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**OPTIONS FOR FUTURE WORK ON GENDER EQUALITY BY THE DAC WORKING PARTY ON
AID EVALUATION: A DISCUSSION PAPER**

(Note by the Secretariat)

The attached document is submitted for discussion at the 35th meeting of the Working Party on Aid Evaluation on 14-15 November 2001.

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OPTIONS FOR FUTURE WORK ON GENDER EQUALITY BY THE DAC WORKING PARTY ON AID EVALUATION: A DISCUSSION PAPER

Purpose of discussion note

1. This discussion note outlines three possible and not mutually exclusive options for future work on using evaluation tools and processes more effectively to enhance donor activities in relation to gender equality and women's empowerment. This work will also address further integrating gender analysis into evaluation work in other areas. It should be seen as part of a long-term and coherent approach to gender issues within the Working Party (see historical background). The note draws on earlier reflections, notably by Australia and on conclusions and identified areas for improvement from the 1999 evaluation and gender workshop hosted by Sweden.
2. The first option outlines a proposal to help gender and evaluation experts identify some possible solutions to recurrent institutional obstacles in relation to gender mainstreaming.
3. The second option outlines innovative and useful existing tools and processes that have improved the "gender" dimensions of recent evaluations. This work will assist evaluation managers improve evaluation processes within their own institutions, from a gender perspective.
4. The third option, based on a synthesis study of results, would help identify positive examples of how including a "gendered" approach in development activities has improved the outcome of an activity's primary objective (*e.g.* educational achievement). This would entail those evaluations that sought gender-related information, whether or not gender equality was an explicit secondary or primary objective.
5. These suggestions are for consideration by the Working Party on Aid Evaluation who would carry out the work in consultation and in co-ordination with the Working Party on Gender Equality (or a representative group).
6. Work could be carried forward by a Steering Group which would be responsible for monitoring the implementation of the options selected by the WP-EV.

Historical background

7. DAC work evaluating or reviewing gender integration, and evaluation methodologies is on-going, and includes:
 - 1991-1994: Assessment of DAC Members' Women in Development Policies and Programmes (1994), an overview of three themes: Integration of Gender Concerns in the Work of the DAC; Assessment of Policies and Organisational Measures in WID Approaches Adopted by DAC Members; WID as a Cross-Cutting Issue in Development Aid Evaluation [WP-EV].

- 1999: DAC WP-EV Workshop on Evaluating Gender Equality and Women's Empowerment (November 1999, Stockholm) (WP-EV + participation WP-GEN)¹.
- 2000: Review of Progress on the DAC Gender Equality Goals "Progress towards gender equality in the perspective of Beijing + 5" [WP-GEN].
- On-going: Tipsheets on gender and various sectors as tools for programming and monitoring [WP-GEN].
- 2001: Preliminary ideas and approaches by AusAID on possible future options.

Options for future work

1. Reviewing institutional approaches among donors for integrating gender equality and women's empowerment in development co-operation activities and management systems

Rationale

6. Work to date points especially strongly to the need to improve the way gender equality is introduced into development activities upstream. In addition, efforts to "gender mainstream" have sometimes been confronted with recurrent obstacles shared across agencies (see *Progress Towards Gender Equality in the Perspective of Beijing +5* [DAC, 2000]). Identifying what institutional obstacles are recurrent, and whether any responses have been successful at each stage of the integration process, may suggest new or modified approaches to how donors attempt to "mainstream" gender equality in their institutions and their activities.

Objective

7. Based on existing material, including lessons learned from Members in their recent evaluation of gender equality policies, the WP-EV would draw lessons from a variety of approaches to institutional "gender" arrangements (and use of gender analysis), in order to draw out identified ways to "bypass" recurrent institutional obstacles at each level, from policy to implementation (downstream), as well as from initial design to monitoring and evaluation approaches (upstream). This option could differentiate between the various levels of institutional obstacles.

8. This comparison would cover a selection of approaches in multilateral and bilateral agencies. It could build in part on (a) the findings of a related study currently being carried out by DFID and any other Members; (b) the Churchill Fellowship study by Juliet Hunt "Institutionalising gender equality commitments in development organisations and programs" which reviews approaches in Australia, UK, US, the Netherlands; (c) the Oxfam paper by Anne Coles "Men, women and organisational culture: perspectives from donors" (2000).

1. Seven main recommendations were made in the 1999 Workshop report: three relating to methodology, two on feedback, one on joint evaluations, and one on increasing visibility. In the specific recommendation relating to methods, the workshop encouraged the DAC to better apply or revise existing methods; and suggested that other cross-cutting goals also required attention, such as women's empowerment and policy dialogue. Workshop members highlighted the issue/challenge of communication and feedback and recommended to further present, package, and market lessons and practices.

Steps envisaged:

- Discussion in the WP-EV including suggested elements for the terms of reference. This could draw on current work, e.g. in Australia, Sweden, United Kingdom, the World Bank and other interested Members (2001). It would be helpful if one member of the WP-EV led the discussion.
- Elaboration of the terms of reference, suggestions for consultant-experts from Members, launch of work. The study may expand on the current DFID and other related work (2002).
- Discussion on first draft of findings and recommendations in the WP-EV (2002).
- Workshop with gender and evaluation experts, peer review colleagues, senior management, human resources staff from agencies to discuss findings/conclusions of second draft, and sketch out what can work in establishing real institutional change towards “engendered” activities and policies (short policy note or communiqué) (2003).
- Forward results to a DAC meeting to discuss institutional change mechanisms (2003).

Expected Outputs and Results

The expected result of this option is to draw out effective institutional mechanisms for engendering policies and their implementation in activities. The output will be a study that could be the basis for a discussion in the WP-GEN, the WP-EV and the DAC, on effective institutional mechanisms.

2. *Improving the gender dimension in evaluation methodologies and processes*

Rationale

9. Work to date has demonstrated that evaluation methodologies and processes could incorporate gender aspects more systematically. During an evaluation, it may be possible to include gender criteria, and use gender analysis to determine positive or negative outcomes for men as compared with women, or girls as compared with boys. This can be possible whether the activity has gender equality as a primary or a secondary objective or does not have it as a stated objective. The latter case would require innovative approaches and tools since gender related benchmarks and indicators are unlikely to be built into monitoring processes. It appears that some agencies are currently exploring innovative and useful ways to gather information, using different tool kits and frameworks. Understanding what practical and innovative approaches and tools produce more gender sensitive evaluations and assessments would improve feedback and learning mechanisms. This would also be a follow through on recommendations from the 1999 evaluation and gender workshop in Sweden.

Objective

10. Identify which existing innovative and useful tools and processes have contributed to integrating “gender” dimensions of recent evaluations. This work will assist evaluation experts improve evaluation processes within their own institutions, from a gender perspective. This work would help provide guidance

for members on terms of reference, and information and analysis requirements, as well as evaluation criteria, performance information and ideas on participatory methods.

Steps envisaged

- Review a selection of recent evaluations that have included use of gender analysis or similar approaches in order to try to determine what practical approaches and tools were used, with success (2001).
- Identify key tools and approaches in use (2001).
- Draft brief note on recommended innovative approaches/tools, for discussion by agency staff, including from sectoral and cross-cutting policy areas, evaluation and gender experts (2002).
- Refine note, integrating results of discussions in each agency (2003).

Expected Outputs and Results

This work will provide useful tools and processes for evaluation managers, in addressing gender dimensions in their work. The concrete output could be a comprehensive ‘toolbox’ building on some of the existing tipsheets produced by the WP-GEN.

3. *Assessing whether engendering development activities improves the achievement of overall results*

Rationale

11. Development activities that include gender equality and women’s empowerment as a secondary objective would ordinarily include gender related benchmarks and indicators. These can help demonstrate whether including a gender perspective can improve development outcomes. At the same time monitoring processes, and mid-term evaluations sometimes reveal unforeseen implementation difficulties that may prevent the achievement of stated objectives, and the use of gender analysis can help identify unforeseen obstacles and possible de-blocking solutions. This may be true even for those activities with no stated gender objective. Assessing how including gender analysis impacts on development outcomes, may provide evaluation evidence that gender analysis should be included in early stages, upstream, in design, implementation and monitoring of any development activity.

Objective

12. The objective is to test if and how the inclusion of gender considerations upstream can improve the achievement of the main objectives of the activity and improve its outcomes. This should help identify the lessons that can be extracted for improving approaches to programme design and implementation, upstream.

Steps envisaged

- Review current evaluations that have examined impact and results from a gender perspective, in order to try to determine how original objectives have been achieved or improved through the inclusion of gender, whether it was a primary, secondary or not a stated objective. These evaluations would include major exercises recently completed or currently underway in the World Bank, the UNDP, DFID and others (2002).
- Workshop based on a draft paper for discussion with agency staff, including from sectoral and cross-cutting policy areas, evaluation and gender experts (2002).
- Synthesise the results of this work for the DAC (2003).

Expected Outputs and Results

A study identifying examples of how including a gendered approach has had impacts on the achievement of overall objectives of development initiatives. This study will contribute to increasing understanding of the implications of specific gendered approaches.