**7. DELIVERABLES AND TIMELINE (Optional)**

*[****Guidance****: This section is intended for deliverables and timeline if a contractor or consultant is engaged. However, the Gender Analysis Steering Committee may wish to develop a similar deliverable timeline for an in-house gender analysis, to ensure the timely completion of each critical step of the process.]*

The consultant/contractor will provide the following deliverables. [Add or delete items as relevant.]

**TABLE 11-2. DELIVERABLES TIMELINE**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Steps** | **Deliverable** | **Target Timeline** |
| 1. | Kick-Off Meeting and Updated Timeline | Updated timeline for gender analysis steps |  |
| 2 | Desk Review | Inception report: summarize the desk review and identify information gaps to be addressed through primary data collection |  |
| 3. | Design of primary data collection methodology | Proposal of primary data collection methodology, including lines of inquiry, methods, target numbers, stakeholder profiles, timeline, and how data will be validated |  |
| 3. | Design and test primary data collection tool(s) | Finalized data collection tools |  |
| 4. | Primary data collection | Electronic copies, raw data/transcripts |  |
| 5. | Data analysis | Draft gender analysis report |  |
| 6. | Validation Workshop: presentation of findings and co-development of recommendations | Updated findings and recommendations based on stakeholder input |  |
| 7. | Final presentation of gender analysis findings and recommendations | Final gender analysis report, including an action plan |  |
| 8. | GAP development | Final GAP |  |