



Judith Escribano/Age International

Gender equality learning pack

Part of the HelpAge International
Gender equality training toolkit



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Introduction

Gender equality means equal rights, responsibilities, opportunities and treatment of women, men and people of other genders. It is not about one group gaining more power to the detriment of another, rather it is about ensuring that all persons are treated with dignity and can develop their full potential. HelpAge International's position is that all older people should be recognised and respected as individuals with equal dignity, to be embraced equally and treated fairly and without discrimination, whatever their diverse and overlapping identities, values, beliefs or needs.

Our 2030 Strategy commits us to achieving impact on the wellbeing, dignity and voice of older people in their diversity. We will leave people behind in this effort if our work is gender blind. HelpAge will ensure all are included, through the promotion of gender equality in our work, particularly towards the empowerment of older women and the transformation of currently unequal gender relations between women and men. We will also seek better evidence so we can better understand and address specific gendered inequalities that older men may face. In addition, we will remain sensitive to gender identities not expressed within binary categories.

In taking these commitments forward, we recognise that gender affects us all and that equality between genders benefits all – individuals, families and communities – and is therefore a population-wide issue. For instance, older women make substantial economic and social contributions to society. They also represent an important and growing political constituency in both developed and developing countries. Recognising and supporting their full participation will benefit the health and well-being of individuals, families, communities and nations.

Gender should therefore not be treated as a separate issue, but rather as a “lens” through which we view and plan all our work. Gender-sensitive work therefore goes beyond targeting equal numbers of male and female participants – it is about redressing imbalances and tailoring activities to the specific needs and interests of women, men and people of other genders.

Consideration of gender in our work can help us identify whether our approach to gender helps or hinders equal opportunities and outcomes for women and men across each of our Strategy 2030 focus areas.¹ While it is often women who have less access to resources, power and opportunities, men's lives may also be adversely affected by their gender roles. Equality does not mean that women and men become the same, rather that women's and men's rights, responsibilities and opportunities do not depend on whether they are born, or identify as, male, female or other.

How gender and ageing intersect

- Gender roles can change with age. Older people often fulfil roles that are not typical of their gender, such as older men caring for their grandchildren, and older women heading households.
- Gender-based discrimination, particularly in later life, can be hidden by a lack of sex- and age- disaggregated data. This is a major constraint to developing gender-responsive policies and programmes.
- Gender-based discrimination can accumulate over a person's lifetime and be exacerbated in older age.
- Older women can face double discrimination based on both their age and gender.
- Older men can experience challenges to masculinity that can leave them feeling isolated.
- Older women and men, and older people of other genders are at risk of gender-based violence. It is about abuse of power.
- Understanding our changing gender identities and power relations throughout life is crucial to understanding our experience of ageing.

1. Income security; Healthy ageing; Inclusive humanitarian action; Freedom from violence, abuse and neglect; Lifelong learning; A society for all ages; Age-inclusive systems; A stand against ageism; Technology embraced; A movement for change

Understanding sex and gender

HelpAge has up to now adopted language that reflects a binary understanding of gender in our work on gender equality and gender mainstreaming – that is, recognising just two genders, male and female. However, we recognise that understanding of sex, gender and identity is evolving, and that individuals or groups who do not identify within established gender or social norms often face stigma, discrimination or social exclusion.

In keeping with our organisational values and commitment to gender equality, we recognise that our own language, understanding and capabilities in relation to sex and gender must evolve beyond a binary understanding. This will be a learning process for the organisation for the duration of the 2030 Strategy, and will be informed and guided by the lived experience of the older people we work with and human rights principles and standards. This issue will be more fully addressed in future updates of the training toolkit.

Gender mainstreaming and targeting

In line with our strategy on gender equality, we will continue to review and adapt our “twin-track” approach of gender “mainstreaming” and gender “targeting” to ensure that our work is inclusive and respectful of all older people, whatever their expressed gender identity.

Gender mainstreaming means that gender is considered in everything we do. The starting point for this “gender sensitivity” is gender analysis, which enables us to identify and act to address gender-based inequalities and power imbalances.

Targeted approaches generally seek “gender-transformative” change by promoting older women’s voice and rights in order to create gender equality in older people’s roles, status, access to and control over resources and influence. Further guidance on these approaches is available in Module 1, Section 3 of this Learning pack and in HelpAge’s Minimum standards for gender mainstreaming (see the Annex).

About this Learning pack

This Learning pack is designed for HelpAge gender focal points, staff, network members and partners to use for complementary distance learning. It is part of a Gender equality training toolkit that also includes a Training manual and a set of Handouts.

It is designed for you to:

- reflect on your perceptions of gender and other identities, along the life course and particularly in older age, and challenge unconscious bias
- understand discrimination based on bias towards gender and other identities, particularly with regard to older people
- develop an understanding of why gender analysis is important in all development and humanitarian interventions
- learn how to carry out a gender analysis.

The Learning pack provides an Annex listing further reading to support learning before, after or alongside the training. It includes a Glossary of terms, more in-depth discussion of the topics covered in the Training manual, and quizzes to check what you have learnt.

Module 1 discusses the difference between sex and gender. It looks at gender roles and needs, and compares gender-sensitive and gender-transformative approaches. Module 2 looks at perceptions and discrimination, and barriers to inclusion. Module 3 explains what gender analysis and mainstreaming mean for projects, advocacy and organisations. Module 4 helps you apply a gender analysis in different contexts.

Module 1

Sex and gender

Section 1: Sex, gender and sexual orientation

Learning objectives: Understand the difference between sex, gender and sexual orientation. Understand perceptions and stereotypes about women and men.

Difference between sex, gender and sexual orientation

Sex refers to physical and biological attributes such as sex chromosomes, hormones and reproductive organs, which are used at birth to identify individuals as female or male. There are some people born with attributes that are neither exclusively male nor female, a category known as intersex.

Gender refers to the social differences ascribed to women and men, which are often central to the way in which people define themselves and are defined by others. Gender roles are learned, changeable over time, and variable within and between cultures. Gender often defines the duties, responsibilities, constraints, opportunities and privileges of women, men, girls, and boys in any context.

Sex	Gender
<p>Sex refers to biological aspects of an individual and the differences between males and females as determined by their chromosomal, anatomical, reproductive, and hormonal characteristics.</p> <p>Sex is determined at birth. It is universal and unchangeable without medical intervention.</p> <p>Sex:</p> <ul style="list-style-type: none">• is biological• is unchangeable (without medical intervention)• is universal• physical characteristics• reproductive characteristics	<p>Gender encompasses the economic, political, legal, psychological and socio-cultural attributes, constraints and opportunities associated with being male or female.</p> <p>It is socially constructed, learnt through socialisation and changes according to time and context.</p> <p>Gender:</p> <ul style="list-style-type: none">• is social and cultural• is externally and internally constructed• is learnt• is changeable• is different from one society to another

Intersex

Globally, up to 1.7 per cent of people have intersex traits,² that is, any of several variations of sex-defining characteristics such as chromosomes, sex organs, or sex hormones. They, therefore, do not fit strict definitions of male or female.

Intersex people are often stigmatised from birth. This may include being abandoned or killed. Globally, doctors and parents usually decide the sex of an intersex child through hormonal and/or surgical interventions. This may cause difficulties for a person whose gender is assigned accordingly but does not match how they feel.

2. <https://www.unfe.org/wp-content/uploads/2017/05/UNFE-Intersex.pdf>



Knowledge box

As a social construct, what gender means varies across cultures. It is open to change over time. Because of this, gender roles and relations should not be assumed but analysed.

Gender reflects the norms of a society that explain what behaviours are appropriate for women, men and people of other genders: what they are expected to do, what they are expected to be good at, how they should look (clothes, hairstyle, etc), how they should relate to each other.



Jonas Wresch/HelpAge International



Hereward Holland/Age International

Roles and responsibilities are generally assigned to women or men, for example, through legislation or religious interpretation. Children learn about social norms for girls and boys, women and men. The roles and responsibilities of women and girls, and men and boys, have different values. This leads to gender inequality.



Jonas Wresch/HelpAge International

The terms “masculinity” and “femininity” refer to traits or characteristics typically associated with being male or female.

Masculinity	Femininity
<ul style="list-style-type: none"> • Physical strength • Intelligence • Activeness • Aggression • Security • Rational • Ambition • Confidence • Decisive • Strategic 	<ul style="list-style-type: none"> • Weakness • Beauty • Passiveness • Sensitive • Insecurity • Irrational • Caring • Nurturing • Kindness • Emotional



Gender is not always strictly masculine or feminine. We all have traits and qualities that may be seen as “typical” of the other gender. Men can be very caring, sensitive and emotional, and women can be tough, outgoing and ambitious. While such attributes are often seen as negative because they are not in keeping with gender norms, they do not make us less of a woman or man but attest to the diversity of human beings. It is important to understand that the concept of gender evolves and changes over time.

Gender identity is regarded as a person’s deeply felt internal and individual experience of gender, which may or may not correspond with their sex assigned at birth. Gender is increasingly understood as not binary (woman/man) but on a spectrum. Growing numbers of people are identifying as somewhere along the spectrum, from being a woman or man, to being non-gendered. Gender identity is different from sexual orientation.

A girl may identify as a boy, and a man may identify as a woman. They may dress and behave according to the gender they identify with. People who have a gender identity that does not correspond with their sex assigned at birth may describe themselves as transgender. Transgender people may identify as male or female, or they may feel that neither label fits them.

Some people have a gender that blends elements of being a woman or a man, or a gender that is neither female nor male. Some people do not identify with any gender. Some people’s gender changes over time. People whose gender is neither female nor male use different terms to describe themselves, with non-binary being one of the most common. Another term is queer. None of these terms means exactly the same thing. They are all used to describe an experience of gender that is not simply female or male.

Why non-binary?

Some societies recognise just two genders, woman and man. The idea that there are only two genders is sometimes called the “gender binary” because binary means having two parts. Therefore, “non-binary” is one term people use to describe genders that do not fall into only one of these two categories, woman or man.



**Knowledge
box**

Some cultures have historically recognised a third gender. For example, the Fa'afafines in Samoa and the Hijra in South Asia are accepted as transgender and intersex people. However, in many countries, the social and legal acceptance of people of non-binary genders is still being fought for.



Cherrie Mio Rhodes/Flickr

The Divas of Samoa, Fa'afafine show.



Nick Kenrick/Flickr

Hijras in Bari Basti, Pushkar, Rajasthan.

Case study

Third gender

In Samoa, South Pacific, the Fa'afafine people do not fit into the gender models of male and female. Fa'afafines (literally “the manner of woman”) are people who are biologically male but raised as and identify as female. This third gender has been culturally accepted for generations and accounts for approximately 1–5 per cent of Samoa's population.

Source: <https://www.bbc.co.uk/news/world-asia-37227803>

Sexual orientation is a term used to describe whether a person feels attracted sexually and/or romantically to people of another sex, the same sex or both. People who are attracted to the opposite sex are heterosexual. Men attracted to other men are gay (or homosexual). Women attracted to other women are lesbian (or homosexual). Bisexual refers to a person of any gender who is attracted to more than one gender.

Social expectations linked to gender affect how women and men behave. This includes their sexual behaviours, attitudes and feelings. Pressure to conform to society's norms can have negative consequences for both women and men.

Homosexuality is still illegal in many countries. In many others it is still severely frowned upon. People who identify as having a gender that is different from their sex often face discrimination and violence, including from family and friends.

People who identify as having a gender that is different from their sex, or who are attracted to people of their own sex, are described as members of the LGBTQI+ community (lesbian, gay, bisexual, transgender, queer, intersex and plus, which includes any orientation not represented by these letters). They may organise themselves to influence government and society to protect their human rights and promote their opportunities and dignity. For more information on LGBTQI+ resources please refer to the Annex.

Sexual orientation and gender identity are not a choice. They are innate characteristics. Being homosexual or having a different gender identity is not a disease. They are not the result of any external influence. People cannot be “cured” or “unlearn” their sexual orientation or gender identity.

- Gender refers to relationships between women and men. These relationships are constructed by society. They are based on people's expectations of women and men and their perceived value in society.
- This means that there is a hierarchy of characteristics associated with women and men, and a hierarchy of roles and responsibilities. These hierarchies affect how women and men are valued. They lead to unequal power relationships between women and men.
- However, the roles of women and men and the power relationships between them can change over time. This has happened before and is likely to continue happening. There is a continued opportunity to promote gender equality.
- Most gender roles are context-specific. This means they largely depend on where people live, their cultural background, age, socio-economic status and so on.
- Individual people experience life differently at different ages and life stages. People in different age groups (younger children, adolescents, younger adults, older adults etc) and with different marital status (unmarried, married, widowed, separated, divorced, etc) experience gender and power issues differently.
- Gender relations are reinforced by institutional systems such as laws and religious doctrines that reflect the values attached by society to the roles of women and men.

Section 2: Gender roles and needs

Learning objectives: Understand gender roles and responsibilities and their link with values and power relations.

What are the gender roles?

Gender roles are commonly divided into productive, reproductive and community roles.

Productive roles are activities carried out to secure goods or services for sale to enable people to survive. They include employment, farming and trading.

Depending on the socio-cultural context, women and men may carry out preferred or assigned types of productive activities with different levels of responsibilities and pay. For example, men often hold higher management positions, such as school head, director of a bank or business, responsibility for animals with a higher value than animals looked after by women. Women often have lower-ranked work as assistants, carers, keeping small animals or running market stalls. Position and pay reflect status. In most countries, even if women do the same work as men, they are still paid less than men.

Women work longer than men

Caring responsibilities for children, older people and sick people, as well as household duties, are mainly borne by women. Globally, women spend two to ten more time a day of unpaid care than men.³ Many older women are denied access to the formal labour market and work as unpaid carers of children and other family members.⁴



Mayur Paul/HelpAge International

3. https://www.oecd.org/dev/development-gender/Unpaid_care_work.pdf

4. <https://www.helpage.org/global-agewatch/reports/global-agewatch-index-2015-insight-report-summary-and-methodology>

Reproductive roles are activities that keep families alive and well. They include childbearing, caring for family members and managing the home (such as fetching water and firewood). Reproductive roles are often manual, time-consuming and unpaid.

Community roles are activities that promote community cohesion. They include organising social events such as ceremonies and celebrations, arranging community improvements and serving on committees. Women's community roles are often an extension of their reproductive roles of mobilising, caring and providing, performed on a voluntary, unpaid basis. Men's community roles are often political and include decision-making. They are more often paid and associated with status and power.

Because men are usually considered to be single-minded and able to focus on their productive role of providing for the family, they tend to get higher-level jobs, promotions and better pay. Women are often assumed to get distracted by their reproductive roles and therefore are incapable of focusing on strategic decision-making.

Because reproductive tasks are unpaid, they are not considered work. A high value is therefore not attached to the person performing these tasks. Since they are usually performed by women, women are often undervalued and seen as less capable and less important than men, even though they work long hours and multi-task to fulfil their responsibilities.



Section 3: Gender-sensitive and gender-transformative approaches

Learning objective: Understand different gender needs.

Practical and strategic gender needs

Because women and men often have different roles, they often have different practical and strategic needs.

Practical needs tend to be immediate and short-term. They relate to things people need to survive in their particular living environment, such as food, housing, healthcare, water and income. Practical needs are met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses. Interventions designed to meet practical needs do not necessarily challenge existing gender roles and norms perpetuating gender inequality.

Men's practical needs are similar to women's, but the activities they carry out to meet their practical needs may be different because of different gender roles.

Strategic needs tend to be long-term. They include legal rights (such as land and inheritance rights), protection from domestic violence, equal pay, and women's control over their bodies. Interventions designed to meet these needs challenge the subordinate role of women in society. They relate to the division of labour (who does what), power and control (who has what and who decides how to use it). Addressing strategic needs means transforming gender relations and promoting gender equality.

Women's strategic needs often reflect the fact that their position in society is inferior to that of men (as legislation and practices generally favour men). However, as meeting women's strategic needs may change gender roles, it may be in men's strategic interest to become more involved in roles that have been performed by women, for example, childcare.

A strategic need would then be for paternity leave to enable the man to do some of the childcare and support the mother. It may also be in men's interest to promote equal pay for men and women to ease their burden of being the sole or main breadwinner.

Women's representation

Women's representation in local governments can make a difference. Research on *panchayats* (local councils) in India discovered that the number of drinking water projects in areas with women-led councils was 62 per cent higher than in those with men-led councils. In Norway, a direct causal relationship between the presence of women in municipal councils and childcare coverage was found.⁵

5. https://www.uclg.org/sites/default/files/the_role_of_local_governments_in_promoting_gender_equality_for_sustainability.pdf

Gender approaches

Approaches may be gender-neutral, gender-sensitive or gender-transformative.

Gender-neutral approach

- Some gender and age analysis is done, but used as background information.
- Gender- and age-disaggregated data is presented but not analysed.
- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are not included.
- Resources are not allocated to activities promoting gender equality.

Gender-sensitive approach

- Gender and age analysis is done.
- Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed.
- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included.
- The intervention is more likely to focus on their practical or immediate needs.

Gender-transformative approach

- Both quantitative and qualitative gender and age analysis is done.
- Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources.
- Gender equality is promoted as a major goal.
- The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes.
- Gender is built into the response and the causes of inequality are addressed head on.

See the Glossary for definitions of terms used in this Module.

Practical and strategic gender needs

<p>Practical needs</p> <ul style="list-style-type: none"> • Tend to be immediate and short-term • Unique to particular women, men or people of other genders • Relate to the things people need to survive in their particular living environment, such as food, housing, healthcare, water and income • Easily identifiable by women, men or people of other genders • Met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses 	<p>Strategic needs</p> <ul style="list-style-type: none"> • Tend to be long-term • Common to almost all women, men or people of other genders • For women, often relate to their disadvantaged position over the life course, subordination, lack of resources and education, vulnerability to poverty and violence, etc • Basis of disadvantage and potential for change not always identifiable by women, men or people of other genders • Can be addressed by consciousness-raising, increasing self-confidence, education, strengthening movements, political mobilisation • Include legal rights (such as land and inheritance rights), protection from domestic violence, equal pay, and women's control over their bodies. These challenge the subordinate role of women in society. They relate to the division of labour (who does what), power and control (who has what and who decides how to use it)
<p>Addressing practical needs</p> <ul style="list-style-type: none"> • Project involves women, men or people of other genders as recipients and perhaps participants • Can improve the condition of women's, men's or people of other genders' lives • Does not alter existing gender roles and relations 	<p>Addressing strategic needs</p> <ul style="list-style-type: none"> • Project involves women, men or people of other genders as agents of change or enables them to become agents of change • Can improve the position of women or people of other genders in society through transformation of unequal power relations
<p>Gender-sensitive approach</p> <ul style="list-style-type: none"> • Gender and age analysis is done • Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed • Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included • The intervention is more likely to focus on their practical or immediate needs 	<p>Gender-transformative approach</p> <ul style="list-style-type: none"> • Both quantitative and qualitative gender and age analysis is done • Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources • Gender equality is promoted as a major goal • The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes • Gender is built into the response and the causes of inequality are addressed head on

Exercise: Gender roles and needs

Consider which roles and needs the activities listed in the table relate to. Put a cross in the appropriate spaces. Note that each activity could be associated with more than one role or need.

Activity	Women's role recognised			Gender need met	
	Reproductive	Productive	Community managing	Practical needs	Strategic needs

Training for employment

Training for women					
• cooking for family					
• tailoring for sale					
• masonry/carpentry					
• business management					
Access to credit*					
Allocated to household					
Allocated to women					

*micro-finance institutions or government

Basic services

Introduction of a crèche					
Located in the community					
Located at the mother's workplace					
Located at the father's workplace					
Primary healthcare centre					
Open only in the morning					
Open at different times					
Social benefits by government					
Allocated to household					
Allocated to women					

Community participation

Projects with community participation					
With unpaid women's time					
With paid women's time					

Exercise: Gender roles and needs (completed exercise)

The answers are given below.

Women's role recognised

Gender need met

Activity	Reproductive	Productive	Community managing	Practical needs	Strategic needs
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Training for employment

Training for women					
• cooking for family	X			X	
• tailoring for sale		X		X	
• masonry/carpentry		X		X	X
• business management		X			X
Access to credit*					
Allocated to household		X		X	
Allocated to women		X		X	X

*micro-finance institutions or government

Basic services

Introduction of a crèche					
Located in the community	X	X	X	X	
Located at the mother's workplace	X	X		X	
Located at the father's workplace	X	X		X	X
Primary healthcare centre					
Open only in the morning	X			X	
Open at different times	X			X	X
Social benefits by government					
Allocated to household		X		X	
Allocated to women		X		X	X

Community participation

Projects with community participation					
With unpaid women's time			X	X	
With paid women's time		X	X	X	X

Quiz

Try this quiz to check what you have learnt from this module. Answers at the end.

1. There is no difference between sex and gender.

True

False

2. There are only two genders, male and female.

True

False

3. Women give birth to babies and men do not. What accounts for this difference?

Sexual differences

Gender differences

4. In some countries, women are not able to inherit land or property. What is this because of?

Sex

Gender

5. Women's and men's roles can be different. They can vary over time and in different cultures and socio-economic contexts. What accounts for this?

Sex

Gender

6. When a woman is doing the laundry for her family, what role is she performing?

Reproductive role

Productive role

Community role

7. Practical needs are usually what?

Short-term

Long-term

8. What can meeting women's practical needs improve?

Women's position in society

The condition of women's lives

9. Addressing women's strategic needs means that women will have more power than men.

True

False

10. Gender-transformative interventions are based on:

Qualitative gender analysis

Quantitative gender analysis

Both

Neither

11. A gender-transformative project only considers women's practical needs and includes interventions that make it easier for them to fulfil their reproductive roles.

True

False

Answers: 1 False; 2 False; 3 Sexual differences; 4 Gender; 5 Gender; 6 Reproductive role; 7 Short-term; 8 Condition; 9 False; 10 Both; 11 False

Module 2

Perceptions and discrimination

Section 1: Stereotyping, prejudice and discrimination

Learning objectives: Understand stereotyping and discrimination based on gender, age and disability, and the impact this has.



Remember

- Gender refers to relationships between women and men. These relationships are constructed by society. They are based on people's expectations of women and men and their perceived value in society.
- This means that there is a hierarchy of characteristics associated with women and men, and a hierarchy of roles and responsibilities. These hierarchies affect how women and men are valued. They lead to unequal power relationships between women and men.
- However, the roles of women and men and the power relations between them can change over time. This has happened before and is likely to continue happening. There is a continued opportunity to promote gender equality.
- Most gender roles are context-specific. This means they largely depend on where people live, their cultural background, age, socio-economic status and so on.
- Individual people experience life differently at different ages and life stages. People in different age groups (children, adolescents, younger adults, older adults, etc) and with different marital status (unmarried, married, widowed, separated, divorced, etc) experience gender and power issues differently.
- Gender relations are reinforced by institutional systems such as laws and religious doctrines that reflect the values attached by society to the roles of women and men.

Stereotypes

We often have ideas about people we do not know by categorising them as members of certain groups. These groups may have specific characteristics or identities such as age, gender, ethnicity, disability, sexual orientation or location. What we think we know about people is often based on stereotypes.

Stereotypes are subjective ideas that are commonly held about how a certain group of people is expected to think and behave. Stereotypes are not necessarily true but are often considered as the truth. For example:

- Men are strong
- Women are emotional
- Older women are useless
- Girls are not as clever as boys
- Boys are rough
- Girls are easily scared
- Older people are stubborn
- Adolescents are only interested in partying
- Gay people are always thinking about sex
- Certain ethnic groups are less intelligent than others
- Men with disabilities are weak
- Older women are witches
- Older people are senile and a burden

Prejudice

Stereotypes manifest as prejudice. Prejudice is also subjective. It refers to our feelings about different groups of people. It is often based on the values that the majority of people in any community or society share, or seem to share. Based on our feelings about these groups, we pass judgment on the way they behave. For example:

- Young people from certain ethnic groups are dangerous and go about in gangs
- Men do not make good carers
- Women are too emotional to be any good at politics
- Menopausal women are too emotional and hormone-led to take on positions of responsibility
- Boys and men should not cry because it makes them look weak
- Disabled people are not able to work
- Older people live in the past and cannot make a useful contribution to society
- Adolescents are rude and lazy and don't want to work
- The idea of persons with disabilities having sex is disgusting
- LGBTQI+ people are sick in the head

All these examples are negative. However, stereotypes and prejudice can be based on positive ideas that may be just as unrealistic and unhelpful. For example:

- Women are good with children
- Persons with disabilities who are good at sports are superhuman
- Doctors are better than ordinary people
- People living in cities are cleverer and more sophisticated than those living in rural areas
- Older people are wise and know what's best

Discrimination

Discrimination refers to behaviour influenced by stereotypes and prejudice. For example:

- Women are paid less than men for doing the same work
- Members of certain ethnic groups are not offered jobs
- LGBTQI+ people are persecuted
- Older women are abandoned by their families
- Women can only do unpaid work in the home
- Children with disabilities are overlooked at school
- Older men cannot get a job or are forced to retire because they are "too old"
- Women are subjected to sexual violence

"I feel being made to retire at 55 is unfair, because I know I can still work... I'm still healthy."

Wasiti, retired teacher, Fiji



Types of discrimination

There are several types of discrimination:

- **Direct discrimination** is less favourable treatment of one person than another because of a particular characteristic, such as age, gender, ethnicity, disability, sexual orientation or location.
- **Indirect discrimination** is apparently neutral treatment of people with a particular characteristic that, in fact, puts them at a disadvantage compared with people who do not have that characteristic.
- **Positive discrimination** means treating someone with a particular characteristic more favourably than people who do not have that characteristic to counteract the effects of discrimination.

The international human rights legal framework includes instruments to combat specific forms of discrimination, including discrimination against indigenous peoples, migrants, minorities, people with disabilities, women, discrimination on racial and religious grounds, and discrimination based on sexual orientation and gender identity.

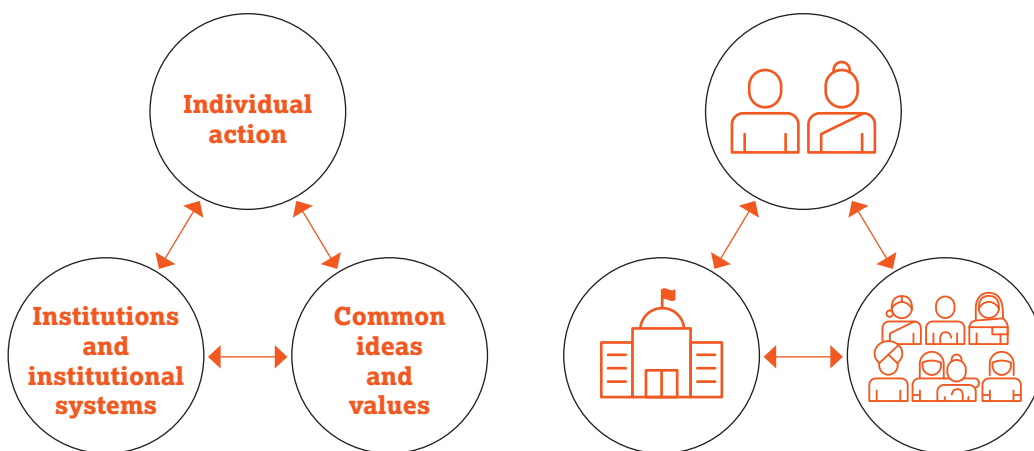
Human rights belong to everyone whatever their age, gender, ethnicity, disability, sexual orientation or location. Discrimination experienced by older people is based on age as well as other characteristics, including their gender.

Where do these attitudes and behaviour come from? Why do we think in terms of stereotypes? What makes us prejudiced and behave in a discriminatory way?

We are all individuals who live in communities. Society sets common ideas and values. We know they exist, even if they are not talked about or explained. For example, we learn about them when our parents or teachers tell us how to behave. We also know about policies, rules and laws set by institutions.

So, we have three interconnected influences or entities that interact with each other, as the diagram shows:

- Common ideas and values (social norms) influence individuals to act the way they do.
- Institutions and institutional systems are created by individuals. They make policies, so the arrow leads from individual action to institutions.
- Institutions, such as schools and the media, produce or reinforce common ideas and values, so the arrow leads from institutions to common ideas and values.
- Common ideas and values are reflected in legislation and practice set by institutions, so the arrow leads back.
- Individuals behave as policies and practice permit, so the arrow leads back from institutions to individuals.





Ageism and sexism

Older women face the accumulated effects of ageism and sexism in several areas of their lives. Older women are more likely than men to encounter ageist attitudes. They may face double discrimination in access to employment, pensions and services. While poverty rates among men and women do not differ much during working life, the difference increases after age 65, and even more so after age 75. Reasons for this are life-long differences in pay and working time, different pension ages for men and women, and the fact that older women live longer and most often alone.

Source: <https://ageing-equal.org/ageism-and-gender>

Stereotyping, prejudice and discrimination are the main reasons why people's life chances diverge throughout their lives. In many societies, girls' life chances become more limited than boys' when they reach school age, as boys' education is given priority. Girls with disabilities are the least likely to go to school. This is not because they are incapable but because of stigma attached to their gender and disability.

Girls who miss out on education often lose any chance of catching up in terms of employment, income level, decision-making opportunities and status. People belonging to other marginalised groups face a similar experience.

Disability and gender

People of all ages with disabilities face exclusion and discrimination on the grounds of both their gender and their disability.

An estimated 19 per cent of women across the world have a disability, compared with 12 per cent of men. In low- and middle-income countries, women constitute three quarters of people with disabilities. This higher prevalence is often attributed to women's longer life expectancy, the later onset of dementia and the impact of poor maternal health care, although different levels of self-reporting between women and men on disability may also be a factor.

However, gender analysis suggests that the higher prevalence of disability among women than men is a result of social and cultural norms relating to gender, such as systemic exclusion from healthcare and education, poorer nutrition and gender-based violence. For example, conditions such as cataracts that cause loss of sight normally occur later in life. Since women generally live longer than men, more women are affected by cataracts. However, women are less likely to receive sight-saving cataract surgery.

There is evidence that women and girls with disabilities are more likely to face discrimination and exclusion than men and boys with disabilities or people without disabilities. For example, women and girls with disabilities are at a greater risk of being excluded from screening services and diagnosis of health problems. They often feel more inhibited about seeking treatment for an illness because they do not know they have a right to healthcare, they have limited control of household finances, they may be restricted in terms of movement and mobility, or they may not have time, because of their caring responsibilities.

Women and girls with disabilities are more often denied their human rights, than men and boys, or people without disabilities. It is estimated that women with disabilities are twice as likely to experience domestic violence and other forms of gender-based and sexual violence as women without disabilities. They are more likely to experience violence and abuse over a longer period, and to suffer more severe injuries as a result.

Discriminatory attitudes to people with disabilities and women and girls may be due to a number of reasons, ranging from fear of the "other" and cultural beliefs about their value, to unconscious bias. The bridge from beliefs and attitudes to exclusion is power. Across the world, power has largely been maintained in favour of men without disabilities. This power imbalance has allowed inequalities to flourish.



Shocking sexism

For shocking facts on sexism and discrimination against women in the UK, watch Laura Bates' Ted Talk: https://www.ted.com/talks/laura_bates_everyday_sexism?language=en

Section 2: Barriers to inclusion

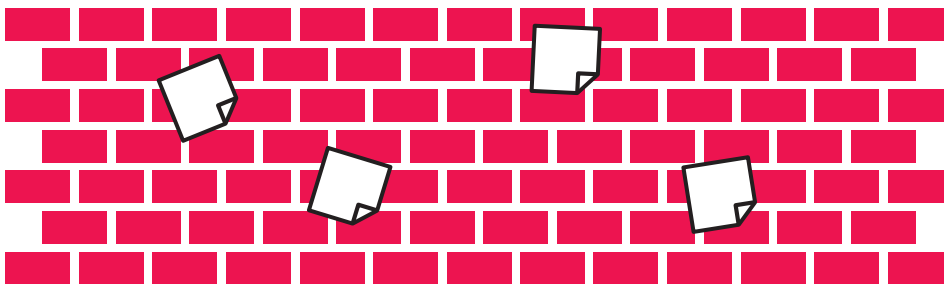
Learning objective: Recognise barriers that prevent people from realising their rights because of stereotyping and discrimination.

Barriers are defined as factors that prevent a person from having full and equal access and participation in society. These can be environmental, including physical barriers (such as the presence of stairs and the absence of a ramp or an elevator) and communication barriers (such as only one format being used to provide information), attitudinal barriers (such as negative perceptions of older people or people with disabilities) and institutional barriers (such as policies that can lead to discrimination against certain groups).

Barrier analysis is a participatory way to identify the barriers that certain groups of people face that prevent them from realising their rights. Different groups of people face different barriers. For example, people with disabilities may face barriers to accessing healthcare services; older women may face barriers to getting a pension.

Barrier analysis supports a rights-based approach. It is based on the assumption that exclusion is the result of a person's rights not being fulfilled. It includes identifying the barriers people face to realising their rights and working to remove these by changing attitudes, behaviour, policies and laws, to rebalance power and resources throughout a community to everyone's benefit. This is in contrast to a needs-based approach that focuses on supporting people to meet their needs. This approach is less likely to overcome barriers necessary to bring about lasting change, that is, changes to institutional systems and social norms.

Visualise a brick wall that separates you from opportunities to play a full part in society. Imagine each brick represents a barrier.



Attitudinal barriers may include:

- believing that women should not travel on public transport on their own
- seeing older people who need help with daily activities as a burden
- believing that girls do not need an academic education or a career as they will get married and stay at home
- perceiving women with disabilities as asexual or promiscuous which makes them targets of sexual abuse
- thinking women are “impure” during menstruation
- believing that men have a right over women’s bodies
- families ceasing to respect men when they grow old
- poor treatment of older people and people with disabilities by healthcare workers
- believing that men should be tough and decisive
- thinking that people with dementia lack the capacity to make decisions.

Institutional barriers may include:

- laws on inheritance and land rights that dispossess women
- social pension policies that disregard unpaid work carried out by women and leave women without enough to live on in their older age
- laws or bank policies that prevent women from opening their own bank accounts
- requiring women show they have written permission from a male family member to travel on public transport
- children of mothers with disabilities being removed from their care
- removing older women from client-facing positions or work as TV presenters because they are considered unattractive
- not allowing deaf people to have driving licences
- discouraging girls from studying subjects such as science and engineering because these are seen as male domains
- not classing domestic violence as a crime.

Environmental barriers may include:

- public transport that is unsafe for women
- poor street lighting that increases the risk of attacks on women
- inaccessible public transport that makes it difficult for older people and people with disabilities to go out
- information not being provided in formats that people with low vision or hearing loss can use
- health centres having no wheelchair access for people with disabilities.

Gender inequality in the law

Only six countries guarantee equal work rights to women and men. The World Bank’s recent *Women, Business and the Law 2020* report measured gender discrimination in 187 countries. It found that only Belgium, Denmark, France, Latvia, Luxembourg and Sweden scored full marks on eight indicators – from receiving a pension to freedom of movement – influencing economic decisions women make during their careers. A typical economy only gives women three-quarters the rights of men in the measured areas.

Source: <https://wbl.worldbank.org>

**Knowledge
box**

- Many barriers to inclusion are connected with each other. Environmental barriers are often linked to institutions, which are made up of individuals. Attitudinal barriers are cross-cutting. They exist almost everywhere.
- Institutional barriers are sometimes subtle. They may seem normal. However, they can have an enormous effect on people's lives.
- There is a link between social norms (common values and beliefs), individual action (such as discrimination based on prejudice and stereotyping) and institutional action (driven by individuals' belief systems and prejudices). Interventions must consider all these factors and how they influence one another.
- Women are more often discriminated against than men. Intersecting characteristics (such as age, gender, ethnicity, disability, sexual orientation or location) can increase barriers to inclusion. Barriers can accumulate over the life course, creating further marginalisation in older age.
- This means that development interventions that aim to be inclusive, but only address certain exclusionary factors, such as age, gender, ethnicity, disability or sexual orientation, will leave many women, such as older women, women with disabilities, indigenous women or lesbians, facing barriers to inclusion based on their gender.
- There are numerous barriers facing large numbers of people. It is tempting to focus on supporting individuals to meet their needs. However, a needs-based approach is less likely than a rights-based approach to overcome barriers necessary to bring about lasting change, that is, changes to institutional systems and social norms.
- Based on a detailed barrier analysis, programme interventions need to find a balance in addressing environmental, institutional and attitudinal barriers. They also need to find a balance between supporting individuals and bringing about broader change (changing social norms).

Exercise: Barriers (table not completed)

Complete this table by putting a cross in the appropriate column(s).

Prejudice and discrimination	Barriers		
	Attitudinal	Environmental	Institutional

Gender

Men are breadwinners			
Women are not promoted over men			
Violence against women and girls is not taken seriously, so cases do not come to court or are thrown out			
Girls are not encouraged to go into higher education			
There are no safe sanitation facilities for women			
Women with disabilities are more likely to have their children taken away from them			

Persons

Persons with disabilities are not allowed to open bank accounts			
Public buildings are not accessible to people with disabilities			
Women with disabilities are abandoned by their partners because divorce/inheritance laws are in favour of men			
A rape victim must visually identify the perpetrator			

Older people

Age-related impairments are seen as normal so they are given low priority by health and rehabilitation services			
Older women are removed from public-facing positions because they are considered unattractive			
People above a certain age cannot take out insurance			
Widows have no right to inherit land or property			
Surveys and research studies only use data on people aged 15–49			
Older people, especially women, are thought incapable of learning new things or using modern technology			

Exercise: Barriers (completed exercise)

The answers are given below.

Prejudice and discrimination	Barriers		
	Attitudinal	Environmental	Institutional

Gender

Men are breadwinners	X		
Women are not promoted over men			X
Violence against women and girls is not taken seriously, so cases do not come to court or are thrown out	X		X
Girls are not encouraged to go into higher education			X
There are no safe sanitation facilities for women		X	
Women with disabilities are more likely to have their children taken away from them	X		

Persons

Persons with disabilities are not allowed to open bank accounts			X
Public buildings are not accessible to people with disabilities		X	X
Women with disabilities are abandoned by their partners because divorce/inheritance laws are in favour of men			X
A rape victim must visually identify the perpetrator			X

Older people

Age-related impairments are seen as normal so they are given low priority by health and rehabilitation services	X		X
Older women are removed from public-facing positions because they are considered unattractive	X		X
People above a certain age cannot take out insurance			X
Widows have no right to inherit land or property			X
Surveys and research studies only use data on people aged 15–49			X
Older people, especially women, are thought incapable of learning new things or using modern technology	X		

Quiz

Try this quiz to check what you have learnt from this module. Answers at the end.

1. What type of discrimination are these:

a. A bus company only allows men to be recruited as drivers.

- Direct discrimination
- Indirect discrimination
- Positive discrimination

b. Only close-shaven men can work for the company, whatever their religion.

- Direct discrimination
- Indirect discrimination
- Positive discrimination

c. A company is recruiting only women to senior management positions to improve the gender balance in the team.

- Direct discrimination
- Indirect discrimination
- Positive discrimination

2. What kind of barriers do the women in the following stories face (you can tick more than one):

a. The health system focuses on maternal health. However, the health effects of childbearing continue to be felt by women in their older age. Many older women suffer from fistula or prolapse, but only limited services are available for treating these.

- Environmental barriers
- Attitudinal barriers
- Institutional barriers

b. Nyamizi was accused by a neighbour of bewitching her child. She was brutally attacked but her attacker was never brought to justice.*

- Environmental barriers
- Attitudinal barriers
- Institutional barriers

*Read Nyamizi's full story on the HelpAge website: <https://www.helpage.org/newsroom/life-stories/rights/nyamizi-73-tanzania/>

3. An older woman is less likely to be offered a job as a TV presenter than a younger woman.

- True
- False

4. In many societies, girls are less likely than boys to go to school. This will affect:

- Their chance to choose their future partner
- Their chance to get a job
- Their chance to stay healthy
- All of the above

5. A needs-based approach works at:

- Individual / family / community level
- Government / policy / religious leadership level

6. A needs-based approach is often concerned with:

- Future needs
- Immediate needs

7. A rights-based approach explores barriers people face to realise their:

- Dreams
- Rights
- Ambitions

8. A rights-based approach aims to bring about:

- Small changes
- Immediate change
- Systemic change

Answers: 1a Direct discrimination; 1b Indirect discrimination (some religions such as Sikhism require men to have a beard); 1c Positive discrimination; 2a Institutional, attitudinal and institutional; 2b Attitudinal and institutional; 3 True; 4 All of the above; 5 Individual / family / community; 6 Immediate; 7 Rights; 8 Systemic change

Module 3

Gender analysis and mainstreaming

Section 1: Gender mainstreaming principles

Learning objective: Understand the key principles of gender mainstreaming.

Gender mainstreaming means integrating a gender equality perspective in policies, programmes and projects. Women, men and people of other genders have different needs and circumstances, including unequal access to and control over power, resources, human rights and institutions. The aim of gender mainstreaming is to take into account these differences when designing, implementing and evaluating policies, programmes and projects, so that they benefit women, men and people of other genders and do not increase inequality but enhance gender equality. Gender mainstreaming aims to solve sometimes hidden gender inequalities. It is therefore a tool for achieving gender equality.

While gender mainstreaming is essential for securing human rights and social justice for women as well as men, it is increasingly recognised that incorporating gender perspectives into different areas of development is necessary to achieve other social and economic goals.

Gender mainstreaming means putting gender equality at the centre of your work. It means considering gender in, for example, policy decisions, planning, budgeting, and organisational structures and operations.



Elements of gender mainstreaming include:

In projects (or programmes):

- Collect and analyse sex-, age- and disability-disaggregated data at all stages of a programme, starting with baseline data (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance).
- Use findings from a gender and age analysis to inform the outcomes and activities of the project.
- Select indicators that reflect the anticipated changes and benefits for both women and men.
- Include specific outcomes on gender equality in your monitoring and evaluation framework (if the project is gender-transformative).
- Design and implement the project in a way that challenges existing gender norms (if the project is gender-transformative).
- Encourage meaningful consultation with and active participation of people of all gender identities at the design, planning, implementation, monitoring and evaluation stages of the programme.
- Fully integrate gender and age analysis, and report on gender-related impacts, in project evaluations and reviews.
- Formalise the requirement for partners to mainstream gender in MOUs.

In advocacy interventions:

- Set advocacy objectives that respond to issues identified from gender and age analysis. Your advocacy objectives might not be gender-transformative but it is recommended that they are, at the very least, gender-sensitive.
- Include women, men and organisations with influence on issues around gender equality in your target audience.

- Consider the level of awareness of the audience you are targeting in relation to any gender issues you have identified.
- Conduct an informal assessment and/or intelligence-gathering regarding gender-sensitivity of partners, including network members.
- Collect and analyse sex-, age- and disability-disaggregated data throughout the advocacy cycle (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance). Make this data publicly available, with consideration of data protection issues, to encourage its uptake and re-use by key stakeholders.
- Ensure advocacy outputs reflect findings from gender and age analysis.
- Articulate advocacy asks and messaging to:
 - be inclusive of needs (practical and strategic), perspectives, rights and challenges faced by women and men and promote gender equality
 - challenge stereotypes and represent the diversity of roles of women and men in both content and visuals
 - ensure voices of women and men are included in advocacy messaging and language is gender sensitive
 - avoid any gender stereotyping in the language used.
- Design advocacy outputs, including visuals and photos, to be gender balanced.
- Take into account any gender-specific patterns of behaviour or barriers in relation to accessing information in disseminating advocacy outputs (e.g. access to mobile devices newspapers, etc).
- Engage people with influence on gender issues in the dissemination plan.
- Identify gender-sensitive or gender-transformative progress on the part of audiences targeted through advocacy activities.

In organisations:

- Include a gender and age analysis in country and regional business plans and Theories of Actions.
- Identify an active gender focal point in each office.
- Train existing staff on gender equality and induct new staff in HelpAge's Gender equality policy within three months of starting.
- Set senior managers a performance objective on gender mainstreaming.
- Include progress on gender mainstreaming in annual reports and present a summary each year to the trustees.
- Collect, analyse and report on sex-, age- and disability-disaggregated data on recruitment, promotion and retention of staff (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance).
- Ensure a gender balance of selection panels and equality training for selection panel members in recruitment policies and procedures.
- Provide equal pay for all staff performing the same roles.
- Set gender equality targets for senior management positions.
- Provide leadership training opportunities for staff regardless of their gender.
- Have policies on sick leave, childcare and maternity/paternity leave.
- Have policies on protection from sexual harassment, bullying and discrimination.

For more information, please see HelpAge's Minimum standards for gender mainstreaming. This includes a gender marker for assessing how gender-sensitive a programme is. It also includes a recommended set of organisational structures to support gender mainstreaming.

For advocacy interventions, please see HelpAge's Gender analysis: a checklist for producing advocacy outputs. This includes a set of gender mainstreaming recommendations for all stages of the production process. These resources are listed in the Annex.

Gender mainstreaming does not mean adding on “something for women” to an existing activity, or ensuring women form a certain percentage of participants, such as 50 per cent of those taking part in training or a project.

Gender mainstreaming may mean changing your goals, plans and actions to ensure that both women and men can influence, participate in and benefit from development interventions. It may require changes to organisational structures, procedures and cultures to create environments that truly help to promote gender equality.

Section 2: Gender analysis

Learning objective: Understand gender analysis areas of enquiry and questions.

Gender analysis is a tool for examining the differences between the roles that women and men play, the different levels of power they hold, their differing needs, constraints and opportunities, and the impact of these differences on their lives. Where data broken down by sex and age reveals gender differences and inequalities, gender analysis explores the reasons behind these differences and helps us understand the impact of our work on older women and men, and older people of other genders.

A gender and age analysis provides qualitative information on gender differences and inequalities, and how they change across the life course. It helps us understand specific issues faced by older women and men, and older people of other genders, and how gender norms, roles and relations change with age.

Gender analysis helps us to design projects (or programmes) and advocacy interventions that consider gender issues and contribute to gender equality. It should continue to be carried out at different points in the project and advocacy cycles.

Gender analysis has different components. Broadly speaking, it looks at:

- Who does what?
- Who has what? Who can use what and who has control over it?
- How widespread is violence and what is the risk of experiencing it?
- Who has information about what? Who do they share this information with?
- Who participates at what level and for what purpose?
- What are the policies, laws, norms and structural constraints? Who benefits from these?

Areas of enquiry

Key areas of investigation in a gender analysis are:

- Roles and responsibilities (division of labour)
- Access to and control over resources
- Bodily autonomy, violence and safety
- Knowledge and information
- Aspiration and participation
- Duty-bearers and institutions

The danger of a single story

To learn more about diversity, how to challenge prejudices, and understand how each individual has a unique experience, watch Chimamanda Ngozi Adichie’s Ted Talk: https://www.ted.com/talks/chimamanda_ngozi_adichie_the_danger_of_a_single_story?language=en

Areas of enquiry and questions for gender analysis

Areas of enquiry	Questions
<p>Roles and responsibilities (division of labour)</p> <p><i>Power to</i></p>	<p>Who does what?</p> <ul style="list-style-type: none"> • What do women, men and people of other genders do (tasks/chores responsibilities)? • Where do they carry out these activities (in the house, community, workplace or an institution)? • How often do they do them (daily and seasonal patterns)? How long do they spend? • Has anything changed since the disaster/conflict/crisis? <p><i>Remember: productive, reproductive and community roles</i></p>
<p>Access to and control over resources</p> <p><i>Power to</i> <i>Power over</i> <i>Power with</i></p>	<p>Who has what? Who can use what and who has control over it?</p> <ul style="list-style-type: none"> • What assets, resources and opportunities do women, men and people of other genders have access to? • Who has control over these? • Who receives an income (inside and outside the household)? Who can decide what to do with the money? • Who can inherit land or property and who decides on this? • How are budgets allocated and spent? <ul style="list-style-type: none"> – at household level? – at community level? • Who is allocated public resources? Who receives these resources? <ul style="list-style-type: none"> – at household level (such as social pensions, benefits, services, humanitarian assistance) – at community level (such as budget allocation and expenditure on services and infrastructure, support during or after a disaster/conflict/crisis) • Who has social capital (such as social networks and support networks)? • Has this changed since the disaster/conflict/crisis?
<p>Bodily autonomy, violence and safety</p> <p><i>Power over</i> <i>Power to</i> <i>Power within</i></p>	<p>How widespread is violence and what is the risk of experiencing it?</p> <ul style="list-style-type: none"> • Has access to employment outside the house increased the risk of abuse or violence at home, at work or in transit to or from the workplace? • What are the occupational health risks (such as during menopause or in relation to a disability)? • What are the risks of abuse or violence for women, men or people of other genders who are dependent on a carer or have lost their legal capacity? • What protection risks are there during a disaster/conflict/crisis, including risk of gender-based violence? • Have risks and power dynamics changed since the disaster/conflict/crisis?

continued over

Areas of enquiry	Questions
<p>Knowledge and information</p> <p><i>Power over</i> <i>Power to</i> <i>Power within</i> <i>Power with</i></p>	<p>Who has information about what? Who do they share this information with?</p> <ul style="list-style-type: none"> • Who knows about government policies and programmes and how to access them (such as social protection)? • Who knows about institutional policies and programmes (such as equal opportunities in recruitment, wage parity, sexual harassment prevention, complaints and grievance mechanisms)? Are these shared with and explained to everyone? • Who knows how to access services (such as health, income, legal, gender-based violence support services, humanitarian assistance)? • Who is a member of, or has access to social or economic networks, unions or humanitarian committees to share information and knowledge and have mutual support? • How does this information give someone power and status? • Has the place for obtaining information and sharing knowledge changed since the disaster/conflict/crisis?
<p>Aspiration and participation</p> <p><i>Power to</i> <i>Power within</i> <i>Power with</i></p>	<p>Who participates at what level and for what purpose?</p> <ul style="list-style-type: none"> • Do all women, men and people of other genders, have the same choice of activities (such as training or volunteer opportunities)? • Do women, men and people of other genders have the freedom to access public spaces and participate in project activities? Can they make decisions and express their opinions? • Are women, men and people of other genders supported to participate (such as through safe spaces for everyone to speak, accessible and inclusive venues, consideration of time constraints or caring responsibilities, adaptation of learning styles, measures to build self-confidence)? • Who participates in decision-making at household and community levels? What kind of decisions (level of importance and influence, opportunities for planning projects)? • Have decision-making structures changed since the disaster/conflict/crisis?
<p>Duty bearers and institutions</p> <p><i>Power over</i> <i>Power to</i> <i>Power with</i></p>	<p>Who benefits?</p> <ul style="list-style-type: none"> • What are the laws, policies, norms and structural constraints and who benefits from the status quo? • How do religious or political groups set rules and policies or laws that maintain situations for their own benefit rather than for everyone (such as division of labour)? • Has this changed since the disaster/conflict/crisis? Have policies been revised, updated or abandoned? • How are organisations responding to gender issues (such as collecting and using data broken down by sex, age and disability, staff training, recruitment, resourcing, policies, information management, communication)? • Who benefits at individual, family, community and institutional levels? • Is the distribution of benefits different from before the disaster/conflict/crisis?

Gender-based violence in Cambodia

The needs assessment of an international organisation working in partnership with a Cambodian organisation found a high prevalence of domestic violence against older women with disabilities. Factors that contributed to the violence included:

- poverty
- high alcohol consumption by male family members
- patriarchal social norms in which women were perceived as inferior and subordinate to men
- disabilities in older women which further decreased women's status and power.

The main components of the project focused on:

- livelihood activities
- awareness-raising on gender inequality and the rights of women, particularly women with disabilities, in the families and the communities.

For empowerment and sustainability, the project sought to engage older women with disabilities as volunteers to work with families and communities. Their role was to identify abuse, counsel abusive partners, and campaign in the communities for more awareness and support.

However, it turned out to be difficult to recruit as many older women with disabilities as anticipated. Many had no time to spare from household responsibilities, including caring for family members, pursuing income-generating activities and doing other voluntary work. As an alternative, the project filled the volunteer positions with older men with disabilities.

To some degree, this was a positive move. Though not planned, it allowed men to counsel other men on alcoholism and violence. This would have been more difficult for women to do. However, it also required additional safeguarding and protection measures to be put in place to protect the safety of women, and provide considerably more training and monitoring of the men to prevent the empowerment aspect of women being lost by men's involvement.

A gender analysis would have highlighted the division of labour between women and men (who does what). This could have informed the design of the project.

Project development should be based on the recognition that women and men:

- have different legal and customary rights
- have control of and access to different resources
- have different jobs within the household
- allocate their time differently
- have different priorities and goals.

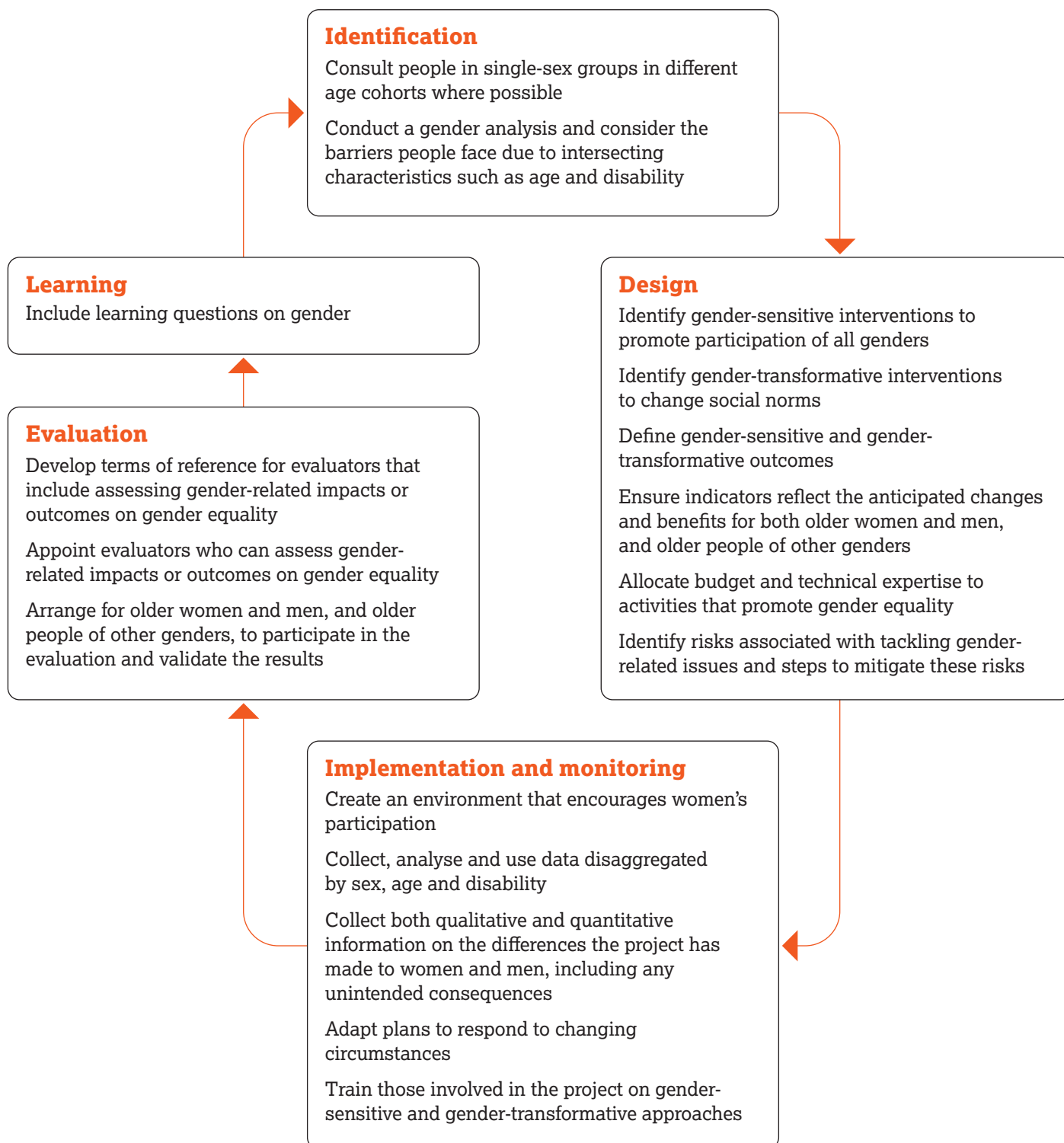


**Learning
points**

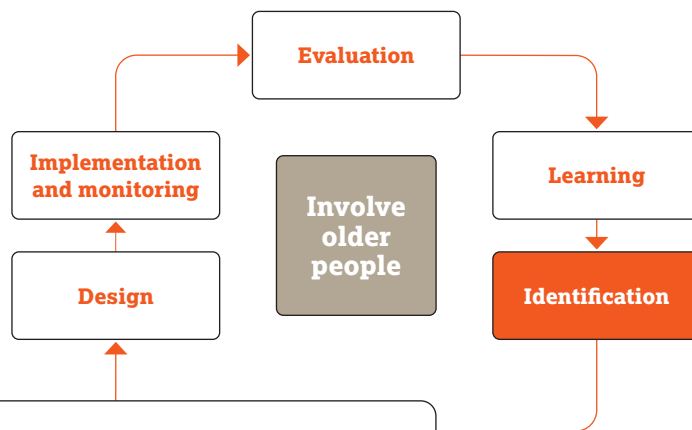
Section 3: Applying gender mainstreaming in projects

Learning objective: Know how to apply gender mainstreaming in projects (or programmes).

A gender and age analysis should be carried out at the earliest stage of the project cycle to assess the current situation. It should be an iterative process (repeated at every stage of the cycle as more data is continually collected).



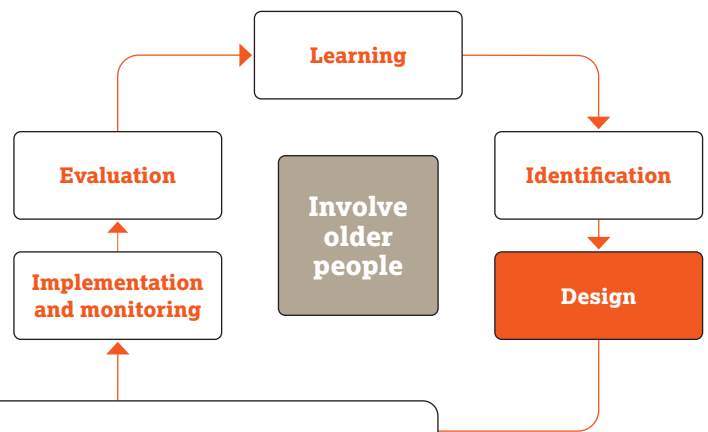
Gender mainstreaming at different stages of a project



Identification

Gender-sensitive or gender-transformative

- Disseminate information about the project widely, including working with older people's associations, women's rights organisations or disabled people's organisations to identify older women and men, and older people of other genders (including those with disabilities) to participate in consultations.
- Conduct a needs assessment. This should include a gender analysis at individual, household and community level (which should explore people's intersecting identities and whether these increase the barriers they are facing). Compare the following for older women and men, and older people of other genders:
 - confidence and autonomy
 - skills and training needs
 - poverty status including allocation and control of resources
 - risk of domestic violence
 - household and unpaid care responsibilities
 - aspirations for paid work (e.g. type of work, shift patterns)
 - healthcare needs
 - infrastructure needs (e.g. childcare, transport).
- Include a risk assessment to mitigate the risks for women in participating in the needs assessment, especially when discussing gender-based violence. Ensure:
 - Consultations are held with single-sex groups in different age cohorts where possible.
 - Women can safely express their opinions.
 - Consultation venues and timing are such that women can reach them safely. Budgets include communication support for participants with disabilities or low literacy.



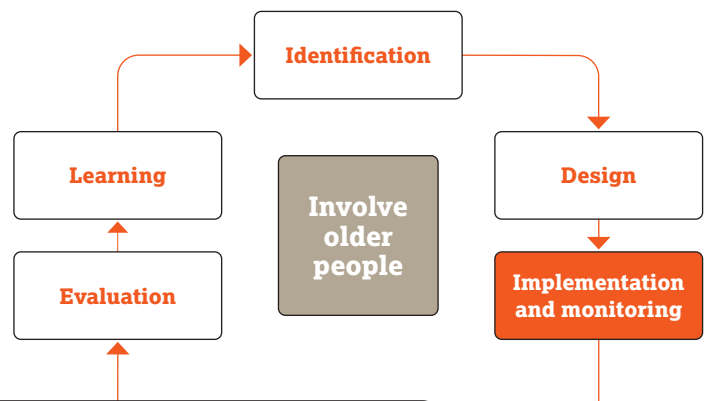
Design

Gender-sensitive approach

- Gender and age analysis inform the outcomes and activities of the project.
- Plan activities that consider:
 - older women’s and men’s time spent on household activities and work outside the home, including time spent travelling to work or other places, availability, cost and accessibility of transport, accessibility of infrastructure such as health centres.
 - older women’s educational level, skills and confidence in relation to older men’s.
- Select indicators that reflect the anticipated changes and benefits for older women and men, and older people of other genders.
- Fully integrate a gender and age analysis into project evaluations and reviews, and incorporate learning questions into the monitoring, evaluation and learning (MEAL) framework.
- Budget and allocate resources to activities that promote gender sensitivity.
- Ensure reporting requirements include references to gender-related impacts.

Gender-transformative approach – additional requirements

- Define specific outcomes on gender equality.
- Include a gender expert in the design team to advise on gender mainstreaming. Budget for a gender expert in the project team to provide technical advice on gender mainstreaming during implementation.
- Include project activities that seek to promote gender equality at the individual, relationship, community and institutional levels. For example, activities that build older women’s autonomy, self-esteem and social networks, engage men and boys in changing attitudes and norms, and encourage the equitable division of labour and decision-making.
- Design the project to challenge existing gender norms:
 - Address social expectations about older women’s and men’s roles and status in the home and community, and support participation in project activities.
 - Address institutional barriers e.g. in relation to policies and practices regarding access to social protection or healthcare.
- Plan and budget for a possible backlash against older women and men and older people of other genders involved in the project (in relation to championing gender equality). Identify steps to mitigate the risk.
- Select indicators to measure changes in gender norms, attitudes and behaviours (including violence, abuse and neglect) in the proposed outcomes.
- Cost and allocate resources to activities that promote gender equality beyond the project period.



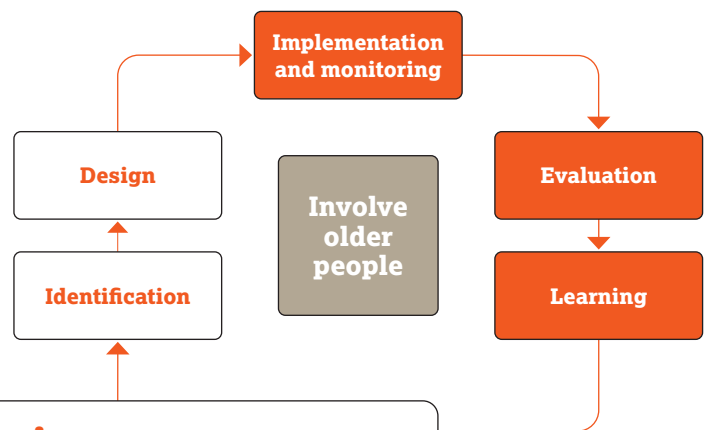
Implementation (including project inception)

Gender-sensitive approach

- Develop a gender strategy to guide how the project is implemented and monitored.
- Make expectations and tasks related to gender clear in project team members' terms of reference and job descriptions. Where appropriate, include gender-related qualifications in person specifications.
- Conduct capacity assessments to assess project team members' capacity to adopt a gender-sensitive approach.
- Deliver gender training at the start the project and refresher training annually, including training staff on gender mainstreaming and analysis.
- As far as possible, ensure a gender balanced project team.
- Include gender-related qualifications in person specifications for consultants and short-term staff.
- Train data collectors on gender-sensitive approaches, including how to handle any disclosures of abuse.
- Identify safe, confidential and appropriate referral pathways (and regularly update information), for survivors of violence, abuse and neglect. Ensure all staff are trained on making referrals and have written information about where to refer survivors for care and support.

Gender-transformative approach – additional requirements

- Include a gender expert in the project team to provide technical oversight of gender mainstreaming and analysis.
- Monitor how far the project is adhering to the project's gender strategy (by arranging regular meetings to assess progress).
- Develop gender-sensitive workplans. For example:
 - Ensure women can participate in project activities (considering timing, location, etc)
 - Regularly monitor the situation of older women and older men participating in the project and the effect that their participation is having on them. For example, what is the effect on unpaid household work carried out by older women themselves or by other family members (such as their daughters or granddaughters, if they are having to take over some jobs), access to public services, and changes in their relationships with other members of the household?
- Obtain feedback on project processes.
- Put in place a range of accessible feedback and complaints mechanisms that allow women to safely put forward their concerns without having to be asked.



Monitoring, evaluation and learning

Gender-sensitive approach

- Fully integrate a gender and age analysis into project evaluations and reviews, and incorporate learning questions into the monitoring, evaluation and learning (MEAL) framework.
- Disaggregate monitoring data by sex, age and disability at a minimum.
- Include sex, age and disability data in reporting templates.
- Collect data from older women and men, and older people of other genders (with cross reference to age cohorts recommended by HelpAge), including those with different disabilities.
- When collecting data, arrange for separate discussions or interviews to be conducted by a facilitator or interviewer of the same gender.
- Ensure that data is consistently recorded with a code for sex, age and disability together.
- Use a consistent index for disaggregating disability data (i.e. the Washington Group questions).
- Analyse and report on the different outcomes for those targeted by the project, referring to their sex, age and disability status.
- Include a gender expert on the evaluation team.
- Ensure terms of reference for the evaluation explicitly addresses gender (in research questions, data disaggregation requirements, ethics and stakeholders to consult).
- Consult project participants of different ages (with cross reference to age cohorts recommended by HelpAge), genders and disabilities.
- Develop evaluation questions that ask:
 - How consistently has a gender and age analysis been carried out throughout the project, and how have the results been used to alter the project?
 - How far have older women and men and older people of other genders participated in the project?
 - How far has the project contributed to changes and benefits for older women and men, and older people of other genders?
- Include learning questions about gender-sensitive interventions.

Gender-transformative approach – additional requirements

- Develop evaluation questions that show how far the project has contributed to gender equality.
- Include learning questions about activities to promote gender equality. Ask what barriers to inclusion are still being experienced by people at risk of marginalisation and why this is.
- Allow participants of different genders the opportunity to validate learning outcomes.

Political representation

In partnership with local older people's associations in a country in South Asia, an international organisation designed and implemented a project to increase the political representation of older people.

Women and men over 50 years old were invited to take part in training as candidates to stand in elections to serve on various community development committees. The initial training sessions were attended by almost equal numbers of women and men. However, as time went on, the numbers of women began to decline. Later in the project, women also dropped out of small working groups set up to prepare election processes and campaign messages.

In the event, only a small number of women stood for election and no woman was elected. Women only participated in committees that dealt with primary healthcare, hygiene or nutrition services, and subsistence farming methods.

What happened? A gender analysis would have pointed to the following challenges:

- Working groups were scheduled by mentors to suit their own availability. This was usually in the evening when women had household/reproductive commitments or did not feel comfortable/confident about going out.
- The venues and timing of campaign planning sessions made it difficult for women to reach them safely on their own.
- Committees focusing on reproductive themes were more accessible to women. Women were therefore more ready to join them than committees that seemed to be aimed towards men.
- Men were usually more outspoken and dominant than women, giving women fewer opportunities to speak and be listened to.
- Women needed someone to accompany them on the campaign trail (for assistance and/or protection). However, there was not enough in the budget for this. Men were more flexible and independent. Budgets were mostly allocated by men who did not plan for women to be accompanied.



Section 4: Applying gender mainstreaming in fundraising and advocacy

Learning objective: Know how to apply gender mainstreaming in fundraising and advocacy.

Proposal development process

- Project participants should be involved throughout the proposal development process.
- The funding proposal should be based on the situational analysis carried out at the start of the project cycle. This should include a gender analysis and consideration of the barriers people face due to intersecting characteristics such as age and disability.
- The donor's position on gender needs to be explored. Does the donor expect a gender-sensitive or gender-transformative approach? Are they willing to provide technical and financial support to ensure a gender-sensitive or gender-transformative approach? If they do not expect to support interventions promoting gender equality, could they be persuaded to provide extra financial support to include a gender-related component?
- The findings from the situational analysis should be incorporated into the concept note, clearly and consistently, differentiating findings by gender, age, disability and other relevant identities.
- The theory of change and funding proposal need to identify activities that promote gender equity and/or gender equality. They need to include indicators to show how far this has been achieved, and budget allocations to support this.

See HelpAge's Minimum standards for gender mainstreaming (listed in the Annex) for more details.

Budget considerations

A gender-sensitive budget breaks down resource allocation by gender. This helps to create more gender-equitable expenditure.

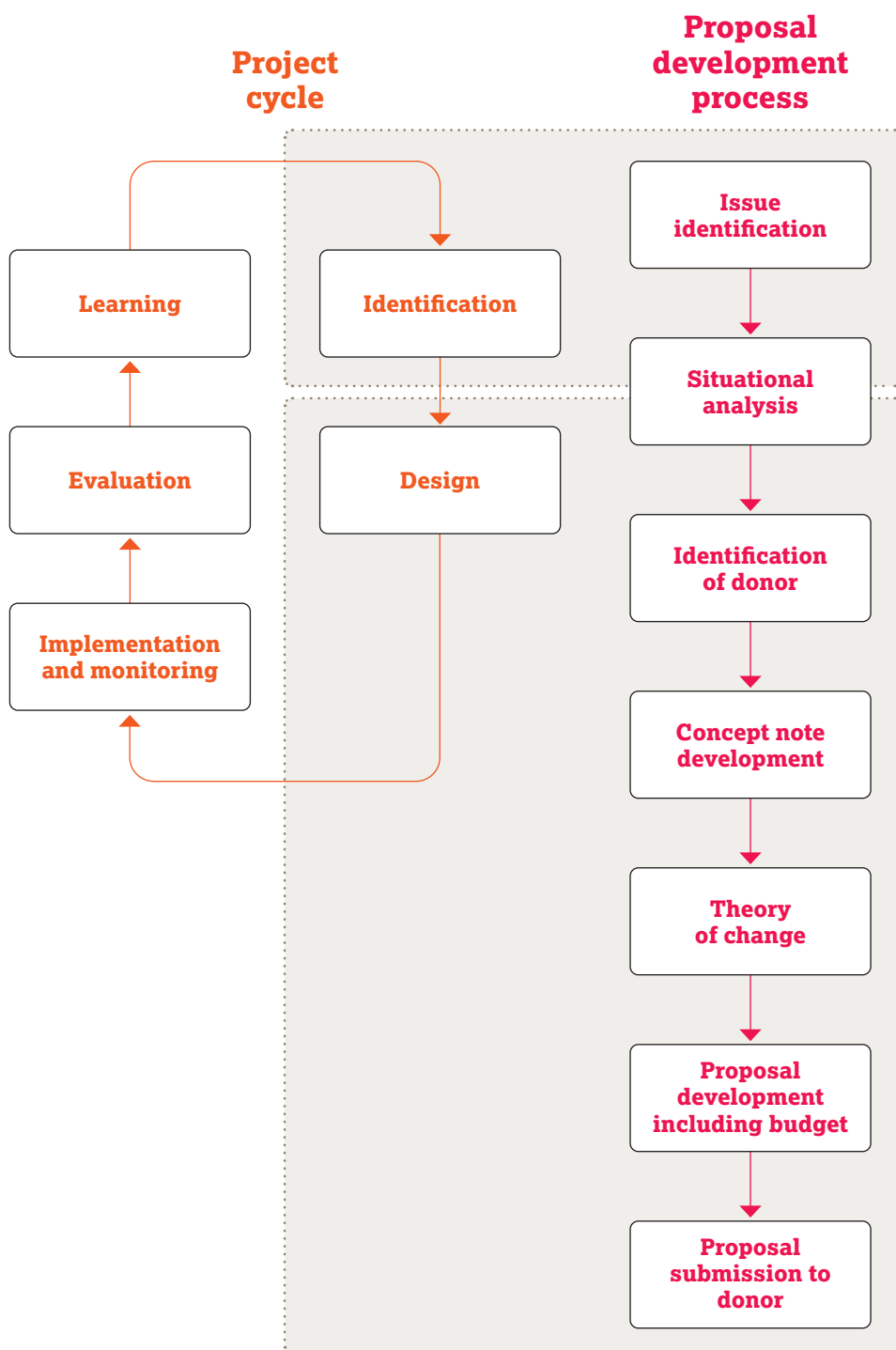
A gender-sensitive budget does not simply divide money and resources 50–50 between women and men. A 50–50 division may be equal, but is not necessarily fair.

A gender-sensitive budget uses sex-disaggregated data to show how many people of which sex will be employed or have a role in the delivery of the project, what kind of jobs they will do and what they will earn, who will receive training, who will decide how resources are allocated, and so on.

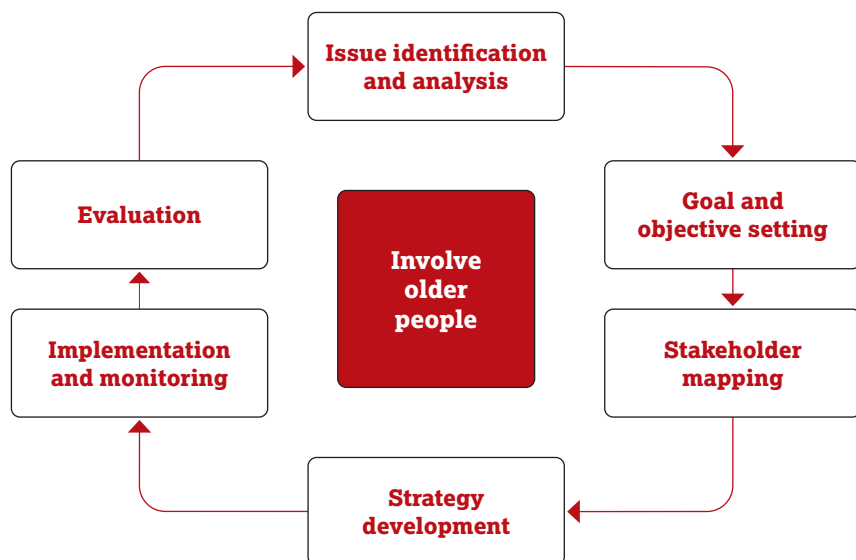
Indicators for gender-sensitive budgeting include:

- gender balance of project team (staff, service providers and volunteers)
- share of expenditure on activities designed to meet the priorities of older women and men, and older people of other genders, such as promoting rights, political participation, representation in the media and participation in civil society organisations
- gender-sensitive support to community organisations, such as grants and technical support to women's groups
- gender balance in training.

The funding proposal is developed during the identification and design stages of the project cycle



Advocacy cycle



The advocacy cycle can start at almost any stage of the project cycle, depending on organisational policy and advocacy opportunities. However, it may be best to carry out advocacy when you have obtained data and evidence to support your advocacy messages.

- Set advocacy objectives that respond to issues identified from gender and age analysis. Your advocacy objectives might not be gender-transformative but it is recommended that they are, at the very least, gender-sensitive.
- Include women, men and organisations with influence on issues around gender equality in your target audience.
- Consider the level of awareness of the audience you are targeting in relation to any gender issues you have identified.
- Conduct an informal assessment and/or intelligence-gathering regarding gender-sensitivity of partners, including network members.
- Collect and analyse sex-, age- and disability-disaggregated data throughout the advocacy cycle (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance). Make this data publicly available, with consideration of data protection issues, to encourage its uptake and re-use by key stakeholders.
- Ensure advocacy outputs reflect findings from gender and age analysis.
- Articulate advocacy asks and messaging to:
 - be inclusive of needs (practical and strategic), perspectives, rights and challenges faced by women and men and promote gender equality
 - challenge stereotypes and represent the diversity of roles of women and men in both content and visuals
 - ensure voices of women and men are included in advocacy messaging and language is gender sensitive
 - avoid any gender stereotyping in the language used.
- Design advocacy outputs, including visuals and photos, to be gender balanced.
- Take into account any gender-specific patterns of behaviour or barriers in relation to accessing information in disseminating advocacy outputs (e.g. access to mobile devices newspapers, etc).
- Engage people with influence on gender issues in the dissemination plan.
- Identify gender-sensitive or gender-transformative progress on the part of audiences targeted through advocacy activities.

See HelpAge's Gender analysis: a checklist for producing advocacy outputs (listed in the Annex) for more details.

Gender-sensitive data

Gender-sensitive data is data broken down by sex or gender. It involves collecting quantitative and qualitative data on women, men and people of other genders separately, as well as data on other characteristics including age (using HelpAge's recommended age cohorts), gender, ethnicity, disability, sexual orientation or location, as far as relevant.

Collecting gender-sensitive data:

- enables you to compare the different circumstances of women, men and people of other genders
- is necessary to monitor the different impacts for women, men and people of other genders.



Gender-sensitive indicators

Gender-sensitive indicators reflect the anticipated changes and benefits for women, men and people of other genders. They take into account gender relations to show:

- whether there has been any change in the status of women, men or people of other genders
- how much change there has been in the status of women, men or people of other genders
- whether the needs of women, men and people of other genders have been met equitably

Gender-sensitive indicators relating to the project goal and objectives should be informed by a gender analysis.

Quantitative and qualitative indicators

Indicators can be quantitative or qualitative. Both types should be used.

Quantitative indicators measure quantity. They are represented by numbers. They are considered objective (not dependent on anyone's opinion). They can be checked. For example:

- overall numbers of older women and men, and older people of other genders participating in the project
- numbers of older women and men, and older people of other genders involved in advocacy campaigns
- numbers of older women and men, and older people of other genders in community-based leadership roles
- numbers of older women and men, and older people of other genders who are literate
- numbers of older women and men, and older people of other genders accessing social pensions through the project.

Quantitative indicators can also be used to measure changes in attitudes or behaviour.

For example:

- percentage of men who think domestic violence is acceptable
- percentage of community leaders who believe in witchcraft
- percentage of older women who think that early marriage is acceptable
- percentage of older men who share household chores equally with their wife or partner.

Quantitative indicators are used to measure quantity. They are represented by numbers. They are considered objective (not dependent on anyone's opinion). They can be checked.



Qualitative indicators are used to measure people's responses or experience of a particular issue. They are used to measure the impact of an intervention. They look at aspects of the project that cannot be measured by numbers, such as people's attitudes, beliefs and behaviour. They are usually subjective (depend on someone's opinion). For example:

- the level of acceptance of female community leaders
- the level and type of financial decision-making in families
- the level and type of female participation in organisational decision-making
- the level of gender equality in specific laws or policies, e.g. land rights, inheritance and labour laws
- the level of violence, abuse and neglect against older women, including sexual, physical, emotional and financial abuse
- the level of access to and quality of health services for older women and men, and older people of other genders with disabilities
- quality of psychosocial support to older women and men, and older people of other genders, with and without disabilities, in refugee or internally displaced people's camps
- the ability of older women and men, and older people of other genders to exercise their voice in different contexts and whether their voices are heard by decision makers.

Qualitative indicators are used to measure people's responses or experience of a particular issue. They are used to measure the impact of an intervention. They look at aspects of the project that cannot be measured by numbers, such as people's attitudes, beliefs and behaviour. They are usually subjective (depend on someone's opinion).



You can use a scale system to determine the levels. For example, you could ask people to agree or disagree with a statement on a scale of 1 to 5 (1: strongly disagree; 2: disagree; 3: neither agree nor disagree; 4: agree; 5: strongly agree).

How to develop indicators

Keep in mind that indicators:

- should be developed with women, men and people of other genders
- must be relevant to the needs of women, men and people of other genders
- must be sex-, age- and disability-disaggregated
- should be both quantitative and qualitative
- should be clearly defined so that everyone understands what they are
- should remain constant, so that all the data collected, can be interpreted in the same way, no matter who has collected it
- should allow for comparison and thus measurement of change over time
- should measure things it is possible for the project to change.



Section 5: Applying gender mainstreaming in organisations

Learning objective: Understand how to support gender mainstreaming in an organisation.

Organisational gender mainstreaming means putting gender equality at the centre of your work. It means considering gender in, for example, policy decisions, planning, budgeting and institutional structures and operations. It may require changes to the organisation's structure, procedures and culture to create an environment that truly helps to promote gender equality.

There are four ways of promoting gender equality within an organisation:

- Build political will
- Strengthen technical capacity
- Promote a positive organisational culture
- Institute mechanisms for individual, programmatic and organisational accountability.

Political will is a concept which highlights the ways in which leaders use their position of power to communicate and demonstrate their support, leadership, enthusiasm for and commitment to working towards gender equality in the organisation. These may include:

- Adopting and ensuring the implementation of an organisational policy that supports commitment to gender equality
- Reinforcing that commitment through organisational strategy processes and communications
- Demanding new procedures for recruiting, hiring and promoting staff
- Establishing ways to measure and recognise progress.

Technical capacity is the ability, qualifications and skills that individuals in an organisation need to apply gender mainstreaming to projects (or programmes) and organisational processes. These may include:

- Moving beyond awareness to application
- Facilitating changes to organisational procedures as well as strengthening individual skills
- Contributing to an ongoing community of learning among staff e.g. through global thematic learning groups.

Organisational culture refers to the norms, customs, beliefs and codes of behaviour that make up an organisation's culture. These may support or undermine gender equality. They influence how people relate to each other, what ideas are acceptable, how people are expected to behave and what types of behaviours are rewarded. Changing organisational culture may include:

- Starting where there is momentum and energy and building from there
- Documenting and rewarding progress
- Creating a climate of open communication
- Prohibiting forms of dominance and subordination which inhibit full contribution.

Accountability means the mechanisms by which an organisation measures how far it is "walking the talk" in terms of mainstreaming gender equality in its projects and organisational structure. These may include:

- Rewarding individuals or teams promoting gender equality
- Setting annual targets for implementing the organisational gender strategy
- Including responsibility for promoting gender equality in job descriptions, workplans and performance assessments.

Gender equality capacity assessments

When assessing the technical capacity of individual staff, find out what they think about promoting gender equality. Assess whether they have the necessary attitude and skills to promote gender equality into their day-to-day work.

Find out what they know about concepts such as gender equality and women's empowerment. Check how familiar they are with organisational policies and procedures for promoting gender equality, such as HelpAge's Gender equality policy, Minimum standards for gender mainstreaming, and recruitment processes (see the Annex for more details). Also find out if they have the necessary skills and knowledge to implement these.

You can use questionnaires, surveys, individual tests, focus group discussions and interviews to assess people's capacity to promote gender equality.

A capacity assessment at organisational level means considering the policies, strategies and procedures that are in place to enable an organisation to fulfil its commitment to gender equality. The International Labour Organization's participatory gender audit⁶ describes a systematic, participatory and gender-sensitive methodology for analysing how gender is being mainstreamed within an organisation. Assessing organisational gender equality capacity is a useful step towards improving the organisation's capacity to promote gender equality.

Aspects of the organisation to assess include:

- Strategic planning
- Programming and implementation (including gender-transformative approaches)
- Budgeting
- Knowledge management
- Communication
- Monitoring and evaluation
- Partnerships
- Advocacy activities
- Leadership

You can do a gender analysis of each aspect, using these areas of enquiry to find out about:

- Roles and responsibilities (division of labour)
- Access to and control over resources
- Bodily autonomy, violence and safety
- Knowledge and information
- Aspiration and participation
- Duty bearers institutions/benefits

Use these questions to find out:

- Who has which positions?
- Who is actively participating in strategy and project development?
- Who develops organisational budgets and prioritises expenditure?
- Who is benefiting from the organisation's resources?
- Who can contribute to organisational decision making and strategic direction?
- Is the organisation taking active steps to ensure the safety of women?
For example, does it have a sexual harassment policy or gender equality policy?

Gender-sensitive indicators are also helpful at organisational level to measure progress towards gender equality commitments.



Quantitative and qualitative indicators

At organisational level, quantitative indicators may include:

- Numbers of women, men and people of other genders in leadership positions
- Numbers of women, men and people of other genders in paid positions compared with numbers in voluntary, unpaid positions
- Percentage of project funding proposals meeting gender minimum standards (at least gender-sensitive)
- Percentage of advocacy outputs for which a gender analysis has been carried out to inform the messaging
- Percentage of target countries demonstrating improved use of sex-, age- and disability-disaggregated data.

Qualitative indicators may include:

- Content/quality of the gender equality policy
- Quality/level of implementation of the gender equality policy
- Type and adequacy of budget reserved for organisational gender mainstreaming initiatives
- Type and level of participation of women in organisational strategic decision-making.

6. ILO, A Manual for Gender Audit Facilitators: The ILO participatory gender audit methodology, 2007

Section 6: Understanding participation

Learning objective: Understand the concept of participation.

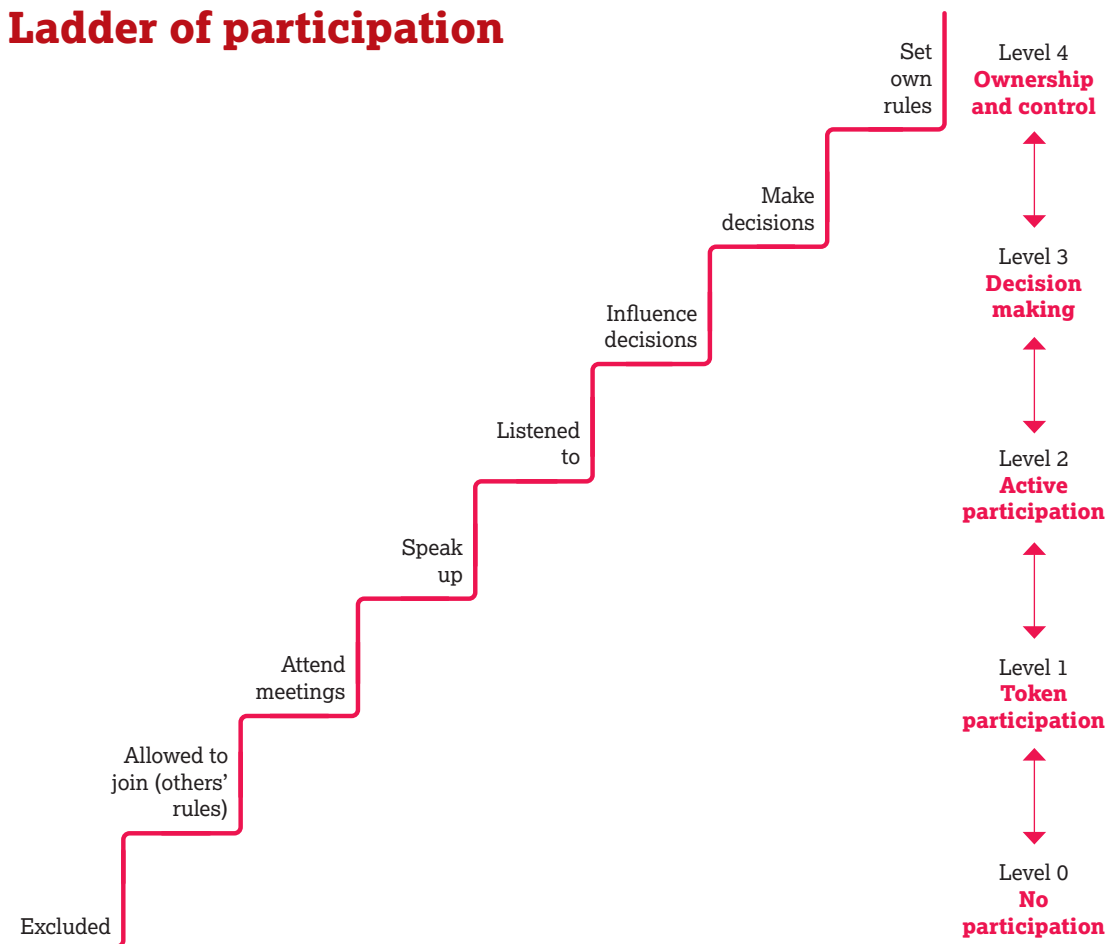
Participation

Participation is a human right: the right of all people to engage in society and in decisions that affect their lives. Participation is closely linked to the concept of “voice”. Strengthening the voices of older people is essential in enabling them to claim their rights, participate in development processes and lead dignified, healthy and secure lives.

There are different levels of participation. It can be helpful to think of these as a ladder or staircase. The different levels relate to the quality of participation. At the bottom, there is no participation. People have no opportunity to take any part in making decisions on issues that affect their lives. Each step of the staircase represents a higher level of participation. At the top are ownership and control. Climbing the staircase is not competitive. People do not have to step over each other to reach the top.

Increasing the level of participation is a political effort when it challenges oppression and discrimination, in particular of marginalised people such as women, older people, people with disabilities, indigenous people, LGBTI+ people, people from ethnic or religious minorities, children, adolescents, etc.

Ladder of participation



Source: <https://blogs.cornell.edu/gblblog/files/2016/09/STSS.Harts-Ladder-of-Participation-19tvldl.pdf>

Section 7: Links between the gender analysis framework and 4-power framework

Learning objective: Understand the links between the gender analysis and 4-power framework.

Power is the ability to create or resist change. It can be held by individuals or groups. Power held by individuals relates to their autonomy, which can be less visible. Power held by groups relates to set structures and rules in any given context.

It is important to consider the power dynamics at play within any group you are working with. Inequality is usually based on a power imbalance. More powerful people restrict less powerful people's access to rights and resources.

Types of power

There are four types of power:

- | | |
|---------------------|---|
| Power over | This is domination, often a negative use of “power over” other people. It can be exploitative and repressive. It can be used to control resources and opportunities for influencing decisions. However, “power over” does not have to be negative. It can just mean having access to and control of financial, physical and knowledge-based assets. It can also mean having control over other people to protect their interests. |
| Power to | This means being able to choose what to do and being able to do it. It includes resisting or creating change. It means being able to make decisions (within the household, community or more broadly) and to shape one's life. |
| Power within | This refers to the knowledge, capability, self-esteem and self-belief of any individual to enable them to bring about change in their life. It promotes personal dignity. It is often influenced by cultural or religious norms. |
| Power with | This is the ability of people with different interests to find common ground and act collectively, based on a sense of solidarity and mutual support, to build collective strength. |

Source: VeneKlasen L, and Miller V, 'Power and empowerment', PLA Notes, 43: 39-41, 2002, and Comic Relief Maanda Initiative, *A framework for women and girls' empowerment: Guidance for Maanda applicants and grantees*, Comic Relief, 2014

Areas of enquiry and questions for gender analysis

When carrying out a gender analysis, use the answers to your questions across the areas of enquiry (gender analysis table in Section 2), to identify the prevailing power dynamics:

- Questions about roles and responsibilities (who does what?) relate to “power to” do something.
- Questions about access to and control over resources (who has what? who can use what and who has control over it?) relate to “power over” the resources and “power to” do something with them. Questions about social capital, such as having good friends or being a member of a club, relate to “power with”.
- Questions about bodily autonomy, violence and safety relate to “power over” (one's own body or someone else's body), “power within” (having confidence and self-esteem) and “power to” do something or prevent something from happening.

- Questions about knowledge and information (who has information about what? who do they share this information with?) can relate to all four powers:
 - “power over” the information or knowledge as a resource
 - “power to” do something with the knowledge and information and decide who to share it with
 - “power within”, because knowledge and information can increase self-esteem and confidence
 - “power with”, when the information and knowledge is shared to benefit people more widely.
- Questions about aspirations and participation (who participates at what level and for what purpose?) relate to “power to” do what the person is aspiring to, “power with” by collaborating with others and finding solidarity, and “power within” by increasing confidence.

Voice and power

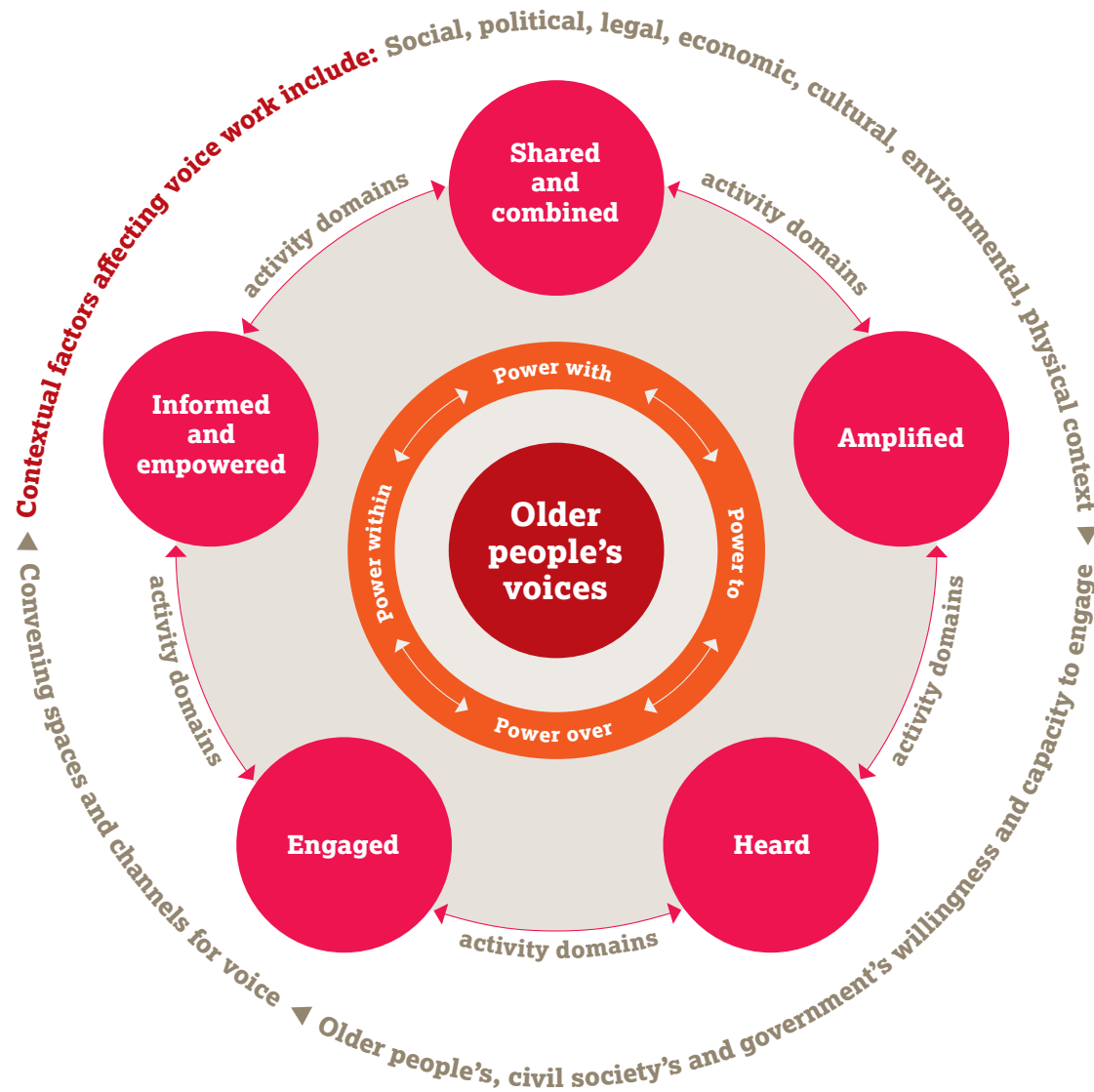
HelpAge has highlighted the importance of understanding the four powers through its work on voice and the development of its Voice framework. HelpAge’s Voice framework includes five domains of voice activity, outlined below, each of which HelpAge is already engaged in within different contexts. Evidence from HelpAge and network members’ work and broader activity on voice within development settings suggests these are all critical to strengthening older people’s voices and to building “power over”, “power to”, “power within”, and “power with”. The domains and their related goals envision older women and men’s voices being:

- **Engaged** “I am able and incentivised to take part in activity that strengthens my voice and my rights regardless of my identity, individual or group characteristics, or the context in which I live”
- **Informed and empowered** “I have information and knowledge related to my rights and entitlements and I have the resources and skills to claim these rights and raise my voice, including confidence and self-esteem”
- **Exercised and combined** “I have the opportunity and resources to meet with others, exercise my voice, and debate. We are able to identify our needs, consider solutions, and form a collective, legitimate and representative voice”
- **Transmitted and mobilised** “I have the opportunity to transmit my voice through a variety of channels and to join with others to amplify our voice, influence agendas, and create movements for change”
- **Heard** “My voice is heard and responded to through my active participation in decision-making processes through which I can effect change. My rights are realised and I have access to mechanisms with which I can hold power holders to account”.

Surrounding the domains, the HelpAge’s Voice framework also includes critical contextual factors that we know have a profound impact on the outcomes of voice-related activity. All voice-related activity takes place in highly complex contexts that range radically both between and within countries and groups. Cultural and social norms as well as political, environmental and physical contexts manifest themselves in power dynamics from the household to the national level which affect voice at all stages of life.

Power dynamics are also influenced by multiple and intersecting individual and group characteristics that change and accumulate across the life course and which affect how individuals experience key transition points – including those that people face as they move from being younger old to older old. This means that the effect of age on voice is never homogenous. Older age intersects in a unique way with gender and disability, in particular, as the interaction of discrimination or exclusion experienced as a result of these characteristics can markedly intensify disadvantage. We know that older women and older people with disabilities will always face more of a challenge to exercise their voices in all contexts and at all levels. These characteristics are therefore drawn out in the centre of HelpAge’s Voice framework, reflecting the influence they have upon an individual or group’s power and voice.

To be successful, interventions must analyse and address contextual factors and the effect of individual and group characteristics on voice, seeking to transform the power relations that underpin them.



HelpAge's Voice framework is founded upon the assertion that older people's voices are strongest when all the domains of voice activity that it outlines are addressed, from ensuring older women and men are engaged in voice-related activity and are informed and empowered as individuals, to ensuring older people's voices are heard by power holders and that they can effect change. However, work on all these domains doesn't necessarily have to happen at the same time and the process of strengthening older people's voices should not be thought of as linear. Indeed, undertaking voice-related activity in any domain is never a linear, clean process. What is important is that how different domains interact with each other and their contexts is considered when designing interventions and that the implications of each area of work on the others is thought about.

On the other hand, analysis of critical contextual factors (those included in HelpAge's Voice framework but also others that might be relevant in the context you're working in) and the impact of age, gender, disability and other characteristics, must always take place when designing voice activity and inform how interventions seek to transform power relations. It should be noted in planning that these contexts and characteristics are likely to interact in diverse and unforeseeable ways throughout the project, creating opportunities as well as barriers to strengthening older women's and men's voices. Please refer to the Annex for more information.

Quiz

Try this quiz to check what you have learnt from this module. Answers at the end.

1. Gender mainstreaming means projects are about women:

- True
 False

2. Gender-sensitive means you only need to collect sex-disaggregated data:

- True
 False

3. To develop a gender-sensitive programme with interventions in different locations you need to:

- Carry out a gender analysis in only one location
 Pay attention to gender analysis findings from different locations

4. People who carry out a gender analysis:

- Need training beforehand
 Only need to be briefed on how to use gender analysis tools

5. It is the sole responsibility of the gender focal point to deal with gender issues in the project:

- Yes
 No

6. If a gender analysis is carried out at the start of the project cycle, the project will automatically be gender transformative:

- True
 False

7. There is no risk of any backlash against women taking part in a gender-sensitive project:

- True
 False

8. At programmatic level, which of the following elements is not part of gender mainstreaming:

- SADDD data disaggregation
 Gender-equality outcomes
 Project indicators that reflect anticipated benefits for each of women, men and people of other genders
 Gender-neutral budget planning

9. A gender-responsive budget should divide money and resources equally between women, men and people of other genders:

- True
 False

1 False; 2 False; 3 Pay attention in your gender analysis to the differences in locations; 4 Need training; 5 No, it is everyone's responsibility to support gender-related work; 6 False; 7 False; 8 Gender-neutral budget planning; 9 False

Module 4

Gender analysis practical exercises

This module demonstrates how to carry out a gender analysis. It uses four case studies. Each case study is written up twice, the second time with highlighted text and notes showing:

Gender analysis of response:

- Reproductive/productive/community roles – highlighted in **PINK**
- Practical/strategic needs – highlighted in **GREEN**
- Level of participation – highlighted in **YELLOW**
- Gender-neutral/gender-sensitive/gender-transformative approach – highlighted in **PURPLE**
- Questions – highlighted in **BLUE**

Gender roles, needs and approaches

To apply a gender analysis, you need to determine:

- gender roles
- gender needs
- participation levels
- gender-neutral/gender-sensitive/gender-transformative approach
- where we make assumptions
- where we need to find out more about process and content.

Gender roles

Gender roles may be productive, reproductive or community:

Productive roles are activities carried out to secure goods or services for sale to enable people to survive. They include employment, farming and trading.

Reproductive roles are activities that keep families alive and well. They include childbearing, caring for family members and managing the home (such as fetching water and firewood). Reproductive roles are often manual, time-consuming and unpaid.

Community roles are activities that promote community cohesion. They include organising social events such as ceremonies and celebrations, arranging community improvements and serving on committees. Women's community roles are often an extension of their reproductive roles of mobilising, caring and providing, performed on a voluntary, unpaid basis. Men's community roles are often political and include decision-making. They are more often paid and associated with status and power.

With the exception of childbearing and breastfeeding, all these roles can be performed by both women and men. However, cultural and social norms often assign specific roles to either women or men, including in older age. Different values are attached to different roles. The hierarchy of roles and the way roles are distributed between women and men leads to unequal power relationships between women and men.

Gender needs

These can be practical or strategic:

Practical needs

- tend to be immediate and short-term
- unique to particular women, men or people of other genders

- relate to daily survival, such as food, housing, healthcare, water and income
- easily identifiable by women, men or people of other genders
- can be met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses.

Addressing practical needs:

- involves women, men or people of other genders as recipients and perhaps participants
- can improve the condition of women's, men's or people of other genders' lives
- generally, does not alter existing roles and relations.

Strategic needs

- tend to be long-term
- common to almost all women, men or people of other genders
- for women, often relate to their disadvantaged position over the life course, subordination, lack of resources and education, vulnerability to poverty and violence, etc
- basis of disadvantage and potential for change not always identifiable by women, men or people of other genders
- can be addressed by consciousness-raising, increasing self-confidence, education, strengthening movements, political mobilisation.

Addressing strategic needs:

- involves women, men or people of other genders as agents of change or enables them to become agents of change
- can improve the position of women or people of other genders in society through transformation of unequal power relations.

Gender approaches

Approaches may be gender-neutral, gender-sensitive or gender-transformative.

Gender-neutral approach

- Some gender and age analysis is done, but used as background information
- Gender- and age-disaggregated data is presented but not analysed
- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are not included
- Resources are not allocated to activities promoting gender equality.

Gender-sensitive approach

- Gender and age analysis is done
- Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed
- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included
- The intervention is more likely to focus on their practical or immediate needs.

Gender-transformative approach

- Both quantitative and qualitative gender and age analysis is done
- Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources
- Gender equality is promoted as a major goal
- The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes
- Gender is built into the response and the causes of inequality are addressed head on.

Case study 1: Humanitarian action

Case study

Support to marginalised women affected by floods: Project summary

During recent heavy rainfall in Sri Lanka, a number of villages were buried under mudslides and flooded from overflowing rivers. Thousands of people were evacuated to the closest safe town where an evacuation centre was set up.

Local authorities and civil society organisations, including older people's associations and disabled people's organisations, collaborated to form a steering committee to arrange support for excluded affected groups. The steering committee called on various women's groups, including older women and women with disabilities, to form an evacuee managing committee and a task force, consisting of their members, to run the evacuation centre and ensure the wellbeing of the evacuees. Their responsibilities included:

- finding family members who had become separated from each other
- distributing food and clothes
- running activities and lessons for children
- running support groups to provide psychosocial peer support
- arranging health checks and treatment.

The evacuee managing committee received a fixed budget, set by the steering committee, to use as they saw fit. The managing committee also assigned responsibilities to task force members.

The steering committee also set up a rescue, rehabilitation and planning committee run by male members of various community groups, including older people's associations and disabled people's organisations. The committee was tasked with:

- visiting affected areas helping to organise rescue efforts
- talking to village and religious leaders, local authorities and affected household heads to assess the need for assistance
- planning how to help communities rebuild their lives and minimise the long-term effects of the disaster
- developing a disaster risk reduction strategy to avoid future extensive loss of life and homes.

The rescue, rehabilitation and planning committee received a budget based on recommendations by its main members. The budget included a daily allowance to cover the travel costs of committee members, and a very small salary for members according to their responsibilities. It chose a senior management team and assigned tasks to the rest of the members according to their expertise and interests.

Both committees reported to the steering committee on a bi-weekly basis. The steering committee instructed the two committees to make whatever changes were deemed necessary.

The rescue, rehabilitation and planning committee produced a report on its findings and recommendations to the steering committee and local authorities, who passed it on to various civil society organisations including women's groups, older people's associations and disabled people's organisations.

Once the disaster risk reduction strategy was signed off by the steering committee and local authorities, it was published and disseminated to appropriate civil society organisations to incorporate into their organisational planning.

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Which women were in leadership positions? **BLUE**

Were women consulted? **BLUE**

High level of participation (making decisions) **YELLOW**

Reproductive and (unpaid?) community roles **PINK**

Were women consulted? **BLUE**

Which women were assigned to which tasks? **BLUE**

Paid community roles **PINK**

High level of participation (making decisions, set own rules) **YELLOW**

Who was in leadership positions? Who did what tasks? **BLUE**

Reproductive/productive/ community roles **PINK**

Practical/strategic needs **GREEN**

Level of participation **YELLOW**

Gender-neutral/gender-sensitive/gender-transformative approach **PURPLE**

Questions **BLUE**

Additional analysis: differences between processes for women's and men's committees

- Men were consulted about the budget for their tasks. Women were assigned a fixed budget without their input.
- Men received a per diem and salaries (even if very small). Women were not paid for their work.
- Men were in charge of fact-finding. Women were not involved in fact-finding or providing validation from the evacuees in their care.
- Men interviewed household heads. Household heads could mostly be men who might not identify the specific needs of women or younger household members. The responses of women heads of households might be influenced by the fact they were being interviewed by men. Findings might be interpreted and recommendations made from a male perspective.
- All the information gathered sat with the steering committee which chose what information to share with whom and when. Findings and recommendations were potentially not validated by women as the women's committee was not asked to provide any feedback.

At an organisational level, this project was mostly gender-neutral. Although women ran the evacuation centre with a high degree of autonomy, the design and set-up of the project reinforced gender-unequal structures and potentially undermined efforts to respond to women's needs, both practical (expressed by male heads of households or interviews with men) and strategic (met through unpaid community and reproductive responsibilities by the women's committee only).

From a power perspective, women participating in the evacuation managing committee had "power to" run the evacuation centre (within the budget allocated) and make decisions on management, priorities, etc. They had (limited) "power over" resources and the people in their care, and over the task force by allocating tasks. We do not know how this management and decision-making power was distributed among the different civil society organisations (older people's associations, disabled people's organisations, other women's organisations) but the collaboration reflects "power with". If management and task distribution were fairly inclusive, they would have supported some "power within".

Overall, within their area of responsibility, women may have had a good level of power. However, considering the lack of equal pay, consultation on the budget, potentially poor validation of needs assessments carried out by men, and lack of input into recommendations, their level of power was lower than men's.

At a programmatic level, we do not have enough information to determine what sorts of power lay with women or men, or how gender-sensitive or gender-transformative the project was. However, our analysis shows that we might have concerns about how well the project responded to the needs of women.

Case study 2: Humanitarian action

Case study

Improving the psychosocial wellbeing and rehabilitation of older refugees: Project summary

The objectives of the project are to:

- improve the psychosocial wellbeing of 3,200 older refugees and their dependants
- initiate the rehabilitation of 2,400 older refugees and their dependants.

HelpAge surveyed the needs of over 1,000 older refugees (60 per cent women, 40 per cent men). Of those interviewed, 78 per cent exhibited signs of distress ranging from emotional instability to cognitive, behavioural and relationship problems. Also, 50 per cent complained of a lack of livelihood opportunities and 60 per cent identified income as a priority need.

Older women, in particular, often shoulder household responsibilities and care for children (60 per cent of the women surveyed). At the same time, many suffer from chronic health conditions and mobility problems. The combination of their responsibilities and vulnerabilities compound the psychological strain of camp life.

Response:

- Establish 60 older people's clubs (30 for women and 30 for men).
- Train 500 older people (250 women and 250 men) as peer counsellors across three camps to recognise symptoms of trauma and stress and learn how to alleviate these through talking therapies.
- Support the 500 peer counsellors to offer individual and group counselling to 3,200 older refugees through home visits and organised sessions in existing meeting spaces in the camps. Women will mostly do the home visits to support women who cannot come to the group sessions because of their care responsibilities or if they do not feel confident in groups. Men will run many of the group sessions in anticipation that they might have to deal with behavioural issues (e.g. aggression). Counsellors will be paid an incentive.
- Organise a variety of cultural and sports activities in the camps to relieve stress and strengthen social cohesion and trust. These will be linked to the older people's clubs. It is anticipated that men will mostly do sports such as football and fitness training, and women will do dancing and arts activities such as drawing and poetry-writing. There will be quarterly competitive games against teams from surrounding villages and towns, and an annual exhibition of women's drawings and poetry.
- Provide start-up capital to members of older people's clubs to set up small businesses, following market assessments and consultation with other interested parties. It is anticipated that 65 per cent of older entrepreneurs will be men and 35 per cent will be women, based on their availability and market demands.
- Provide tailored training to older entrepreneurs in their chosen business activity as well as general business training.
- Arrange for project staff to mentor older entrepreneurs throughout the three-year project through regular visits.

Additional information on the budget:

- The budget line for counselling activities is derived from counsellors' salaries (women and men receive the same salary) and stationery for record-keeping.
- The budget line for cultural and sports activities is 70 per cent for sports equipment and 30 per cent for writing and drawing materials.

The majority of project staff are men, partly because of availability, and partly because it seems that more men than women in the refugee population will need business support or psychosocial support to deal with behavioural or relationship problems.

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How do these figures relate to women relative to men?

BLUE

Reproductive role

PINK

Practical needs

GREEN

If 60% women and 40% men, why equal number of clubs for women and men?

BLUE

No transport for home visits?
No help with care?

PURPLE

Single-sex or mixed-sex groups?

BLUE

Listened to, or stereotyping?

YELLOW

Equitable?

YELLOW

Practical needs

GREEN

Women's strategic needs?
Assumptions on roles and needs? Appropriate interaction?

PURPLE

Reproductive/productive/
community roles

PINK

Practical/strategic needs

GREEN

Level of participation

YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach

PURPLE

Questions

BLUE

Additional gender analysis

The project is inconsistently gender-sensitive. At times it is gender-neutral:

- There are some findings specifically on the situation of older women. However, there is no consistent sex-disaggregation of the psychological symptoms of women and men, which should influence the response. It is hinted that men might display challenging behaviour, as it is anticipated that male counsellors will run group counselling sessions.
- Some activities are planned for women and men in equal numbers, such as clubs and training as peer counsellors. However, this is not necessarily equitable, as there are more older women in the camp than men. In some cases, equal numbers favour men, such as support for livelihoods, based on assumptions about women's and men's availability and skills.
- Male and female peer counsellors will receive the same salary. However, women are expected to do most of the home visits without a corresponding budget line to cover travel expenses. This is a concern, considering their health and mobility challenges, safety and care responsibilities.
- An assumption seems to have been made that only men can deal with difficult situations i.e. aggressive behaviour in group work. Is this based on a stereotyped view of men as stronger and more authoritative? In any case, would this be the best approach to deal with aggression? Will the men be trained? If so, why not women too?
- Plans for cultural and sports activities also reflect gender-stereotypes. More importantly, there is more investment in men's activities than women's.
- Using market demands to identify livelihoods activities potentially reinforces lower-paid jobs for women. Anticipating engaging fewer older women because of their challenges (care, health, etc) does not support a gender-transformative approach, which would question and address such challenges.

From a power perspective, women appear to have the same or similar "power to" participate in peer counselling, earn an income and have an outlet for their creativity and coping strategies as men. This will have a positive impact on their "power within" and their opportunity to collaborate with others ("power with") through counselling, arts and, potentially, livelihoods activities. There is not enough information to determine women's level of "power over" their own decisions about the process, such as home visits or centre-based group counselling, type of livelihood based on market assessment, or what to do with their earnings.

Case study 3: Income security

Case study

Women as agents of change in Latin America: Project summary

Everyone has the same right to health, decent work, rest and leisure, and social protection. Many older women are denied these basic rights, and the power to make life decisions. The Social Development Goals (SDGs) commit governments and other stakeholders to a rights-based approach that includes older women, who are often at the centre of their homes and communities.

However, despite the economic empowerment of women being discussed more frequently in the international political agenda, the role of older women, their rights, needs and priorities are largely absent from these discussions. The connection must be established that gender equality will only become a reality when people of all genders and ages can make meaningful decisions and have control over their rights.

Older women in low- and middle-income countries are boosting economies by making substantial contributions through domestic work and unpaid care for their families and communities. In the poorest countries, many older women also do paid work to support themselves and their households. The absence of unpaid care work in traditional economic thinking, and the way in which this reinforces unequal power relations between women and men, can have consequences for the work that older women do and their access to assistance and income.

Additionally, the lack of visibility of older women in the economic empowerment agenda has meant that they are not included in efforts to address systemic gender inequality. The traditional support of the family and the community is constantly changing, which means that policy makers must urgently recognise the economically significant role of older women in low- and middle-income countries. While the SDGs recognise the need to consider women of all ages, they are not explicit about what this means for older women. Within the frameworks of policies on the economic empowerment of women, older women are not yet recognised as active contributors to development.

The world is ageing at an unprecedented rate. By 2030, the number of people aged 60 and over will be 1.4 billion. On average, women live five years longer than men, but they do not necessarily live their later years in good health or with adequate resources. In Latin America, the older population is growing faster than the rest of the population. HelpAge's Global AgeWatch estimates that by 2050, 24 per cent of the population of El Salvador, 21 per cent in the Dominican Republic and 18 per cent in Colombia will be aged over 60 years.

Older women have rights and aspirations, and may need support to guarantee their wellbeing, regardless of their contributions to society. The structural gender inequalities throughout life and the change in family and social structures show that this is often not the case. Income security, access to medical care, long-term care systems that support caregivers and those in their care, inclusive decision-making, legal systems that guarantee rights and positive social attitudes towards ageing, are all crucial so that older women can live fully. In Latin America, not enough is being done to make visible and guarantee the rights of older women.

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Case study 3: Income security

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Case study

To advocate for these rights, a political and technical response involving national and local governments, civil society, the media and women's organisations is required. The proposal therefore focuses on developing different fundamental axes that will determine how to position the older women's rights agenda in Colombia, El Salvador and the Dominican Republic.

The main strategies for achieving this are: 1) the development of evidence and data that allow decision-making and prioritisation of interventions to assist older women; 2) the generation of leadership and capacities that will provide evidence to strategically advocate for older women's rights and raise their voices; 3) support to the organisational, associative and network building of women's entities; 4) the development of a communications, mobilisation and visibility plan.

Overall objective: Older women in Colombia, El Salvador and the Dominican Republic are recognised as equal economic, political and social actors, and their rights are respected and protected.

Specific objective: Generate evidence and strengthen the capacity of local organisations and older community leaders to advocate for national, local and community strategies, policies and plans to include the perspective and needs of older women.

Expected result: Women in Colombia, El Salvador and the Dominican Republic implement advocacy strategies to raise the situation of discrimination and violence against older women, ensuring that the problem is positioned at local and national levels and that innovative measures are taken to guarantee the rights and necessary services for older women to effectively enjoy their rights.

Outcome 1: Collection of quantitative and qualitative evidence to measure, produce, systematise, prioritise and analyse empirical information about the political and economic discrimination experienced by older women in Colombia, El Salvador and the Dominican Republic. Different intersecting identities will be considered, such as ethnicity, sexual orientation and gender identity, disability and rural/urban setting.

Outcome 2: Generation of capacity of at least 400 older women and other people per country, in Colombia, El Salvador and the Dominican Republic to advocate for the rights of older women.

Outcome 3: Strengthen the organisational, partnership and networking capacities of women taking part in the project in Colombia, El Salvador and the Dominican Republic.

Outcome 4: Development of an accompanying communications, mobilisation and visibility strategy.

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Practical needs
GREEN

Participation
– women consulted
YELLOW

Gender transformative
PURPLE

Productive, reproductive and
(unpaid?) community roles
PINK

Strategic needs
GREEN

How many women?
BLUE

Strategic and practical
needs
GREEN

continued over

Reproductive/productive/
community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-
sensitive/gender-
transformative approach
PURPLE

Questions
BLUE

Case study

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Strategic needs
GREEN

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Will these steps involve consultation with women?
BLUE

Overall objective: Older women in Colombia, El Salvador and the Dominican Republic are recognised as equal economic, political and social actors, and their rights are respected and protected.

Gender transformative
PURPLE

Specific objective: Generate evidence and strengthen the capacity of local organisations and older community leaders to advocate for national, local and community strategies, policies and plans to include the perspective and needs of older women.

High level of participation (influencing decisions)
YELLOW

Expected result: Women in Colombia, El Salvador and the Dominican Republic implement advocacy strategies to raise the situation of discrimination and violence against older women, ensuring that the problem is positioned at local and national levels and that innovative measures are taken to guarantee the rights and necessary services for older women to effectively enjoy their rights.

Gender transformative
PURPLE

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Outcome 2: Generation of capacity of at least 400 older women and other people per country, in Colombia, El Salvador and the Dominican Republic to advocate for the rights of older women.

High level of participation (speaking up, decision making)
YELLOW

Outcome 3: Strengthen the organisational, partnership and networking capacities of women taking part in the project in Colombia, El Salvador and the Dominican Republic.

Outcome 4: Development of an accompanying communications, mobilisation and visibility strategy.

Reproductive/productive/ community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

Case study 4: Income security

Case study

Social protection for older people in Nairobi, Kenya: Project summary

The project aims to improve systems and access to social protection for marginalised older people in urban areas of Kenya. There are three main objectives:

- Access to the Inua Jami 70+ (IJ70+) social pension programme for older people in project locations is more effective, appropriate and equitable.
- Accountability of targeted stakeholders involved in the execution of the IJ70+ programme, in particular the Government of Kenya, will be strengthened.
- Targeted state and non-state actors of the social protection sector will demonstrate improved capacity to implement inclusive age-, gender- and disability-friendly programmes in Kenya.

The training for staff designing the proposal covered aspects such as gender in communication materials, gender-sensitive language and integrating gender aspects into each phase of the project cycle. Three clusters of gender-specific activities were:

- **Equitable access** In view of gender-related barriers identified in accessing the IJ70+, practical support will be provided to eligible older women to overcome the barriers, particularly in relation to information, communication and rights awareness. For example, supporting older women to obtain or renew identification documents which are required to access the IJ70+.
- **Learning** Increasing knowledge of the intersections of gender, age and urbanisation. Gender dimensions will be included in the research elements of the project including in the baseline, vulnerability assessments and impact assessment of the IJ70+ on socio-economic and household dynamics.
- **Capacity building** Provision of gender-specific capacity building for HelpAge and implementing partners. For example, a training budget will be allocated towards the development of organisational knowledge on gender mainstreaming and gender-transformative programming.

Gender will also be mainstreamed into empowerment activities benefiting older people's associations and older citizen monitoring groups.

The main interventions are:

- Awareness and information session about social protection, older people's rights, Inua Jami 70+ and claims mechanisms (e.g. beneficiary welfare committees); training of trainers on complaints and grievance procedures, elaboration of a charter of rights and responsibilities towards pension recipients; distribution of forms (including claims forms) and claims registers in the targeted communities, legal and administrative assistance through beneficiary welfare committees (e.g. obtaining or replacing ID documents and biometric cards).
- Radio campaigns, *barazas* (community meetings) and other consultation and dialogue mechanisms adapted to older people, taking into account any constraints related to gender or disability, training and operational costs of older citizen monitoring groups, capacity building for beneficiary welfare committees as official platforms for feedback.
- Digital data collection through surveys, data analysis, local and national advocacy actions including presentation of recommendations, capacity building for Social Assistance Unit/National Safety Net Programme in relation to complaints and grievances, learning and knowledge dissemination about targeting and innovation for social accountability in social protection, longitudinal study, seminars and workshops.

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Case study 4: Income security

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Case study

Power dynamics and discrimination against women persist, and ageing policies mostly fail to be gender-responsive in relevant ways. In social protection programmes, gender is rarely an intentional, preferred or understood programming lens, even though the socio-economic status of women throughout their lives keeps them away from contributory social protection systems, and the needs of women and men differ in older age.

The UNDP *Kenya Human Development Report (2015)* explains that, in spite of strong female participation in the labour market in Kenya, only 19.3 per cent of women have a salaried job, whereas 77 per cent are independent workers (i.e. they manage a micro-enterprise or work in the informal sector). In this context, contributory pension schemes can aggravate gender inequalities.

Cash transfers can also have adverse effects on older people, in particular, older women. Older women are more likely to be expected to share the cash they receive or use it for the household or other people. They are more likely to be denied full control of their resources. Some of these risks and negative effects may even relate to gender-based violence.

The positive effects of social pensions on gender equality are, however, well documented (e.g. rebalancing of intra-familial or household decision-making and power dynamics, improved nutritional status, more limited social isolation), although to a lesser extent in Kenya. Therefore, gender-specific vulnerability studies and a gender analysis (adapted from the existing HelpAge tool) will be conducted in the inception phase of the intervention. Observations and findings from these studies will be used to inform activities and their targeting. Following the “Do no harm” principle, a specific mapping of the differentiated needs of older people of different genders will be conducted through community-level participatory methods.

Envisaged partnerships

HelpAge and its partners will steer and manage the project. They will ensure the mobilisation of existing community groups (50 beneficiary welfare committees, 10 older people’s associations and 20 older citizen monitoring groups), as well as the policy dialogue with and advocacy towards the Government of Kenya, its agencies and the public mechanisms concerned. A total of 20,000 older people (8,000 men and 12,000 women aged 70 and over in the targeted locations) will be encouraged to take part in project activities through consultation and citizen monitoring mechanisms.

Case study

Social protection for older people in Nairobi, Kenya: Project summary

The project aims to improve systems and **access to social protection** for marginalised older people in urban areas of Kenya. There are three main objectives:

- **Access to the Inua Jami 70+ (IJ70+) social pension programme for older people** in project locations is more effective, appropriate and equitable.
- Accountability of targeted stakeholders involved in the execution of the IJ70+ programme, in particular the Government of Kenya, will be strengthened.
- Targeted state and non-state actors of the social protection sector will demonstrate improved capacity to implement inclusive age-, gender- and disability-friendly programmes in Kenya.

The training for staff designing the proposal covered aspects such as gender in communication materials, gender-sensitive language and integrating gender aspects into each phase of the project cycle. Three clusters of gender-specific activities were:

- **Equitable access** In view of gender-related barriers identified in accessing the IJ70+, practical support will be provided to eligible older women to overcome the barriers, particularly in relation to information, communication and rights awareness. For example, supporting older women to obtain or renew identification documents which are required to access the IJ70+.
 - **Learning** Increasing knowledge of the intersections of gender, age and urbanisation. Gender dimensions will be included in the research elements of the project including in the baseline, vulnerability assessments and impact assessment of the IJ70+ on socio-economic and household dynamics.
 - **Capacity building** Provision of gender-specific capacity building for HelpAge and implementing partners. For example, a training budget will be allocated towards the development of organisational knowledge on gender mainstreaming and gender-transformative programming.
- Gender will also be mainstreamed into empowerment activities benefiting older people's associations and older citizen monitoring groups.

The main interventions are:

- **Awareness and information session about social protection, older people's rights,** Inua Jami 70+ and claims mechanisms (e.g. beneficiary welfare committees); training of trainers on complaints and grievance procedures, elaboration of a charter of rights and responsibilities towards pension recipients; distribution of forms (including claims forms) and claims registers in the targeted communities, legal and administrative assistance through beneficiary welfare committees (e.g. obtaining or replacing ID documents and biometric cards).
- Radio campaigns, *barazas* (community meetings) and other **consultation and dialogue mechanisms adapted to older people, taking into account any constraints related to gender or disability,** training and operational costs of older citizen monitoring groups, capacity building for beneficiary welfare committees as official platforms for feedback.
- Digital data collection through surveys, data analysis, local and national advocacy actions including presentation of recommendations, capacity building for Social Assistance Unit/National Safety Net Programme in relation to complaints and grievances, learning and knowledge dissemination about targeting and innovation for social accountability in social protection, longitudinal study, seminars and workshops.

Practical needs
GREEN

Gender sensitive
PURPLE

Gender transformative
PURPLE

Gender sensitive
PURPLE

Strategic needs
GREEN

Gender transformative
PURPLE

Gender sensitive and transformative
PURPLE

Gender transformative
PURPLE

Strategic needs
GREEN

Active participation – inclusive approach to the intervention's tools/mechanisms/tools
YELLOW

Reproductive/productive/community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

continued over

Case study

Power dynamics and discrimination against women persist, and ageing policies mostly fail to be gender-responsive in relevant ways. In social protection programmes, gender is rarely an intentional, preferred or understood programming lens, even though the socio-economic status of women throughout their lives keeps them away from contributory social protection systems, and the needs of women and men differ in older age.

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HelpAge and its partners will steer and manage the project. They will ensure the mobilisation of existing community groups (50 beneficiary welfare committees, 10 older people’s associations and 20 older citizen monitoring groups), as well as the policy dialogue with and advocacy towards the Government of Kenya, its agencies and the public mechanisms concerned. A total of 20,000 older people (8,000 men and 12,000 women aged 70 and over in the targeted locations) will be encouraged to take part in project activities through consultation and citizen monitoring mechanisms.

Productive roles
PINK

What risk mitigation measures will be put in place?
BLUE

Gender transformative
PURPLE

Gender sensitive
PURPLE

Participation of local community members in needs mapping
YELLOW

Active participation (consultation with older people)
YELLOW

Reproductive/productive/ community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

Further reading

Annex

HelpAge

The following resources are stored on our internal Gender equality sharepoint site:

- Gender analysis: a checklist for producing advocacy outputs, 2019
- Gender analysis guide, 2014
- Gender equality policy, 2011
- Minimum standards for gender mainstreaming, 2014
- Sex, age and disability disaggregated data (SADDD): minimum standards and guidance, 2018
- Voice framework, 2019

Ageing and gender

- Ageing and Lifecourse, WHO
<https://www.who.int/ageing/ageism/en>
- *Developing a life course approach to women's rights and gender equality*, 2018
Age International and GADN
<https://gadnetwork.org/gadn-resources/2018/11/20/developing-a-life-course-approach-to-womens-rights-and-gender-equality>
- *Sex and age matter: Improving humanitarian response in emergencies*, 2011, Feinstein International Center, Tufts University
<https://fic.tufts.edu/wp-content/uploads/sex-and-age-matter.pdf>
- *VAWG Resource Guide: Brief on Violence Against Older Women*, 2016, World Bank, ICRW, GWI, IDB
https://www.un.org/esa/socdev/documents/ageing/vawg_brief_on_older_women.pdf

Gender mainstreaming

- *A Manual for Gender Audit Facilitators: The ILO participatory gender audit methodology*, 2014, ILO
https://www.ilo.org/wcmsp5/groups/public/---dgreports/---gender/documents/publication/wcms_187411.pdf
- Gender and UK Aid Direct, UK Aid
<https://www.ukaidirect.org/learning/gender/>
- *Gender Equality Capacity Assessment Tool*, 2014, UN Women
<https://www.unwomen.org/en/digital-library/publications/2014/6/gender-equality-capacity-assessment-tool>
- *Gender Mainstreaming Resource Pack: A practical guide for programming*, 2010, Trocaire
<https://www.trocaire.org/resources/policyandadvocacy/gender-mainstreaming-resource-pack-practical-programming-guide>
- *Gender Responsive Communication for Development: Guidance, Tools and Resources*, 2018
UNICEF
<https://www.unicef.org/rosa/media/1786/file/Gender%20responsive%20communication%20for%20development%20.pdf>
- *How to do Advocacy with a Gender Perspective: A guide and a checklist*, Diakonia
<https://www.diakonia.se/globalassets/documents/diakonia/how-we-work/gender-mainstreaming-toolbox/how-to-do-advocacy-with-a-gender-perspective-guide-and-checklist.pdf>

Annex continued

- *Let's Speak Gender: 10 principles of gender responsive communications for development*, 2018, UNDP
<https://www.undp.org/content/dam/rbec/docs/10%20principles%20of%20gender-responsive%20communications.pdf>
- *Transforming gender relations in an ageing world*, 2018, Warwick University
<https://www.helpage.org/blogs/professor-ann-stewart-31571/consider-inequalities-across-the-life-course-to-improve-older-womens-lives-1087/>

Gender analysis

- *A Guide to Gender-Analysis Frameworks*, Oxfam Policy and Practice, 1999
<https://policy-practice.oxfam.org.uk/publications/a-guide-to-gender-analysis-frameworks-115397>
- *Country gender equality profiles: Guidance note*, 2018, UN Women
<https://www.ungm.org/UNUser/Documents/DownloadPublicDocument?docId=793070>
- *Gender analysis toolkit for health systems*, 2016, Jhpiego
<https://gender.jhpiego.org/analysistoolkit/>
- *Gender Equality Index 2017*, European Institute for Gender Equality
<https://eige.europa.eu/publications/gender-equality-index-2017-measuring-gender-equality-european-union-2005-2015-report>
- *Gender Equality Program Guidance and Toolkit: Engendering transformational change*, 2014, Save the Children
<https://resourcecentre.savethechildren.net/library/save-children-gender-equality-program-guidance-and-toolkit-engendering-transformational>
- *Guide how to integrate disability gender assessments*, 2010, USAID
https://www.usaid.gov/sites/default/files/Guide_How_Integrate_Disability_Gender_Assessments_2010.pdf
- *Integrating a gender perspective into statistics*, 2016, UNDESA
<https://unstats.un.org/unsd/demographic-social/Standards-and-Methods/files/Handbooks/gender/Integrating-a-Gender-Perspective-into-Statistics-E.pdf>
- *Minimum set of gender indicators*, 2019, UNSD
<https://genderstats.un.org/files/Minimum%20Set%20indicators%202018.11.1%20web.pdf>
- *Participatory methodology: Rapid care analysis*, 2013, Oxfam
<https://policy-practice.oxfam.org.uk/publications/participatory-methodology-rapid-care-analysis-302415>
- *Rapid Gender Analysis*, Care International
<https://insights.careinternational.org.uk/in-practice/rapid-gender-analysis>

Power analysis

- *Power Analysis: A practical guide*, 2013, Sida
https://www.sida.se/contentassets/83f0232c5404440082c9762ba3107d55/power-analysis-a-practical-guide_3704.pdf
- *Power Analysis: Programme practice*, 2016, Christian Aid
<https://www.christianaid.org.uk/resources/about-us/power-analysis-programme-practice>

Annex continued

Intersectionality

- *Intersectionality: A Tool for Gender and Economic Justice*, 2004, AWID
<https://www.awid.org/publications/intersectionality-tool-gender-and-economic-justice>
- *Intersectionality Toolkit*, 2015, Iglyo
<https://www.iglyo.com/wp-content/uploads/2015/09/Inter-Toolkit.pdf>

LBTQI+

- Key signposting and glossary, Stonewall
https://www.stonewall.org.uk/sites/default/files/setting_up_lgbt_011.pdf
- *LGBT Ageing Review*, 2016, Williams Institute
<https://williamsinstitute.law.ucla.edu/wp-content/uploads/LGBT-Aging-A-Review.pdf>
- Understanding Gender, Gender Spectrum
<https://www.genderspectrum.org/quick-links/understanding-gender/>

Facilitation

- Energisers, SessionLab
<https://www.sessionlab.com/library/energiser>
- *Facilitation tools for meetings and workshops*, Seeds for Change UK
<https://seedsforchange.org.uk/tools.pdf>
- *Facilitating workshops briefing*, Seeds for Change UK
<https://www.seedsforchange.org.uk/facilwsh.pdf>

Accessibility

- Creating Accessible Documents, AbilityNet
<https://abilitynet.org.uk/factsheets/creating-accessible-documents-0>
- The Seven Principles of Universal Design, Rosemarie Rossetti
<https://www.udll.com/media-room/articles/the-seven-principles-of-universal-design/>

Glossary

Age	Age refers to the time lived since birth. ⁷
Ageism	Ageism means treating people unfairly because of their age.
Bisexual	Bisexual (or bi) refers to a person who has a romantic and/or sexual orientation towards more than one gender. ⁸
Gender	Gender refers to the social differences ascribed to women and men, which are often central to the way in which people define themselves and are defined by others. Gender roles are learned, changeable over time, and variable within and between cultures. Gender often defines the duties, responsibilities, constraints, opportunities and privileges of women, men, girls, and boys in any context.
Gender binary	A classification system consisting of two genders, male and female.
Gender and age analysis	Provides qualitative information on gender differences and inequalities, and how they change across the life course. It helps us understand specific issues faced by older women and men, and older people of other genders, and how gender norms, roles and relations change with age.
Gender equality	Gender equality refers to the equal enjoyment of rights, responsibilities and opportunities of women, men, girls and boys.
Gender equity	Gender equity means distributing benefits and responsibilities fairly between women and men, according to their respective needs.
Gender identity	Refers to each person's deeply felt internal and individual experience of gender, which may or may not correspond with their sex assigned at birth.
Gender mainstreaming	Gender mainstreaming means integrating a gender equality perspective in policies, programmes and projects. Women, men and people of other genders have different needs and circumstances, including unequal access to and control over power, resources, human rights and institutions. The aim of gender mainstreaming is to take into account these differences when designing, implementing and evaluating policies, programmes and projects, so that they benefit women, men and people of other genders and do not increase inequality but enhance gender equality. Gender mainstreaming aims to solve sometimes hidden gender inequalities. It is therefore a tool for achieving gender equality. ⁹
Gender neutral	Refers to interventions that do not address the differing needs and interests of women, men and people of other genders.
Gender sensitive	Refers to interventions that address the differing needs and interests of women, men and people of other genders. The response is more likely to focus on their practical or immediate needs.
Gender transformative	Refers to interventions that promote gender equality as one major goal (i.e. they explicitly address causes of gender inequality to transform unequal power relations between women, men and people of other genders, through changes in roles, status and through redistribution of resources).
Disability	Disability results from the interaction between persons with physical, mental, intellectual or sensory impairments and attitudinal and environmental barriers that hinders their full and effective participation in society on an equal basis with others. ¹⁰

Glossary *continued*

Diversity	Diversity refers to different values, attitudes, cultural perspectives, beliefs, ethnicities, nationalities, sexual orientation, gender identity, disability, health, social and economic status, skills, and other specific personal characteristics. Diversity characteristics vary from person to person and intersect, making each person unique. Respecting diversity means recognising and valuing those differences and creating a protective, inclusive, and non-discriminatory environment where everyone's rights are upheld. ¹¹
Gay	Refers to a man who has a romantic and/or sexual orientation towards men. Also a generic term for lesbian and gay sexuality – some women who are orientated to women define themselves as gay rather than lesbian. Some non-binary people may also identify with this term. ¹²
Heterosexual	Refers to a man who has a romantic and/or sexual attraction towards women or to a woman who has a romantic and/or sexual orientation towards men. ¹³
Homosexual	This might be considered a more medical term used to describe someone who has a romantic and/or sexual orientation towards someone of the same gender. The term “gay” is now more generally used. ¹⁴
Inclusion	Inclusion means enabling all people to access their rights, and to freely and openly participate and be recognised in society without restrictions, limitations, or discrimination.
Intersectionality	Different characteristics such as age, gender, ethnicity, disability, sexual orientation or location interact with each other, creating overlapping and interdependent systems of discrimination or disadvantage.
Intersex	A term used to describe a person who may have the biological attributes of both sexes or whose biological attributes do not fit with societal assumptions about what constitutes male or female. Intersex people may identify as male, female or non-binary. ¹⁵
Lesbian	Refers to a woman who has a romantic and/or sexual orientation towards women. Some non-binary people may also identify with this term.
LGBTQI+	The acronym for lesbian, gay, bi, trans, queer, intersex and plus which includes any orientation not represented by those letters.
Life course	A life course perspective is a way of reflecting on how to manage the risks or opportunities that people in every society face at key stages of life, in order to minimise and address the accumulation of disadvantage and inequality as people age.
Marginalisation	The complex process of relegating specific people or groups of people to the lower or outer edge of society economically, politically, culturally and socially.
Non-binary	An umbrella term for people whose gender identity doesn't sit comfortably with “man” or “woman”. Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely. ¹⁶
Old age	There is no global consensus on when old age begins. This is largely because people's perception of old age varies between individuals, communities and societies. ¹⁷ Old age may be regarded as a social construct rather than a chronological age. This is because populations reach old age at considerably different rates. For example, in a country where average life expectancy is 56 years, old age begins earlier than in a country where average life expectancy is 85 years. A person can be considered “old” when society starts treating them in a way that defines them as old. ¹⁸

Glossary *continued*

Practical needs	Interventions aimed at addressing practical needs do not challenge existing gender norms and socially accepted roles, though they arise out of gender divisions of labour and women's subordinate position in society. They are addressed through short-term, immediate and practical assistance.
Queer	Queer is a term used by those wanting to reject specific labels of romantic orientation, sexual orientation and/or gender identity. It can also be a way of rejecting the perceived norms of the LGBT community (racism, sizeism, ableism etc). ¹⁹
Rights-based approach	A rights-based approach is a way of working which is based on enabling people to realise their human rights to ensure their dignity and wellbeing.
Romantic orientation	A person's romantic attraction to other people, or lack thereof.
Sex	Refers to physical and biological attributes such as sex chromosomes, hormones and reproductive organs, which are used at birth to identify individuals as female or male.
Sexual orientation	A person's sexual attraction to other people, or lack thereof. ²⁰
Social exclusion	A complex and multi-dimensional process involving the lack or denial of resources, rights, goods and services, and the inability to participate in the normal relationships and activities, available to the majority of people in a society, whether in economic, social, cultural or political arenas. It affects both the quality of life of individuals and the equity and cohesion of society as a whole. ²¹
Social pensions	Regular state-provided (tax-financed) cash transfers to older people, where eligibility is not dependent on past contributions or earnings.
Strategic needs	Interventions aimed at addressing strategic needs challenge existing gender roles and women's subordinate position in society. They are addressed through long-term responses that contribute to achieving gender equality. Strategic responses relate to gender divisions of labour, power and control, and may include such issues as legal rights, decent work, and violence, abuse and neglect.
Transgender	Having a gender identity that does not correspond with a person's sex assigned at birth. Transgender people may identify as male or female, or they may feel that neither label fits them.
Unconscious biases	Social stereotypes about certain groups of people that individuals form outside their own conscious awareness. ²²

7. WHO, 2015

8. <https://www.stonewall.org.uk/help-advice/glossary-terms#s>

9. <https://www.coe.int/en/web/genderequality/what-is-gender-mainstreaming>

10. CRPD, 2006

11. UNHCR, 2018

12–16. <https://www.stonewall.org.uk/help-advice/glossary-terms#s>

17. Mazurana D, Benelli P, Gupta H and Walker P, *Sex and age matter: Improving humanitarian response in emergencies*, Medford, MA, Feinstein International Center, Tufts University, 2011

18. VAWG Resource Guide (2016) Brief on Violence Against Older Women, World Bank, ICRW, GWI, IDB

19, 20. <https://www.stonewall.org.uk/help-advice/glossary-terms#s>

21. <https://www.poverty.ac.uk/definitions-poverty/social-exclusion>

22. <https://diversity.ucsf.edu/resources/unconscious-bias>

HelpAge International is a global network of organisations promoting the right of all older people to lead dignified, healthy and secure lives.

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