

Introduction

This Gender based analysis Guide is an update of the 1999 Guide and is produced by the Women's Issues Branch, Executive Council Office. The Women's Issues Branch wishes to acknowledge the work of other organizations that has contributed to this Guide. In particular, the Saskatchewan Women's Secretariat was most generous in allowing us to adapt their work in developing the original guide for New Brunswick.

Gender permeates all facets of our lives, making the need for gender based analysis go beyond those policies that are specifically targeted at women. Policies related to health, finance, the environment, or even transportation all have the potential to either perpetuate gender-based inequities or to alleviate them in some way.

This Guide has been designed to assist departments and agencies in developing policies and programs that are equitable to both men and women. It sets out some of the key principles to be used in conducting gender based analysis and provides a quick 'checklist' as Appendix A. Key factors that impact women's lives are discussed so that the necessity of conducting gender based analysis is more fully understood. Factors such as family status, income and earnings, and violence against women are addressed and potential policy implications and case study examples are included to provide additional clarification.

What is Gender Based Analysis?

"Gender based analysis is an integrated and systematic process of research and analysis that takes both men and women into account using a variety of quantitative and qualitative data. This data is considered in the policy and program development cycle. It is a process that examines the differences in women's and men's lives, and identifies the potential impact of policies and programs in relation to these differences." (Women's Policy Office, p. 9)

“The cornerstones of gender based analysis are:

- collecting good information;
- understanding gender trends in the economy and society; and
- using this knowledge and understanding to discover potential problems and solutions in your daily policy work.” (Women’s Policy Office, p. 9)

There are two fundamental questions that characterize the essence of gender based analysis, and that policy analysts should be able to answer:

- *Does the program or policy support full participation and equality for women and men?*
- *Does the program or policy in question discriminate against men or women in its outcomes?*

Benefits of Gender Based Analysis

Policy development and service delivery are becoming increasingly complicated. Government administrators, researchers, and analysts are struggling to accommodate the interests of many different groups. For example, at one time the nuclear family was the norm. Today, policies and programs must be designed to meet the needs, not only of two-parent families, but also of lone-parent, blended, common-law, and other family types. Likewise, at one time labour force policies and programs were directed primarily toward adult males who responded to few family demands. The New Brunswick labour force is now split almost equally between men and women and most of these workers have family as well as employment responsibilities.

The benefits of conducting gender based analysis include:

- more informed decision-making resulting in more likelihood of programs and policies achieving their objectives for women as well as men;
- detailed client information derived through gender based analysis which assists in the development and delivery of cost-effective, efficient, and effective programs and services;

- identification of the policies and programs that have worked well to advance the status of women or those that have a negative impact on women and need to be amended.

Guiding Principles of Gender Based Analysis

Four guiding principles are proposed as a framework for incorporating issues of gender into the policy development process - Reflect on Values; Consider Key Factors in Women's Lives; Gather Comprehensive Information; and, Incorporate Gender into the Communications Strategy.

These principles of gender based analysis do not exist in isolation, but have a mutually-dependent relationship with each other. They are intended to be integrated in a holistic way throughout the policy development and decision-making process.

Guiding Principle: Reflect on Values

Our actions, and the decisions we make, are informed by values that have been shaped by a variety of factors in our lives including race, education, culture, geography, socioeconomic position, and gender, among others. In turn, these values that inform who we are - individually, organizationally and as a society - have the potential to impact every stage of the policy development process, from defining the issue to designing and implementing the evaluation.

When conducting gender based analysis, it is of fundamental importance to reflect on our own values and on the values of the organizations and structures in which we function; being conscious of how these can both enhance and limit our analytical ability. In short, how have our life experiences and socio-economic position shaped our perspective?

As long as human dignity and meaning exist as important values, social science cannot achieve the rigour of the physical sciences because it is impossible to separate human beliefs from the context and process of analysis.Today, many students of policy analysis agree that it is important to consider values in the process of policy analysis....

**Heineman, R.,
Bluhm, W.T.,
Peterson, S. and
Kearny, E.
*The World of the Policy
Analyst: Rationality and
Decision-Making,
1990***

Guiding Principle: Consider Key Factors in Women's Lives

Equity does not mean treating people the same. Rather, equity acknowledges that because of life conditions or past discrimination the different treatment of women and men may sometimes be necessary in order to achieve the same results.

Conducting gender based analysis requires consideration of “key factors” that affect women’s lives, and an understanding of how these factors can impact men and women differently. Key factors such as earnings, family status, and violence against women have been presented in this section. Brief discussions of potential policy implications and case study examples are included to demonstrate the use of gender based analysis.

Key Factor: Earnings

Women working in the paid labour force earn less than their male counterparts. The difference in earnings is due to a wide variety of factors, including occupational segregation, the disproportionate amount of unpaid work performed by women in caring for children and others, the number of hours worked, labour market experience as well as gender discrimination.

In New Brunswick, in 2004, women who worked full-time earned on average \$563.63 per week compared to the average \$708.20 per week earned by men, or 79.6 percent.

Women have been getting more education and staying in the labour market longer. Women are doing everything right, and still this is happening. Progress has stopped." - Heidi Hartmann, Director of the Institute for Women's Policy Research, Washington, D.C., speaking about the recent findings that the gender pay gap had widened between 1995 and 2000 in the 10 industries that employ the most women in the U.S.

The gap is even greater when comparing all earners (full and part-time)-women, on average, earned 73 percent of what men in New Brunswick earned in the same year. (Source: Statistics Canada - Labour Force Survey (71F0004XCB))

Potential Policy Implications: A traditional approach to economic analysis fails to recognize the economic roles women play by providing unpaid care for children, the elderly and other dependents in addition to

performing a myriad of tasks that are commonly referred to as “housework”. When women have contributed to the economic well-being of their families and communities by engaging in unpaid work, they are not compensated, but are further marginalized by being denied access to work-related benefits such as workers compensation, employment insurance, paid sick leave, etc. Low earnings also have long-term repercussions related to pensions that could lead to policy implications in the areas of income support and health.

Old Age Security (OAS) is one benefit that has recognized the valuable contribution that senior women have made to society throughout their lifetimes as unpaid workers. Proposed changes to the OAS would have reduced or eliminated this benefit to women in families. (See Case Study Example 2, p. 11.) The federal government has since reversed its decision to implement the Seniors Benefit.

Key Factor: Family Status

Dual-earner Families: The majority of families today are comprised of a husband and a wife (either married or common law). In these families, men and women have different experiences in relation to work, both paid and unpaid. In two parent families with a child under the age of six, where the parents both work full-time, it might be expected that there would be a relatively small gender imbalance in paid and unpaid work. However, data released in 1997 by Federal-Provincial/Territorial Ministers responsible for the Status of Women revealed that there exists a serious imbalance in paid and unpaid work, even in dual earner families. This research found that women performed most of the work that primarily benefits children, even when employed full-time. This is the case whether or not their spouses are employed full-time.

Potential Policy Implications: The disproportionate share of unpaid work performed by women should be taken into account as it invariably impacts women’s capacity to perform paid work during prime work years and, in the long run, impacts women’s capacity to save for retirement. This, in turn, has implications for social policy and program design. It also has implications for businesses and other organizations, which need to take familial needs into account if they are to retain women as employees and/or serve them effectively.

Workplace initiatives designed to make the workplace more “family friendly” give women the opportunity to participate in the labour force on more equal terms with men, and would also make it possible for more men to share in the benefits of increasing the amount of time dedicated to family responsibilities. Both women and men need access to a range

of workplace supports, such as flex time, job sharing and family responsibility leaves. Single parents are likely to need even more supports and flexible arrangements to balance work and family life.

When adjustments are made to health and social support programs, it is critical to recognize that women assume the vast majority of care-giving responsibilities for the family. Therefore, women are most directly impacted by reductions in the levels of support allocated health and social programs. For example, devising a community-based strategy to reduce the level of long-term care facilities would necessitate consultation with women who are the primary caregivers and who are in a better position to more accurately comment on the need for alternative support services.

Lone Parent Families: The proportion of families headed by a lone parent is increasing. In New Brunswick, in 1986, there were over 24,860 families headed by a lone parent, representing 13 per cent of all families. By 2001, the number of lone parent families had increased to 32,734, representing 15 percent of all families. Of these lone parent families, 84% were headed by women. (Statistics Canada, Preliminary Postcensal Estimates)

Poverty in lone parent households is highly dependent on the gender of the household head. In 1999, in New Brunswick, lone parent families headed by women had average family income of \$20,484 compared to those headed by men whose average family income was \$29,358. (Statistics Canada, Income Trends in Canada, 1980-1999)

Potential Policy Implications:

The literature on single parent families indicates that for many female lone parents, finding and maintaining employment is difficult due to low educational attainment, minimal training or work experience, lack of accessible child care, and transportation needs.

Over 70% of part-time workers are women and many of these are employed in the retail sector. Because the hours of work in this sector extend beyond those in which public transportation and licensed day care operate, this type of work is extremely difficult for single mothers. HRD-NB's policy to extend its Day Care Assistance Program to pay for 'alternate' child care provisions has taken these factors into consideration and alleviated one of the barriers to employment in this sector.

Key Factor: Violence Against Women

Violence against women - in the home and at work - is widespread, regardless of economic class or cultural background. Violence has long-term detrimental affects on women's economic, social, and psychological well-being. Women's experiences of violence limit their expectations and the choices they make throughout their lives.

The financial costs to society of violence against women has been estimated to exceed \$4 billion annually in Canada.¹ Statistics, while underestimated, reflect that nearly half of all New Brunswick women, or 46% percent, have experienced at least one incident of physical or sexual violence since the age of 16.² Assaults by a spouse are the most common form of violence, with over one in four New Brunswick women, or 26 percent, reporting at least one incident.³ In 84% of the criminal harassment (stalking) charges laid in New Brunswick between April 1, 2000 and March 31, 2001, the victims were women. (NB Justice Information Service)

It is critical to recognize that sexual harassment exists on a continuum of violence against women when we consider that virtually every act of sexual assault begins with some type of harassment - looks, touches or comments. Women are more likely to receive unwanted sexual attention than men, and it serves to remind women of their vulnerability.

Potential Policy Implications: There is a link between women's experiences of violence and the impact this has on their ability to function independently and participate more fully in society. Women who live in the daily presence or threat of violence will be less able to concentrate beyond their immediate need for safety. In addition, experiences of sexual harassment in the workplace can also prevent women from pursuing their career aspirations, and in some instances can drive them out of the workplace. To address this issue, education can be a significant step in helping women to regain their independence and self-sufficiency. However, it is critical that women's experiences of violence are considered when developing programs. In the case of an educational program, for example, the likelihood of women's success will be increased by including provisions for women-only classes with female instructors, the development and implementation of effective policies, procedures, and educational strategies to address sexual harassment, the use of women-centred course curriculums and the integration of support mechanisms into the program.

¹ Centre for Research on Violence Against Women and Children. *Selected Estimates of the Costs of Violence Against Women*. London, ON. 1998.

² Statistics Canada. *The Daily*. Catalogue 11-001E. Ottawa, Canada. 1993.

³ Statistics Canada, *Wife Assault: The Findings of a National Survey*. 1994.

Case Study Example 1

Participation rates of women in non-traditional fields of study, (i.e. trades, technology, math, science, and engineering), in New Brunswick are, in most cases, extremely low. This is a major concern since the economic status of women is a high priority and wages in these fields tend to be higher than in traditional fields. Applying a gender equity framework to this issue raises some important policy questions. Answering these questions requires access to reliable, gender disaggregated data about training programs, including the needs and goals of clients.

- Are there barriers to women's participation in these fields of study or to employment in these fields which have not previously been addressed?
- Is non-biased career counselling available? Are women encouraged to enter non-traditional fields? If they choose to do so, is the choice supported?
- Have former female students of such courses been consulted for feedback on their experiences?
- Have the courses been promoted? That is, have there been any promotions specifically targeted at women?
- Are there female instructors in these fields? Are there any women only classes?

Case Study Example 2*

Background

The federal government had proposed replacing the combined Old Age Security - Guaranteed Income Supplement (OAS/GIS) with the Seniors Benefit by 2001. The current retirement system uses individual income as the basis for OAS benefits for all seniors and family income to determine supplemental (GIS) benefits for low income seniors. The Seniors Benefit would have been tax free and would incorporate the existing age and pension income tax credits. For couples, the amount of the payment would have been determined on the basis of the combined income of spouses. The following case uses an example from the 1996 Federal Budget Document.

The Case

Carolina is a homemaker and Antonio is a small business operator. Under the current system, by 2001, the net benefit to them from OAS/GIS would be \$8,180 and under the new system the net benefit would be \$8,310, a gain of \$130 for the family.

The Analysis

Conducting a gender based analysis reveals what this change in benefit structure means to them as individuals. Because the Old Age Security (OAS) was received by all individuals regardless of household income (those with high incomes paid all or most back through a high income recovery tax), Carolina would receive \$5,160 per year by 2001. As she has no other income, she would not pay any tax on her OAS. Antonio, on the other hand, receives the same OAS payment as Carolina, but is required to pay tax on the benefit. His taxes are somewhat off-set through a partially income-tested age credit, and when all tax interactions are taken into account, Antonio's net benefit is \$3,020.

Under the proposed Seniors Benefit, both Antonio and Carolina receive tax-free payments of \$8,310 per year, which are divided equally between the two, amounting to \$4,155 each. Thus, by considering them as two individuals, and not as a couple, it is evident that Carolina receives \$1,005 less per year while Antonio receives an increase of \$1,135 per year.

The case of the Seniors Benefit demonstrates the need to take gender into account within the family household. An important test for any social policy or program implementation is its impact on gender economic equality.

*Saskatchewan Women's Secretariat. (1997) *Gender-Inclusive Analysis: A Guide for Policy Analysts, Researchers, Program Managers and Decision-Makers*

Guiding Principle: Gather Comprehensive Information

Information gathering is an essential component of the policy making process, from issue identification to evaluation. A gender-inclusive approach to gathering information works to ensure that gender is incorporated as a category of analysis.

The purpose of gathering gender-based information is to provide decision makers with information that will allow them to gain a more comprehensive understanding of social, political and economic issues by revealing and explaining the differential impact of gender.

Integrating gender-based information throughout the policy development process also helps to ensure that policy and programs are designed and implemented to more effectively meet the needs of both women and men.

Include Gender in the Research Design

At the most basic level, gender based analysis requires that data be disaggregated by gender. In addition, because diversity is an important factor, information on equity groups such as Aboriginal peoples, visible minority and immigrant people, people with disabilities and so forth, must also be gender disaggregated. It is important to ensure that gender disaggregated data are used at every level of analysis.

Consider Gender Differences in Developing Program Goals and Objectives

Ideally, programs aimed at meeting the needs of both men and women should be designed with the input of both genders to ensure that goals and objectives are well-informed and realistic. In order to achieve this, the perspectives of those who have participated in previous programs as well as those who have developed and delivered programs ought to be included. In addition, if any group is significantly under-represented among participants, compared to the estimate of intended beneficiaries, it is useful to include information on why those who met the eligibility criteria did not participate.

Gender-based information about the realities of men's and women's lives will ensure that goals and objectives are developed to accurately reflect the needs of participants. For example, a program providing computer or other technical training for men and women who have been unemployed for long periods of time may also serve to increase participants' self-confidence. An increase in self-confidence may not have been identified

as an intended program outcome but it may be very important from the perspectives of women participants who are more likely to have histories of violence, and could have positive implications for them seeking employment in the future. Limiting the program objectives to a measurement of the technical skills acquired, without considering other outcomes in areas such as self-confidence and personal development, results in a less comprehensive and sometimes misleading assessment of program outcomes.

Utilize Quantitative and Qualitative Research

A combination of both quantitative and qualitative research methodologies are useful to identify and determine the gender-based implications of policy and program options. Quantitative research is valuable for providing solid structural information about policies and programs. However, quantitative research tends to be limited by a lack of subjective and personalized information.

Traditional data sources often do not break down data by gender, or consider how gender-specific factors can affect the anticipated outcomes of a particular policy or program. For example, harassment or difficulties with child care can limit positive program outcomes for women participants. Furthermore, traditional research methods, particularly related to health, have tended to exclude women as researchers or as subjects of the research, thus limiting their applicability to women. For example, early pharmaceutical research done to develop treatments for heart disease was based on male test groups, which proved to have limited application to women.

In contrast, while qualitative research methods tend to require more resources to collect, analyze and present the information gathered, they are a highly effective and valuable means of alleviating the lack of gender-specific data by providing information based on personal experience and observation.

Consultation

Consultation is a fundamental means of collecting qualitative data. It helps ensure that meaningful and comprehensive information is gathered, from both within and outside government, and used to inform the policy-development process. Consultation is particularly effective for reaching women and providing them with an opportunity to participate in the development of public policy and programs that takes their perspectives and needs into consideration.

Most decision-makers understand that including the public in planning has many advantages - new programs are better understood and, therefore, utilized more effectively by the community. In addition, negative feedback resulting from new legislation is minimized and positive feedback is more likely because the viewpoints of stakeholders have been considered in the design and implementation processes.

Guiding Principle: Incorporate Gender into the Communications Strategy

The following identifies ways in which to incorporate gender into components of the communications strategy:

- ⇒ *Goals and Objectives* - consider targeting the strategy at a specific segment of the population or equity group.
- ⇒ *Background/Situation Analysis* - include gender-inclusive research as one basis for developing the strategy's goals and objectives. For example, if directing a program at people with disabilities, the communications strategy should include research on the standard of living, rate of employment and educational achievement for both men and women. Highlighting the higher rates of unemployment and violence experienced by women with disabilities may become a critical component of rationalizing specific programs targeted to meet the needs of this group.
- ⇒ *Audience or stakeholders* - consider separating women from men as an audience or stakeholder group, and consider how to target them in the communications strategy. For example, if the objective is to encourage young people to play hockey, it is important to feature interviews or commercials with women as well as men who are involved in the sport.
- ⇒ *Timeline and budget* - consider how the strategy's timeline and budget will be affected by targeting women. For example, if delivering

workshops to women participants, costs associated with providing transportation and child care may have to be included. The timeline may have to be spread over a longer period of time in order to accommodate family-related responsibilities that women often assume.

⇒ *Evaluation* - consider the effectiveness of the strategy as it relates to impacting women. Gathering the feedback of women who were involved in the initiative will be helpful. The evaluation process can help reveal weaknesses and strengths in the strategy that can then be used to inform future work.

Glossary of Key Terms

Gender - while sex identifies the biological differences between women and men, gender refers to the socially-constructed roles and responsibilities of men and women, girls and boys. Gender is a relational term, referring to the relationship that exists between women and men. The roles and expectations of men and women are affected by the variables of economics, race, culture and class.

Gender Equity - moves beyond the importance of equal treatment to focus on equality of results. It requires the differential treatment of groups in order to end inequality and foster autonomy. Therefore, in order to level the playing field for men and women, measures may be necessary to compensate for the historical and social disadvantages that women have experienced.

Gender Equality - means that women and men enjoy the same status, and experience equal conditions for fully realizing their human rights to contribute and benefit from participating in a range of political, economic, social and cultural endeavours.

Gender Division of Labour - provides a key starting point for considering gender based analysis by revealing the gender or sexual division of labour (including both paid and unpaid work), which both allocates and restricts access to certain labour on the basis of gender. The gender-division of labour organizes all productive activity, thus providing an economic analysis as well as insight into the relative power that accumulates in a society on the basis of gender.

Gender based analysis - identifies how public policy can affect women and men differently; and in what ways policy and programs can be developed to ensure equitable results for both men and women.

Gender-neutral Analysis - assumes that all people are affected by policies/programs in the same way, or that policies/programs have a neutral impact on recipients. It is premised on the theory that all people are already equal, therefore, treating all people the same way is fair. Gender-neutral analysis may not result in equitable outcomes for men and women.

Diversity - refers to a wide range of factors such as Aboriginal status, disability, age, race, ethnicity, family status, sexual orientation, and

geographic location and how they can interact with gender in ways that will produce different outcomes for men and women.

Employment Equity Program - measures taken to ensure that the composition of employees in a workplace more closely represent the general population. It is used as a means of enabling all groups to benefit from contributing to the economic well-being of their community.

Public Policy - means by which government, at federal, provincial/territorial, and municipal levels, carries out its decisions, through various courses of action including the development and implementation of acts, regulations, guidelines, programs and standards.

Systemic Discrimination - occurs when policies and practices are built into systems that have the effect of excluding women and other equity-seeking groups. It is often a mixture of intentional and unintentional actions that may not exclude all members of a group, but will have a more serious effect on one group than on others. The remedy often requires measures to “change the system”, such as employment equity programs.

Suggested Questions to be Answered
When Applying Gender Analysis

1. Is information available to permit analysis of the impact of the policy or program on men and on women separately? If not, what is needed to make such information available?
2. Has consideration been given to the impact of the program on men and women separately?
3. Is there evidence of significantly different impact on men and on women?
4. Does data indicate that there could be barriers to women participating in the program? If so, are there changes that could be made to ameliorate the situation?
5. Are there differences in the life experiences of men and women (i.e. family responsibilities, income differences, violence) that could affect the outcome on men and women differently?

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