**Partner Guidance: Statement of Work (SOW) Suggested Template for Gender Analysis**

**[INSERT Partner Name]**

Statement of Work

Date Services Performed By: Services Performed For:

[INSERT Date] [INSERT Name] [INSERT Partner Name]

*This document is intended as a guide for USAID/BHA partners in developing statements of work (SOWs) associated with the gender analysis. Core components and contents of a SOW are outlined below. Partners should tailor or modify this guidance to fit the specific needs of their activity or research questions. Preliminary SOWs can be used in the recruitment of qualified research partners (e.g. university groups, consultants) or in development of plans to carry out research internally. If contracting out research activities, a proposal would typically be submitted by applicants responding to the SOW.*



**Gender analysis** (as defined in ADS 205) is an analytic, social science tool that is used to identify, understand, and explain gaps between males and females that exist in households, communities, and countries, and the relevance of gender norms and power relations in a specific context. Such analysis typically involves examining the:

* Differences in the status of women and men and their differential access to assets, resources, opportunities and services;
* Influence of gender roles and norms on the division of time between paid employment, unpaid work (including subsistence production and care for family members), and volunteer activities;
* Influence of gender roles and norms on leadership roles and decision-making; constraints, opportunities, and entry points for narrowing gender gaps and empowering females; and
* Potential differential impacts of development policies and programs on males and females, including unintended or negative consequences. (USAID 2011)

All resilience food security activities (RFSAs) are required to complete a gender analysis within the first year of their award to increase the understanding of gender dynamics within the target area, inform design, and strengthen interventions supporting the theory of change (ToC). The gender analysis is therefore a critical step in refining activity design and implementation. Five key questions should drive your approach to planning and implementing the gender analysis:

* What do you know about the gender, youth, age, life-stage, and social dynamics context that can impede or facilitate progress along the activity theory of change (ToC)? And how do you know what you know – what evidence is it based on?
* What do you not know about the gender, youth, age, life-stage, and social dynamics context that can impede or facilitate progress along the activity ToC?

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* What do you need to know about the gender, youth, age, life-stage, and social dynamics issues that could affect activity implementation, participation, and outcomes?
* What is your planned methodology to collect the information? How do you intend to apply the learning and information from this analysis to your activity ToC, design and implementation?

Also consider the following when thinking through what the focus of the gender analysis should be:

* How current and changing trends in gender norms, expectations, and values may affect activity implementation. What “new” information needs to be gathered that will be important for this specific project and associated activities.
* Ways that gender roles and relations might affect the following for both women and

men, young men and women, girls and boys:

* + Access to planned interventions
  + Decision making and behavior change related to behaviors and practices promoted by the activity
* Gender relations in different contexts including individual, partners, family and communities, health care and other institutions, and policies

# Problem Statement

* A few sentences that articulate the key gender, youth, and social dynamics issues that affect efforts to improve food security, resilience, and nutrition in context of your activity theory of change (ToC) and where you will be working to implement activities

# Justification of Research Questions

Clearly state what the research questions are with regard to gender, youth, age, life-stage, social dynamics, and inclusion, in the context of the activity ToC and implementation area and justify why these are the main questions this gender analysis will focus on, based on: (1-2 paragraphs)

* An analysis of activity ToC that identifies the main cross-cutting thematic areas/domains1 of gender, youth, age, life-stage, social dynamics, and inclusion that need to be understood to strengthen the activity ToC and its purposes, design and implementation of field-level interventions (what are the cross-cutting gender, age, and social dynamics issues that are relevant to all or most of the ToC purposes? – for example access to and control over resources, decision-making, male engagement, social norms, marriage practices etc.)
* An overview of existing literature, secondary sources of information and data that provides some insights into what these gender, youth, age, life-stage, social dynamics, and inclusion issues may be in the implementation area to the extent possible, noting key gaps in information and data as well. This includes consideration of past and current programming documents in the implementation area.

The gender analysis should be tailored to the activity ToC and local context where the activity will be implemented, and should build on existing secondary data and information that may be

1 The domains of analysis should align with what is relevant to the activity ToC. The ADS 205 identifies some domains, but there may be additional domains of analysis that are important and relevant to include given your context, for example marriage and marriage practices, or socio-cultural norms.

available and relevant from the region, country, or local context. A matrix of the key questions by thematic area/domain by purpose would also be helpful to include. An illustrative example is provided below.

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**Illustrative Table 1. Key research questions by gender, youth, age, life-stage and social dynamics thematic areas/domains by ToC purpose**

|  |  |  |  |
| --- | --- | --- | --- |
| Thematic Area/Domain | ToC Purpose 1 | ToC Purpose 2 | ToC Purpose 3 |
| Add thematic areas/ domain | Add research questions |  |  |
|  |  |  |  |
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# Key Research Objectives

* A bulleted list of key study objectives that are specific and measurable

# Justification of Research Design and Methods



*Please note that BHA does not endorse or recommend specific research methods but encourages partners to use methods that best answer the goals of the research, research questions, and of the overall activity. However, most gender analyses rely on a literature review of existing secondary data, peer- reviewed literature, and grey literature, and primary qualitative data collection and analysis that include a range of tools and approaches.*

Based on the key research questions to be answered, a description of research methods in 2 - 3 paragraphs and a table of proposed data collection methods and informants should be included by location of where the data will be collected. An illustrative table is provided below.

Importantly, the following questions should be answered in describing the selected research methods and approach:

* + Where will you go to collect data and what is the justification for selecting those areas (Why)?
  + Who will you talk to in each area and why?
  + Which methods will you use for each type of informant/study participant and why?
  + For each area, method, and informant type – how many (interviews, FGDs etc) will you do and why?
  + How will the data be managed? (translation, transcription, coding, analysis, data protection)

## Sampling Frame: Where data will be collected and why.

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The SOW should provide information on how many and which geographic locations have been selected, a justification for the proposed geographic locations and sampling frame, and provide an approximate sample size in each selected geographic location where data will be collected for the reader to understand the general scope of the activity. Most qualitative data collection uses purposive sampling and sample sizes should not be too large (see illustrative table 2 below). It is important to consider whether the population in the program area is diverse or quite homogenous. Other important social dynamics should be considered in developing the sampling frame. Are there important religious, ethnic, or socio-cultural differences? For example, are there matrilineal and patrilineal communities? Or pastoralists versus landed farmers? Whether the communities are similar or different the sampling frame should be small, but the choice of each geographic area included in the analysis should be justified based on what distinguishes them from other communities or groups. Although a RFSA may cover a large area, this in and of itself it is not justification enough to go to all the implementation areas to collect data. This can be expensive and time-consuming with little data collected from each area, yielding less meaningful results.

## Data Collection Methods: Who will you talk to in each area and why? Which methods will you use for each type of informant/study participant and why? For each area, method, and informant type – how many (interviews, FGDs etc.) will you do and why?

Usually qualitative data collection should include a variety of methods and types of informants so that the data collected using one method can be triangulated (compared and contrasted) with the data collected using another method to ensure a sound understanding of common patterns and variation in the data. Data collection methods can include participatory methods such as mapping or seasonal calendars to get an understanding of how things usually happen in their communities, focus group discussions (FGD), key informant interviews (KII), semi-structured interviews (SSI), and in-depth interviews (IDI) for example. Data collection should also include a variety of informants and study participants, and often participants in focus groups may be grouped by sex and/or age. Selecting specific types or groups of informants depends on the key questions that need answers. Examples of informants/study participants include, but is not limited to: mothers of children under two or five, fathers of children under two, women farmers, men farmers, male youth or female youth, adolescent girls and boys, grandmothers, community elders, health providers, local government officials etc. Note that interviewing adolescents, and discussing sensitive topics, often requires ethical review, and in every instance, there should be a plan to obtain informed consent from participants/informants. For more information regarding institutional review board (IRB) requirements see the ADS on Protection of Human Subjects in Research Supported by USAID (ADS 200)2.

Describe how the data will be collected, for example who will collect data? Who will conduct interviews and who will take notes and record the conversation? Will the interviews and focus groups also be digitally recorded to ensure verbatim transcription? What will the process be for ensuring the quality of the data and final transcripts?

2 https://[www.usaid.gov/sites/default/files/documents/1864/200mbe.pdf](http://www.usaid.gov/sites/default/files/documents/1864/200mbe.pdf)

## Illustrative Table 2. Proposed data collection methods and informants to be included in each location

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Location A |  | | | | | | |
| Method | Informant | | | | | | |
|  | HO | CHWs | Leaders | Mothers of children aged 0-6 months | Mothers of children aged 7-23 months | Fathers | Grandmothers |
| KII (usually 6-8  interviews per location) | # | # | # | # | # | # | # |
| FGD  (usually 3 FGDs per informant type and age per location) | # | # | # | # | # | # | # |
| SSI (usually 8-12 per informant type per location) | #  Statement of Work | # | # | # | # | # | # |
| Total |  |  |  |  |  |  |  |
| Location B |  | | | | | | |
| Method | Informant | | | | | | |
|  | HO | CHWs | Leaders | Mothers of children aged 0-6 months | Mothers of children aged 7-23 months | Fathers | Grandmothers |
| KII | # | # | # | # | # | # | # |
| FGD | # | # | # | # | # | # | # |
| SSI | # | # | # | # | # | # | # |
| Total |  |  |  |  |  |  |  |

**Data Management, Coding and Analysis: How will the data be managed? (translation, transcription, coding, analysis, data protection3)**

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Describe the plan for how the data collected will be managed, in terms of translation and transcription: What steps will be taken to develop a final transcript that is based on the notes and the digital recordings? Will the transcripts require translation? What steps will be taken to ensure the quality of the transcripts? How will the data be de-identified and stored? How will the data be coded and who will undertake the data coding? How will the data be analyzed? Who will lead data analysis? How will staff be involved in this process?

# Preliminary Results Application Plan

* 1-2 paragraphs that reflects the initial plan for how the research results will be utilized within the design or implementation plan. It can be notional but should provide a good faith effort to show that the gender analysis will not amount to ‘a study that sits on a shelf’.

# Team Composition / Team Lead Competencies

* Description of minimum qualifications for the study team and/or team leader who will execute the work
* Description of how others across the project such as Purpose team leads will be engaged throughout the process

# Period of Performance / Timeline

* + Should detail date on which research or consultancy services (e.g. activities, deliverables) should commence and end
  + Research timeline should be appropriate for the planned scope of research with enough time for data management and analysis and preparing the final report
  + Calendar must allow for incorporation of findings into implementation ideally within the Refinement Period, e.g. prior to the submission of the PREP.

3 USAID’s open data policy FAQs: https://[www.usaid.gov/data/frequently-asked-questions](http://www.usaid.gov/data/frequently-asked-questions)

Open Data Policy Compliance Guide, p. 48 on data de-identification: https://[www.fsnnetwork.org/sites/default/files/open\_data\_policy\_compliance\_guide.pdf](http://www.fsnnetwork.org/sites/default/files/open_data_policy_compliance_guide.pdf)

Considerations for using data responsibly at USAID: https://[www.usaid.gov/sites/default/files/documents/15396/USAID-UsingDataResponsibly.pdf](http://www.usaid.gov/sites/default/files/documents/15396/USAID-UsingDataResponsibly.pdf)

# Deliverables

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A gender analysis report with a gender strategy/action plan is the expected deliverable to be submitted to BHA. The report should not exceed 50 pages, excluding annexes, and should include a 3-5 page executive summary that provides a synthesis of process, methods, and results, and how the results will be used to modify the ToC and project implementation plans (see more on this below).

In the gender analysis scope of work, please include an outline of the final report that will be submitted to BHA that follows the guidelines below:

* + Provide a methods section with adequate detail for us to ensure the veracity of the results
  + Line up the results with the activity ToC purposes and thematic areas/domains
  + State clearly the implications for changing the TOC, activity design, interventions
  + State clearly what you will do differently
  + Include a gender strategy and action plan
  + Include all required components of the final report in one document no longer than 50 pages total (excluding references and annexes)

An illustrative example of a report outline:

1. Executive summary (3-5 pages that includes a matrix of key findings and action plan of what you will do differently by thematic area/domain and ToC purpose, see illustrative example)
2. Introduction and background
3. Objectives and research questions
4. Design and Methods
5. Findings/Results by activity ToC purposes and thematic areas/domains
6. Discussion of implications of the results for changing the activity ToC or interventions planned
7. An activity-level gender strategy and action plan (it should be ***actionable*** and outline a clear and detailed plan for implementing and integrating the results of the gender analysis into the TOC, design, and implementation of activities for the remainder of the program)
8. References and Annexes

# Roles and Responsibilities of Partners

* A brief description of mutually agreed on roles and responsibilities between the implementing partner and the contractor (e.g. consultant; research group; etc.)
* Please also clarify how program staff will be engaged throughout the gender analysis process to ensure ownership and buy-in of the process and result

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## Illustrative Matrix of Results/Findings by Thematic Area/Domain by ToC Purpose

The following matrix is an illustrative example that would be helpful to include for each ToC purpose in the gender analysis report executive summary and discussion section to serve as a roadmap of how the main findings from the gender analysis will translate into actions for each ToC purpose. This will serve both BHA and the implementing partner as a road map and means to track gender integration over the life of the award.

|  |  |  |
| --- | --- | --- |
| Gender Thematic Area/  Domain | ToC Purpose 1 | |
|  | Main findings | Action Plan (what you will do differently) |
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