



## Gender Analysis Competency Framework



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This document was prepared by the Institute for Gender and the Economy with financial support from Women and Gender Equality Canada. It is available for you to adapt for your own uses, with proper credit to the original source. Please cite this document as: Institute for Gender and the Economy, "Gender Analysis Competency Matrix", 2020 [www.gendereconomy.org/gender-analysis-competency-framework](http://www.gendereconomy.org/gender-analysis-competency-framework).

# Gender Analysis Competency Framework

## Overview

The Gender Analysis Competency Framework is a description of the knowledge, skills and behaviours required to conduct gender analysis. The framework outlines the core competencies for varying levels of experience.

The Framework is broken into three sections:

1. The 5 W's (What, Why, Where, When and Who of Gender Analysis)
2. How: Applying Gender Analysis
3. Organizational and Cultural Support

While the competencies are separated out into individual categories, they are clearly interrelated.

## Levels of experience

The framework identifies three levels of competence: Basic, Intermediate, and Advanced. These do not necessarily align with seniority.

1. **Basic:** Appropriate for those who are interested in understanding gender analysis or expected to participate in part of the process; or for senior leaders who need to know how to commission and interpret gender analyses.
2. **Intermediate:** Appropriate for those practicing gender analysis in day-to-day work; or for those expected to work with experts.
3. **Advanced:** Appropriate for gender advisors or those working in the area of gender equity; or for those who need to be experts in gender analysis.

## How this framework can be used

The framework is appropriate for several applications:

- **Individual assessment:** Individuals can use this framework to evaluate their own competency levels for gender analysis, and use it as a guide for professional development planning.
- **Team assessment:** Managers can use this framework to evaluate a team's capacity to apply gender analysis and identify opportunities for improvement by mapping team members' skill and knowledge levels. The framework could inform managers' decisions on recruitment, performance management and planning for capacity building.
- **Organization development:** Senior leaders can use the framework to identify expertise and gaps within the organization and to align the organization for gender analysis.
- **Resource development:** This framework can be used as a reference guide for the development of training programs, resource lists and other learning opportunities.

## Organizational considerations

This framework is intended for assessing individual-level competencies. However, for gender analysis experts to be effective, they need to operate in a supportive organizational context. This includes: leadership support (including at least a basic level of gender analysis competency on the part of leaders) as well as resources (time, money, personnel) for individuals to develop the competencies and to execute gender analysis. Without these organizational supports, investing in the development of individuals' competencies will have limited impact.

# The 5 W's (What, Why, Where, When and Who of Gender Analysis)

## What: Understand key concepts related to gender

**What is it:** Understanding the language associated with gender, equity, inclusion, and diversity. Understanding concepts such as the difference between sex and gender, sexual orientation, gender identity, the gender spectrum, transgender and other key terms. **Why it is important:** Having a comprehensive understanding of language and theories about equity, gender, gender analysis, and intersectionality allows you to avoid common characterizations and stereotypes, and to engage in gender analysis work more effectively.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Understands key terms used in gender analysis</li> <li>• Recognizes differentiation between sex and gender</li> <li>• Understands the spectrum of gender identity and respects the diverse ways in which people identify themselves</li> <li>• Understands concepts of privilege and gender stereotypes</li> <li>• Understands how gender dynamics can create differing outcomes for different people</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Interrogates own privilege and how it may impact the gender analysis process</li> <li>• Consciously works to challenge gender stereotypes</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Helps others understand gender concepts and how to apply them</li> <li>• Advances discussion of gender issues within the organization</li> <li>• Uses their position as an expert to encourage thoughtful dialogue about gender equity, inclusion, and intersectionality</li> </ul>

## What: Understand how intersectionality impacts outcomes

**What is it:** Understanding that people can be impacted by multiple intersecting identities: ethnicity, race, indigeneity, class, gender identity, sexual orientation, ability, religion, and other identity markers. Recognizing that identity markers (e.g. “woman” and “Black”) do not exist independently of each other, often creating a complex convergence of disadvantage (e.g., Indigenous women, immigrant women of color, women with disabilities). **Why it is important:** Equity cannot exist in parts. When we seek to solve issues of inequity, it is important to consider all layers of it. Without an intersectional lens, many efforts to improve equity may only benefit some potentially more privileged groups (e.g., white women).

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Demonstrates awareness of the concept of intersectionality and the importance of using an intersectional lens</li> <li>• Understands how individuals with varied identities would be impacted differently by products, services, processes or policies</li> <li>• Understands own privilege in comparison to other intersecting identities</li> <li>• Understands the principles behind key frameworks such as the Human Rights, Rights of Indigenous Peoples, Anti-Racism and Anti-Oppression, and the Rights of Persons with Disabilities</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Demonstrates nuanced understanding of the concept of intersecting identities</li> <li>• Seeks out viewpoints of people with intersecting identities to speak to their lived experience</li> <li>• Understands how social power can be and has been used by institutions to marginalize particular groups, and leads to different impacts of products, services, processes or policies</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Facilitates reflective discussion about intersectionality and layered oppression with an ability to manage emotional and challenging conversations about discrimination, privilege and biases</li> <li>• Promotes an inclusive environment that reflects the intersectionality of the team and of the beneficiaries or customers</li> <li>• Leads through actions, validating the experiences of those with overlapping or intersecting identities</li> <li>• Influences others to use empathy when exploring others' lived experiences</li> </ul>

## Why: Understand the benefits of gender analysis

**What it is:** Recognizing and evaluating the benefits of using gender analysis. **Why it is important:** Being able to communicate the potential benefits, impacts, and reasoning of gender analysis creates support for the commitment of resources to gender analysis and for the changes that will be required throughout.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Understands the legal requirements for ensuring equitable impact for beneficiaries or customers</li> <li>Understands the social and economic benefits of ensuring equitable impact for beneficiaries or customers</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Explains what benefits are most relevant for own organization when proposing or implementing a gender analysis</li> <li>Understands and can convey why the organization should apply an intersectional gender lens</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Adapts articulation of benefits to address different audiences or different needs at different points in time</li> <li>Effectively communicates and advocates for gender analysis within the organization</li> </ul>

## Where and when: See opportunities for gender analysis

**What it is:** Understanding the importance of applying a gender analysis beyond areas considered “gendered” domains (e.g., Diversity and Inclusion activities, childcare policy, maternity leave, women in leadership). Seeing how areas often considered “gender neutral” actually have gendered outcomes (e.g., facial recognition technology, industrial uniform design, investment management products, innovation policy). Identifying highest impact areas for using gender analysis. **Why it is important:** Many people assume that gender analysis is only useful in traditionally gendered domains, but there are equal opportunities for impact in areas not explicitly gendered.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Understands how systemic issues of inequity impact products, services, processes and policies</li> <li>Sees that some “gender neutral” domains may actually have gendered outcomes</li> <li>Scans for opportunities for gender analysis</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Identifies ways that gendered assumptions may impact design and development of products, services, processes and policies</li> <li>Recognizes gender stereotypes, biases and assumptions underlying the design of products, services, processes and policies</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Identifies areas within products, services, processes and policies where gender analysis may have the highest impact</li> </ul>

## Who: Determine who in the organization should be involved in gender analysis

**What it is:** Finding the key resources (e.g., data, communications, finance, accountability systems) for applying gender analysis throughout the organization and beyond. Seeing opportunities for cross-departmental collaboration, or collaboration with external stakeholders. **Why it is important:** Often gender analysis and implementation requires collaboration with both internal and external stakeholders who have access to unique data, resources or perspectives.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Identifies people across departments who have resources needed for gender analysis</li> <li>Seeks support from leaders, engaging them throughout the gender analysis process</li> <li>Understands and can access external resources for gender analysis</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Enables effective cross-departmental and external data collection for gender analysis</li> <li>Supports gender analysis “champions” in other departments, areas and organizations</li> <li>Understands effective collaboration practices for cross-departmental work</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Ensures leadership buy-in to the gender analysis process</li> <li>Can trouble shoot issues arising from crossdepartmental collaborations</li> <li>Ensures organizational capacity and structures are in place for collaborations</li> </ul>

# How: Applying Gender Analysis

## Clarify problem statement

**What it is:** Engaging in problem finding, not just problem solving. Using design thinking principles, reframing the challenge through the eyes of target customers and beneficiaries. **Why it is important:** Often initial problem statements are constrained by assumptions. Iterating with emerging quantitative and qualitative data insights can help reframe the problem statement in ways that better reflect the desired impact on customers and beneficiaries.

Developing (Basic)	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Explores unexamined biases or assumptions underlying initial problem statements</li> <li>• Examines why current solutions, if they exist, have failed or are inadequate from the perspectives of customers or beneficiaries</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Reframes the problem statement iteratively with insights from quantitative and qualitative data collection from the eyes of intended customers or beneficiaries</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Challenges self and project team to abandon existing assumptions and solutions</li> <li>• Continuously pushes self and team to focus on customer- or beneficiary-centric insights</li> </ul>

## Collect qualitative data ethically

**What it is:** Collecting information through stakeholder engagement and ethnographic research. Moving beyond high-level consultations that cannot provide rich insights. Understanding and using feminist-centric/anti-oppression approaches to engage with beneficiaries and stakeholders respectfully. **Why it is important:** Engaging with stakeholders (e.g., beneficiaries, customers or other users) can generate deep insights into needs and experiences. These insights allow an understanding of the causes of inequity as well as potential solutions. This must be done based on ethical principles of engagement, ensuring data is being collected, stored, and shared based on the consent of respondents and appropriate legal frameworks.

Developing (Basic)	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Understands how qualitative, community-based research can contribute to problem finding and problem solving</li> <li>• Understands the use of a variety of participatory data collection methods, including interviews, focus groups, and ethnographic methods</li> <li>• Bases data collection on building empathy for the target audiences</li> <li>• Protects confidentiality of vulnerable participants</li> <li>• Appropriately compensates users, beneficiaries and other external stakeholders for participating in data collection/design process</li> <li>• Uses emerging insights to inform the evolution of the problem statement</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Ensures a diversity of customers or beneficiaries is represented, prioritizing an intersectional lens</li> <li>• Recognizes factors that may influence data collection dynamics and results, including but not limited to indigeneity, education, literacy level, gender, lifestyle, immigrant status, differences in ability, socioeconomic status, race, familial status and age</li> <li>• Mitigates psychological, reputational or other risks to research participants</li> <li>• Questions how own bias may impact the way in which data is collected</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Manages the complete qualitative data collection process, from designing research questions, choosing the most effective collection methods to ensuring best practices in execution</li> <li>• Takes responsibility for the ethical considerations in participatory data collection methods</li> </ul>

## Collect gender-disaggregated quantitative data ethically

**What it is:** Collecting gender-disaggregated quantitative data in an ethical way. Creating inclusive data collection methods that encompass those who may be outside cisnormative, binary quantitative data collection categories. Quantitative data collection must ensure data is being collected, stored, and shared based on the consent of respondents and appropriate legal frameworks. **Why it is important:** Many organizations lack gender-disaggregated data which can shape how we understand who is most impacted by inequity.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Locates internal or external sources of gender-disaggregated data on customer or beneficiary needs</li> <li>Ensures gender-disaggregated data also accounts for other intersecting identities.</li> <li>Ensures integrity and representativeness of data</li> <li>Uses ethical principles for collecting, storing and analyzing data to protect the privacy and safety of vulnerable populations</li> <li>Uses emerging insights to inform the evolution of the problem statement</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Identifies data gaps and understands how these will shape analytical outcomes</li> <li>Ensures a diversity of customers or beneficiaries is represented, prioritizing an intersectional lens</li> <li>Recognizes factors that may influence data collection dynamics and results, including but not limited to indigeneity, education, literacy level, gender, lifestyle, immigrant status, differences in ability, socioeconomic status, race, familial status and age</li> <li>Questions how own bias may impact the way in which data is collected</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Designs and executes data collection methods to fill gaps where intersectional gender-disaggregated data does not yet exist</li> <li>Develops partnerships aimed at filling data gaps</li> <li>Takes responsibility for the ethical considerations in quantitative data collection, storage and use</li> </ul>

## Generate integrative insights

**What it is:** Analyzing and interpreting quantitative and qualitative data to uncover hidden bias and opportunities for change or innovation. Using design thinking principles, comparing, contrasting and integrating findings from the quantitative and qualitative analysis to identify needs, pain points and aspirations of the customers, users or beneficiaries. Identifying patterns in the data that contribute to inequity. **Why it is important:** Incorporating multiple sources of rich evidence enables the development of innovative insights into how products, services, processes and policies can be made more equitable or serve unique communities.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Gives weight to both quantitative and qualitative data in synthesizing evidence into insights</li> <li>Collaborates with stakeholders in sensemaking about the different data inputs</li> <li>Searches beyond obvious patterns to understand the underlying drivers, motivations and tensions</li> <li>Allows the data to “speak” rather than imposing pre-dispositions on the data</li> <li>Uses emerging insights to inform the evolution of the problem statement</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Engages in and encourages divergent thinking</li> <li>Creates visual tools, such as persona and journey map, to communicate insights with stakeholder</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Develops conceptual frameworks to guide gender analysis</li> <li>Evaluates emerging findings against previous data to ensure validity of insights</li> <li>Looks for conflicting or contrasting data and develops insights that explain them</li> </ul>

## Design for equity

**What it is:** Using insights generated from quantitative and qualitative data to develop an innovative product, service, process or policy to meet the needs of underserved customers, users or beneficiaries. Engaging stakeholders in iterative design process to ensure desired outcomes are achieved. **Why it is important:** Inclusive design integrates the knowledge of gender equity and intersectionality with human-centered design to create solutions that address inequities.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Applies insights from qualitative and quantitative data to the product, service, process or policy design</li> <li>• Integrates the design process iteratively with the data collection process</li> <li>• Engages customers, users, beneficiaries, and other stakeholders in co-creation</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Identifies the implications and potential impact of inclusive design options (political, economic, legal, social)</li> <li>• Assesses the feasibility and expected outcomes of the proposed gender-inclusive design</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Uses a structured design process to encourage creativity and generate a diversity of ideas</li> <li>• Pushes for game-changing designs based on the data insights</li> <li>• Identifies roadblocks to implementation of design and leads effort to remove them or design around them</li> </ul>

## Rapid prototyping

**What it is:** Using rapid prototyping to quickly and cheaply visualize and bring to life the product, service, process or policy design. Learn quickly from initial trials and iterate on the design to ensure that it responds to the needs of the target constituency (e.g., a mock up website, trials with a small subset of target audience, using simple materials to approximate the product). **Why it is important:** Prototyping cheaply and quickly brings new insights about the design, allowing for an iteration in the design or revised plans for implementation. Prototyping can point out missed opportunities or negative impacts before full implementation.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Uses simple and quick ways to model or visualize designed solutions</li> <li>• Engages with target customers, users or beneficiaries to test prototypes and collects feedback</li> <li>• Uses feedback to revise and improve the design</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Considers limitations of prototypes and testing methods and how they affect testing results</li> <li>• Ensures intersectional diversity in customers, users or beneficiaries for testing</li> <li>• Critically analyzes negative feedback to identify fundamental faults of the design that cause undesirable results</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Identifies or designs cheap and simple prototyping approaches</li> <li>• Asks critical “devil’s advocate” questions to enhance design of product, service, process or policy</li> </ul>

## Equitable resource allocation

**What it is:** Aligning resources to support the product, service, process or policy developed. Ensuring sufficient funds, resources, people, and time are reflected in the resource allocation and budgeting process (in governmental context this is referred to as gender budgeting). **Why it is important:** Equitable resource allocation reinforces responsibility, accountability, and commitment to the gender analysis process and enables implementation of inclusive design solutions.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Understands relevant organizational processes for budgeting, stakeholder alignment and resource allocation</li> <li>• Identifies impact of design solutions (product, service, process or policy) on budgets and other resource allocation</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Collaborates across departments to ensure resource requirements are being incorporated into planning, activities and reporting</li> <li>• Identifies potential risks of inclusive design, and budgets for the ability to re-design and adapt</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Allocates sufficient resources (including finances, capacity building and infrastructure) to enable design implementation</li> <li>• Offers critical analysis of budget proposals across the organization to ensure resource allocation informed by gender analysis</li> </ul>

## Assessing impact

**What it is:** Identifying appropriate metrics to measure impact of the product, service, process or policy. Engaging with customers, users, or beneficiaries and other stakeholders to assess how the product, service, process or policy is being received. Developing a continuous improvement model. **Why it is important:** Measuring impact allows designers to assess if the design of the product, service, process or policy had the intended impact. Impact assessment uses the lived experience of beneficiaries, customers or users for feedback, allowing for course corrections and improvements.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Uses established or new metrics to assess the impact of the product, service, process or policy on customers or beneficiaries</li> <li>• Uses both qualitative and quantitative metrics for impact</li> <li>• Engages directly with customers, users or beneficiaries to identify impacts</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Develops intersectional gender metrics for impact assessment where appropriate metrics do not exist</li> <li>• Analyzes both the intended and unintended consequences or impacts of the product, service, process or policy</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Builds impact assessment into the design process</li> <li>• Anticipates unintended consequences and inequities created by product, service, process or policy</li> </ul>



## Sustainable adaptation

What it is: Undertaking course corrections to enhance the equity and inclusive design of the product, service, process or policy. Engaging diverse beneficiaries, users and customers in the re-design process. **Why it is important:** Because of the possibilities of unintended consequences or unanticipated barriers, products, services, processes and policies need to be adapted based on experience after prototyping and launch. Co-designing with stakeholders based on their feedback will lead to the most robust redesigns.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>• Uses insights from impact assessment to iterate on product, service, process or policy design</li> <li>• Returns to previous quantitative and qualitative data analysis to compare the validity of the hypotheses and redesign based on new insights</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>• Engages with beneficiaries, users, customers, and other stakeholders to make course corrections as needed to enhance or improve the delivery or design of the product, service, process or policy</li> <li>• Tracks "lessons learned" from the design and implementation experience to improve design processes in the future</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>• Identifies new opportunities (e.g., beneficiaries, collaborators, extensions) to improve policy, product, service, process or policy over time</li> <li>• Disseminates gender analysis learnings (including gaps, success and opportunities)</li> <li>• Encourages organizational accountability to gender analysis commitments</li> </ul>

# Organizational and Cultural Support

## Effective collaboration

What it is: Engaging appropriate organizational actors in the gender analysis process. Fostering collaboration across groups to mobilize resources for gender analysis. Sharing accountability and responsibility for equity-related initiatives and design processes in the organization. Why it is important: Solving complex issues requires a diversity of perspectives and cross-departmental expertise. Gender analysis will likely require collaboration across different parts of the organization and with external groups.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Identifies and supports opportunities for collaboration between departments in the organization</li> <li>Shares all equity-related relevant information and seeks other's input</li> <li>Acknowledges other frames of reference and others lived experiences, learning how to gain diverse insights</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Encourages cross-functional/departmental teams to work on gender analysis and inclusive design processes</li> <li>Supports others in acting to increase equity</li> <li>Invites and builds upon the ideas of others in various parts of the organization</li> <li>Facilitates knowledge and capacity building of staff engaging in the gender analysis process</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Identifies and breaks down barriers to collaborative processes in the organization</li> <li>Organizes teams that reflect the diversity of stakeholders</li> <li>Encourages individuals with different lived experience to contribute to design process</li> <li>Arbitrates opposing points of view and stakeholder conflicts</li> </ul>

## Fostering organizational change

What it is: Creating the organizational conditions for success before, during, and after the gender analysis process. Identifying roadblocks for gender analysis (e.g., in culture, collaboration, accountability or leadership support) and creating change management processes to remedy the gaps. Advocating for diverse teams to represent customers or beneficiaries. Why it is important: Gender analysis will be difficult to implement without the appropriate organizational supports in place. An inclusive organizational culture will encourage a successful gender analysis process. It is important for individuals to feel supported and heard throughout the gender analysis process by creating the conditions for meaningful engagement, uncomfortable conversations, and constructive feedback, and advocating for those who should be at the table.

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> <li>Recognizes the value and importance of organizational and team commitment to gender analysis</li> <li>Challenges assumptions, stereotypes, and gender structures in existing practices</li> <li>Advocates for gender analysis, provides leadership support and offers solutions when issues arise</li> </ul>	<p>Basic skills plus:</p> <ul style="list-style-type: none"> <li>Applies an intersectional gender lens to organizational practices</li> <li>Creates safe spaces where people feel comfortable expressing how they feel and having difficult conversations</li> <li>Builds technical capacity of team to facilitate and carry out a gender analysis process</li> <li>Advises on accountability practices and communications plan related to gender analysis</li> </ul>	<p>Intermediate skills plus:</p> <ul style="list-style-type: none"> <li>Leads by example and fosters an organizational culture that values and embeds a gender lens in all areas of work</li> <li>Breaks down barriers to the gender analysis process using knowledge, empathy, and evidence</li> <li>Embeds gender analysis processes in all areas of work in the organization</li> <li>Strengthens the implementation of gender analysis through ongoing evaluation and learning, and sharing of effective practices</li> </ul>