ACKNOWLEDGEMENTS

This document was written by Lucero Quiroga (Senior Gender Equality Consultant) and Jennifer McCleary-Sills (Bill & Melinda Gates Foundation). The definitions were based in part on research on current usage of gender equality terminology conducted by Mary Kincaid and Maneshka Eliatamby of the Iris Group. Additional technical and editorial input was provided by colleagues at the Bill & Melinda Gates Foundation: Sarah Hendriks, Sarah Henry, Kristen Envarli, Maggie Hellis, Amy Pennington, Namcy Chan, Lu Jiang, Lee Pyne-Mercier, Ellen Adams, Saara Romu, and Meredith Stilwell.
## CONTENTS

### MARKERS OF IDENTITY 5
1. Gender 5
2. Sex 5
3. Gender Identity and/or Expression 5
4. Sexual Orientation 5

### AREAS OF ANALYSIS 6
5. Gender Gap 6
6. Gender Relations 6
7. Gender Bias 6
8. Gender Discrimination 6
9. Gender Norms 7
10. Gender-Based Violence 7

### TOOLS AND APPROACHES 7
11. Gender Mainstreaming 8
12. Gender Analysis 8
13. Gender Lens 8
14. Gender Data 8
15. Intersectionality 8
16. Men and Boys’ Engagement 9

### ASPIRATIONS/GOALS 9
17. Women and Girls’ Empowerment 9
18. Gender Equity 9
19. Gender Equality 9

### ANNEX 1. OVERVIEW OF APPROACH 10
### ANNEX 2. SOURCES CITED AND CONSULTED 11
As the Bill & Melinda Gates Foundation expands its work on gender equality through mainstreaming and targeted investments for women and girls’ empowerment, the demand for tools and guidance to support Program Officers has grown. A concise set of clearly defined gender concepts is a key component of any effective gender mainstreaming toolbox. Such definitions support sector specialists who are integrating gender in their work and gender specialists who are supporting capacity building and managing investments for gender equality.

With this in mind, the Gender Equality team has developed a set of nineteen definitions to be used across the foundation. This Gender Lexicon is firmly grounded in a review of current best practices and supported by donor, NGO and academic literature. Details on the methods used to identify and streamline the included definitions can be found in Annex 1. While there are many more terms that are used across gender equality and development work, we have selected those that are most relevant for foundation staff, and most important for our common understanding.
MARKERS OF IDENTITY

1. **Gender**
   The socially and culturally constructed ideas of what it is to be male or female in a specific context.

   Gender is evident in the roles, responsibilities, attitudes and behaviors that a society expects and considers appropriate for males and females, independent of an individual’s own identity or expression. Societal and individual expectations about gender are learned, and changeable over time. They can be different within and among cultures, and often intersect with other factors such as race, class, age and sexual orientation. The accompanying pressures to perform and conform and the sanctions for not adhering to gendered expectations are also absorbed through social learning, often from a very young age. Gender is a relational concept that is best understood by examining interactions between individuals and social groups.

2. **Sex**
   The biological categorization of a person as male, female, or intersex.

   Sex is assigned at birth based on biological indicators, including hormones, sex chromosomes, internal reproductive organs, and external genitalia. Sex and gender are commonly conflated, which contributes to widespread erroneous beliefs that cultural practices, roles, and norms around gender are biologically determined and therefore cannot be changed.

3. **Gender Identity and/or Expression**
   A person’s own sense of being male, female, or another identity beyond this binary, and how they choose to appear.

   A person’s gender identity and/or expression may or may not align with the biological sex assigned at birth. When it aligns, the person is cisgender. When it does not align, the person is transgender or possibly intersex. Gender identity includes how individuals experience their own gender, as well as what they call themselves. Gender expression includes how people show their gender through clothing, appearance, behavior, speech, among other forms of expression.

4. **Sexual Orientation**
   A person’s emotional, romantic, physical and/or sexual attraction to others.

   Among other orientations, a person might identify as heterosexual, lesbian, gay, or bisexual based on whether their attraction(s) is/are to persons of a different sex and/or gender identity, the same sex and/or gender identity, or someone of more than one sex and/or gender identity. Sexual orientation is distinct from gender identity and from gender expression. However, norms about gender are closely linked to norms about sexual orientation, as are the social consequences for not adhering to them.
AREAS OF ANALYSIS

5. Gender Gap
A disparity between women and men’s and boys and girls’ condition or position in society based on gendered norms and expectations.

Gender gaps reflect the unequal distribution of opportunities, resources or outcomes, and are usually revealed through the analysis of gender data that illustrate the extent of inequalities.

6. Gender Relations
Socially constructed power relations between people based on their gender identity and/or expression.

Understanding the social relations of gender involves looking at how an individual’s access to resources, opportunities, and rights are shaped by how they are valued, their social position, and their power relative to others in society. Differences in the social value assigned to males and females create a hierarchy that typically grants more privilege and power to males over females. Men who do not conform to gender norms of masculinity through their behavior, sexual orientation, gender identity and/or expression, may also be disadvantaged or socially excluded.

7. Gender Bias
Prejudiced actions or thoughts that affect a person or a group of people based on their perceived gender.

It can lead to unequal and/or unfair treatment, such as gender-based discrimination in the workplace or gender stereotyping in the media, and unequal and/or unfair access to resources, including income, food, health care, land ownership, and education. Gender bias can be conscious or unconscious, explicit or implicit. It can occur in the public sphere, such as in schools, as well as in the private sphere, such as within households.

8. Gender Discrimination
Any distinction, exclusion or restriction made on the basis of a person’s sex and/or gender identity, rather than on a person’s skill or merit.

This type of inequality and/or unfairness in treatment can be direct, which occurs when a difference in treatment is based explicitly on gender; or indirect, which occurs when a law, policy, program or practice appears to be neutral, but has a discriminatory effect when implemented. Gender discrimination can result from individual behavior, or it can be systemic. Systemic gender discrimination describes behavior, policies or practices that are part of the structures or culture of a social institution, and which create or perpetuate disadvantages for women and girls, and those whose gender identity does not conform to the male/female binary.
9. Gender Norms*ix
The collectively held expectations and beliefs about how people should behave and interact in specific social settings and during different stages of their lives based on their sex or gender identity.

These rules seek to govern people’s behavior and represent beliefs and values about what it means to be male or female in a particular society, culture or community. The reward for adhering to these norms can be acceptance and social inclusion, while the consequences for not conforming can range from subtle social exclusion to exclusion from school, employment, or health care, and to threats or acts of violence, and in extreme cases, death. Such norms set socially-held standards for a range of decisions individuals make throughout their lifespan, including about: health seeking behaviors, age of marriage, family size, (non)use of contraception, career selection, risk behaviors, showing emotion, perpetration of violence, and household chores.

10. Gender-Based Violence*x
Violence directed at an individual based on their biological sex, gender identity, gender expression or failure to adhere to socially defined norms of masculinity and femininity.

It includes physical, sexual, and psychological abuse; threats; coercion; arbitrary deprivation of liberty; and economic deprivation, and can occur in public or private life. Some common forms of gender-based violence include: sexual coercion and abuse; neglect; domestic violence; female infanticide; child sexual abuse; sex trafficking and forced labor; elder abuse; and harmful traditional practices such as early and forced marriage, female genital mutilation/cutting and so-called “corrective rape” and “honor killings.”

TOOLS AND APPROACHES

11. Gender Mainstreaming*x
The process of integrating a gender lens into all aspects of an organization’s strategies and initiatives, and into its culture, systems and operations.

It is a strategy for making the needs and interests of all genders an integral part of the design, implementation, monitoring and evaluation of programs, policies and organizational processes, so that everyone has the opportunity to benefit equally, and inequality is not perpetuated. Gender mainstreaming requires building relevant capacity and accountability across an organization. The ultimate goal of mainstreaming is to achieve gender equality for all.

12. Gender Analysis*ix
A critical and systematic examination of differences in the constraints and opportunities available to an individual or group of individuals based on their sex and gender identity.

Gender analysis explores social relationships and gender gaps in several domains, including: gendered division of labor, access to and control over resources, and decision-making power, as well as the opportunities for advancing gender equality. This approach to analyzing a situation can establish a more complete and less biased standpoint from which to understand the context of an investment or project. A gender analysis is the first step to designing gender intentional investments, and leads to the identification of who may be included and who may be excluded from an investment or project on the basis of their sex or gender identity.
13. Gender Lens
A perspective that pays particular attention to how gender differences and relations are relevant for investments and projects.

Applying a gender lens to investments is one application of gender analysis. Using a gender lens to analyze power structures and roles within a specific context can provide important insights into whether an investment supports or exacerbates imbalances in gender-related power. Understanding a context through a gender lens can lead to better development interventions by revealing opportunities and helping to mitigate risks.

14. Gender Data
Factual information about people based on their gender.

Gender data include quantitative or qualitative data collected and presented by sex; data that reflect the diversity of people’s identities; and data that reflect issues related to gender inequality, such as unpaid care work, gender-based violence, and unequal access to and control over resources. The term ‘gender statistics’ is also used to refer to these types of data, but is limited to quantitative gender data. Gender data collection methods take into account stereotypes and social and cultural factors that may introduce error, underreporting, or bias in the data.

15. Intersectionality
A perspective that acknowledges the concrete experiences of inequality that result from the interaction of gender with other social markers of difference.

These markers include but are not limited to age, race, class, caste, religion, ability, sexual orientation, gender identity and expression, and sex characteristics. When these markers interact with gender, compounded forms of discrimination emerge that amplify people’s individual constraints and opportunities. Rather than defining men and women as homogenous groups, an intersectional approach acknowledges and works to understand the differences within and among groups of men and women and gender non-conforming individuals, and how these differences create unequal opportunities and access to resources.

16. Men and Boys’ Engagement
An approach that works with men and boys in the context of gender equality programming.

The effective inclusion of men and boys in gender equality programming can support them in transforming dominant, often non-equitable and violent, definitions of masculinity and in adopting and promoting attitudes and behaviors that are consistent with gender equality. It can also support women and girls’ empowerment. Men and boys are engaged as beneficiaries, partners, and as agents of change in their position as relatives and peers, in positions of authority, or as mentors and role models for each other.
ASPIRATIONS/GOALS

17. Women and Girls’ Empowerment
The expansion of choice and the strengthening of voice through the transformation of power relations so that women and girls have more control over their lives and futures.

Empowerment is a process of ongoing change through which women and girls expand their aspirations, strengthen their voice, and exercise more choice. Empowerment is also an outcome of women and girls having greater influence and control over their own lives and futures. Transformation of power relations occurs when women and girls exercise agency and take action, through expanded access to and control over resources and changes to the institutional structures that ultimately shape their lives and futures.

18. Gender Equity
Fairness in treatment of all people regardless of sex or gender identity and/or expression.

The concept of gender equity recognizes that individuals have different needs and power based on their sex or gender identity and/or expression, and that these differences should be identified and addressed in a manner that rectifies inequities. To ensure fairness, affirmative action is often used to remedy gaps and compensate for historical and social disadvantages that prevent individuals from otherwise operating as equals. Gender equity is a strategy that can lead to gender equality using targeted time-bound policies.

19. Gender Equality
The state of being equal in status, rights and opportunities, and of being valued equally, regardless of sex or gender identity and/or expression.

In a state of gender equality, people are free to develop their personal abilities and make choices without the limitations set by stereotypes, gender norms, or prejudices. Gender equality is widely recognized as a fundamental human rights concern and a precondition for advancing development, reducing poverty, and promoting sustainable development. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration and that achievement of development outcomes does not depend on an individual’s sex or gender identity and/or expression.

ii. Adapted from Definition of Terms: Sex, Gender, Gender Identity, Sexual Orientation, by American Psychological Association, n.d.


ANNEX 1. OVERVIEW OF APPROACH

This set of concepts was selected from over 30 terms that were researched by the Iris Group through a combination of organization websites and policy documents, as well as academic literature. Iris Group and the foundation Gender Equality team agreed on a list of sources and a list of terms, as a starting point for the review.

Organizations and Search Engines Consulted:

<table>
<thead>
<tr>
<th>Multilaterals</th>
<th>Bilaterals</th>
<th>Foundations</th>
<th>INGOs</th>
<th>Search Engines</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNDP</td>
<td>DFAT (Australia)</td>
<td>Carnegie</td>
<td>CARE</td>
<td>Google Scholar</td>
</tr>
<tr>
<td>UNESCO</td>
<td>DFID (UK)</td>
<td>Clinton</td>
<td>EngenderHealth</td>
<td>Gender Watch</td>
</tr>
<tr>
<td>UNFPA</td>
<td>GAC/CIDA (Canada)</td>
<td>Ford</td>
<td>European Institute for Gender Equality</td>
<td>JSTOR</td>
</tr>
<tr>
<td>UNICEF</td>
<td>SIIDA (Sweden)</td>
<td>Gap</td>
<td>ICRC</td>
<td>Project Muse</td>
</tr>
<tr>
<td>UNWOMEN</td>
<td>USG (USAID/IGWG/Feed the Future/PEPFAR)</td>
<td>Hewlett</td>
<td>IFRC-Red Cross</td>
<td>ProQuest Advanced</td>
</tr>
<tr>
<td>WHO</td>
<td></td>
<td>Nike</td>
<td>MenCare</td>
<td>PubMed</td>
</tr>
<tr>
<td>PAHO</td>
<td></td>
<td>Packard</td>
<td>MenEngage</td>
<td>Women and Social Movements in the US</td>
</tr>
<tr>
<td>World Bank</td>
<td></td>
<td></td>
<td>Mercy Corps</td>
<td>Women’s Studies International</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Plan International</td>
<td>World Bank e-library</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Promundo</td>
<td>World Development Indicators</td>
</tr>
</tbody>
</table>

For those concepts with multiple widely used definitions, or for terms in similar categories, each term’s definition was explored and the language used here was recommended based on the differences between terms and the way in which they are used within the international donor community, as well as the foundation’s priorities. The different elements of each definition for a particular term were analyzed to determine strong/positive and weak/negative elements of the definition, how the elements of the definition fit with the foundation’s priorities and culture, and to make recommendations for each term. At the end of the textual analysis, the Iris Group prepared recommendations for terms to include and those not to include, as well as a summary of preferred/recommended elements of each of the definitions that had variations in how they were defined.

Taking these recommendations into account, the Gender Equality team crafted each definition ensuring that each one: is accessible across sectors; starts with a central idea, followed by illustrative language; is global in scope – as opposed to reflecting US usage only; and references all sources that have informed it. The rich process that resulted in these definitions included extensive consultations with all members of the Gender Equality team. Different versions of the definitions were tested during the gender equality capacity building workshops with the WSH and FSP teams. Finally, members of Out for Good provided invaluable feedback to make the Lexicon reflect a more inclusive understanding of key terms.
ANNEX 2. SOURCES CITED AND CONSULTED


British Columbia Centre of Excellence for Women’s Health Gender Equity through Health Promotion. (n.d.) Resources for Promoting Health in Women. Retrieved from: http://promotinghealthinwomen.ca


Ceci, S. J., & Williams, W.M. (2015). Women have substantial advantage in STEM faculty hiring, except when competing against more-accomplished men. Frontiers in Psychology. 6(1532).


Federation of Red Cross Societies/American Red Cross. [n.d.] Training materials (internal).


UNESCO. (2006). Gender in Education Network in Asia: A Toolkit for Promoting Gender Equality in Education. UNESCO.


