Gender-based Analysis: A Selected Annotated Bibliography[1]

    A. Background and theory on gender-based analysis
    B. Gender-based analysis in research
    C. Gender-based analysis in programs
    D. Gender-based analysis in policy
    E. Evaluating the effectiveness of gender-based analysis

A. Background and Theory on Gender-based Analysis

Health Canada (2003). Exploring Concepts of Gender and Health. Ottawa: Women's
    Health Bureau. http://www.hc-sc.gc.ca/hl-vs/pubs/women-femmes/explor_e.html

This document gives a concise explanation of the basic concepts, terminology and foundations of gender-based analysis. It then reviews the process of integrating GBA into research, policy and program development. The most useful aspect of this resource is the inclusion of four case studies that illustrate how our understanding of a health issue can differ when GBA is implemented and when it is not. Finally, the further reading and resources provided are also helpful.

Kleintjes, S., Prince, B., Cloete, A. & Davids, A., eds (2005). Gender Mainstreaming in
    HIV/AIDS: Seminar Proceedings. Cape Town: HSRC Press.
    http://www.sahara.org.za/index.php/Publications/Publications.html

This compilation of seminar proceedings from the 7th AIDS Impact Conference in Cape Town, South Africa provides a good balance of articles on the concepts of GBA and articles that discuss practical examples of gender mainstreaming in HIV/AIDS. The introduction reviews the evolution of gender mainstreaming and contextualizes it historically. The conference material summarized in this publication focuses on Africa, but it remains a useful resource for any region. It is especially useful if you are interested in gender and HIV/AIDS.

Prince, B., Pugh, S. & Kleintjes, S., eds. (2007). Skills-building for Gender
    Mainstreaming in HIV/AIDS: Seminar Proceedings. Cape Town: HSRC Press.
    http://www.sahara.org.za/index.php/Publications/Publications.html

The second compilation of seminar proceedings from the Social Aspects of HIV/AIDS Research Alliance summarizes papers and capacity building workshops from the 3rd African Conference of SAHARA in Dakar, Senegal. There are some interesting articles on applying GBA to practice that are applicable to a Canadian context. The scenarios at the back of the resources are a good source of practice.

Moser, C. (2005). An Introduction to Gender Audit Methodology: Its design and
    implementation in DFID Malawi. London: Overseas Development Institute.
    http://www.enterprise-impact.org.uk/pdf/GenderAuditMethodology-ODI.pdf

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[1] A few key resources under each theme have been annotated and would be good starting points for people working on gender-based analysis. Further resources are listed for further exploration.

Office of the Special Advisor on Gender Issues and Advancement of Women (2001). Gender Mainstreaming: Strategy for Promoting Gender Equality. New York: United Nations. http://www.un.org/womenwatch/osagi/pdf/factsheet1.pdf

Office of the Special Advisor on Gender Issues and Advancement of Women (2001). Important Concepts Underlying Gender Mainstreaming. New York: United Nations. http://www.un.org/womenwatch/osagi/pdf/factsheet2.pdf

Office of the Special Advisor on Gender Issues and Advancement of Women (2001). The Development of the Gender Mainstreaming Strategy. New York: United Nations. http://www.un.org/womenwatch/osagi/pdf/factsheet3.pdf

Saulnier, C., Bentley, S., Gregor, F., MacNeil, G., Rathwell, T. & Skinner, E. (1999). Gender Mainstreaming: Developing a Conceptual Framework for En-Gendering Healthy Public Policy. Halifax: Atlantic Centre of Excellence for Women's Health. http://www.acewh.dal.ca/e/info/reports.asp#G.

This article provides a succinct review of the theoretical underpinnings of gender based analysis. It examines gender as a concept and as a determinant of health and highlights the difference between sex and gender. It then explores the recent theoretical shift from "women to gender" in policy. Finally it reviews some key terminology and the potential GBA has to transform gender relations.

Status of Women Canada (2002). Canadian Experience in Gender Mainstreaming. Status of Women Canada. Ottawa: Status of Women Canada. http://www.swc-cfc.gc.ca/pubs/0662667352/index_e.html

B. Gender-based Analysis in Research

Almey, M. (2007). Finding data on women: a guide to the major sources at Statistics Canada. Ottawa: Statistics Canada. http://dsp-psd.pwgsc.gc.ca/Collection/SW21-22-2007E.pdf

This is an excellent resource to help researchers navigate through Statistics Canada and find data on women. First, it provides a detailed overview of Statistics Canada's print publication, electronic products and services and major social data sources and surveys. This review is a great introduction for new researchers or a good review for seasoned ones. The resource then goes through general topics, such as population, demography, education, health and family status, and highlights where you can specifically find data on women. Finally, it highlights new research initiatives.

Johnson, J., Greaves, L. & Repta, R. (2007). Better Science with Sex and Gender: A Primer for Health. Vancouver: Women's Health Research Network. http://www.whrn.ca/better-science-download.php

This primer is a comprehensive guide to all areas of health research and policy, including the Canadian Institutes of Health Research four pillars of health research – biomedical, clinical, health systems and social and cultural dimensions. It defines sex and gender, provides suggestions on how to measure sex and gender and gives examples on how to apply sex and gender-based analysis to health research.

C. Gender-based Analysis in Programs

Eckman, A., Huntley, B. and Bhuyan, A. (2005). How to Integrate Gender into HIV/AIDS Programs: Using Lessons Learned from USAID and Partner Organizations. New York: USAID.
http://www.genderandaids.org/modules.php?name=News&file=article&sid=500

World Health Organization (2003). Integrating Gender into HIV/AIDS Programmes: A Review Paper. Geneva: WHO.
http://whqlibdoc.who.int/publications/2003/9241590394.pdf

This paper first reviews gender roles and norms, highlighting how gender-based vulnerabilities increase men and women's risk of HIV/AIDS infection. The paper establishes there is a continuum of approaches to HIV/AIDS programming: harmful, gender-sensitive, transformative and empowering. Each approach to HIV/AIDS programming is reviewed and suggestions are made to avoid harm and successfully develop transformative, empowering programs. Real-life examples are given throughout the text to help contextualize the information. Finally, the paper briefly explains the structural elements needed to integrate gender-based analysis into programming and identifies future challenges.

D. Gender-based Analysis in Policy

Commonwealth Secretariat and Maritime Centre of Excellence for Women's Health. (2002). Gender Mainstreaming in HIV/AIDS: Taking a Multisectoral Approach. London: London: Commonwealth Secretariat and Atlantic Centre of Excellence for Women's Health.

New South Wales Office for Women (2003). Applying a Gender Lens: A practical guide to gender analysis for NSW government agencies. Sydney: Office for Women.
http://www.women.nsw.gov.au/PDF/Archived/Applying_a_gender_lens.pdf

Health Canada (2000). Health Canada's Gender-based Analysis Policy. Ottawa: Health Canada. http://www.hc-sc.gc.ca/hl-vs/alt_formats/hpb-dgps/pdf/gba.pdf

This resource is useful because it gives the reader an operational understanding of Health Canada's and, to a lesser extent, the Canadian government's gender-based analysis policy. It outlines the recent legislative history of gender equality, why they have adopted this position and who is responsible for implementing GBA in Health Canada. It also reviews the key concepts and terminology of GBA. The bibliography is a good resource if you would like further reading on Canadian and international gender policy, although it is a bit dated.

Pederson, A. (2001). Gender-Inclusive Health Planning: A Guide for Health Authorities in British Columbia. Victoria: BC Ministry of Health Services.
http://www.healthservices.gov.bc.ca/library/publications/year/2001/gender_inclusive.pdf

Saulnier, C., Bentley, S., Gregor, F., Rathwell, T. & Skinner, E. (1999). Gender Planning: Developing an Operational Framework for En-Gendering Health Public Policy. Halifax: Atlantic Centre of Excellence for Women's Health. http://www.acewh.dal.ca/e/info/reports.asp#G.

Status of Women Canada (1998). Gender-based Analysis: A guide for policy-making. Ottawa: Status of Women Canada. Ottawa: Status of Women Canada. http://www.swc-cfc.gc.ca/pubs/gbaguide/gbaguide_e.html

This is a clear, well written, practical guide to integrating gender-based analysis into public policy. First, this resource defines GBA, explores its key concepts and outlines the rationale for the Canadian government's adoption of GBA. Then, the resource explains how gender fits into policy, the value of including GBA in policy and explores gender stereotypes. It then takes the reader through the methodology of GBA. Each step of the policy cycle is reviewed with and without the use of GBA. The resource illustrates how to integrate gender-based analysis at each stage by providing a series of questions targeted at gender. Real life examples are also given for practice.

World Health Organization (2002). Integrating Gender Perspectives in the Work of the WHO: WHO Gender Policy. Geneva: WHO. http://www.who.int/gender/documents/engpolicy.pdf

E. Evaluating the Effectiveness of Gender-based Analysis

Booth, C. & Bennett, C. (2002). Gender Mainstreaming in the European Union. *The European Journal of Women's Studies*, 9 (4), 420 – 446.

Daly, M. (2005). Gender Mainstreaming in Theory and Practice. *Social Politics*, 12 (3), 433 – 450.

De Waal, M. (2006). Evaluating gender mainstreaming in development projects. *Development in Practice*, 16 (4), 209 – 214.

Eveline, J. & Bacchi, C. (2005). What are We Mainstreaming When We Mainstream Gender? *International Feminist Journal of Politics*, 7 (4), 496 – 512.

Hankivsky, O. (2005). Gender vs. Diversity Mainstreaming: A Preliminary Examination of the Role and Transformative Potential of Feminist Theory. *Canadian Journal of Political Science*, 38 (4), 977 – 1001.

Hankivsky's critique challenges the popular assertion that GBA is an effective analytical tool that can transform public policy. She argues that the GBA's theoretical foundation is flawed because it is disconnected from recent feminist theory and debates and, as a result, needs reworking. She then presents diversity mainstreaming as an alternative analytical tool to GBA. Diversity mainstreaming uses multiple forms of discrimination, such as race, class, gender and sexual orientation, as a lens to examine a public policy or research problem. Hankivsky asserts that diversity mainstreaming is better equipped to analyze and identify diversity among men and women as well as across genders.

Hannan, C. (2001). Gender mainstreaming – a strategy for promoting gender equality: With particular focus on HIV/AIDS and racism. New York: United Nations. http://www.un.org/womenwatch/osagi/pdf/gmstrategyhivaids.PDF

Hannan reviews the methods employed by the United Nations to integrate gender mainstreaming into their organization and research. She then goes on to discuss gender mainstreaming in relation to HIV/AIDS and racism. Hannan argues, like Hankivsky, that the intersection of gender and racial discrimination is prominent and advocates that both gender and race should be considered in analysis or the issue will remain inadequately addressed. However, Hannan asserts that gender-based analysis is still "one of the most effective means for the United Nations to support real change at all levels" and suggests gender-based analysis be employed along with a diversity analysis.

Moser, C. (2005). Has Gender Mainstreaming Failed? *International Feminist Journal of Politics*, 7 (4), 576 – 590.

Moser examines the experiences of governmental development agencies, multilaterals and civil society in gender mainstreaming to determine its effectiveness. She measures each organization's performance against four indicators of success – embracing terminology, getting a gender mainstreaming policy into place, implementing gender mainstreaming in practice and evaluating practices of gender mainstreaming. Her evaluation reveals that greater advances have been made in some stages than others. Moser emphasizes that the integration of gender mainstreaming in practice is an ambitious task and must be viewed as a process rather than a goal. Most importantly, she advocates for the improvement of methodology and evaluation and monitoring.

Rees, T. (2005). Reflections on the Uneven Development of Gender Mainstreaming in Europe. *International Feminist Journal of Politics*, 7 (4), 555 – 574.

Office of the Special Advisor on Gender Issues and Advancement of Women (2001). Positive impacts from incorporating gender perspectives into the substantive work of the United Nations. New York: United Nations. http://www.un.org/womenwatch/osagi/pdf/factsheet4.pdf

Veitch, J. (2005). Looking at Gender Mainstreaming in the UK Government. *International Feminist Journal of Politics*, 7 (4), 600 – 606.

Walby, S. (2005). Introduction: Comparative Gender Mainstreaming in a Global Era. *International Feminist Journal of Politics*, 7 (4), 453 – 470.

Wallace, T. (1998). Institutionalizing gender in UK NGOs. *Development in Practice*, 8 (2), 159 – 172.