

Evaluating Gender Equality - Policy and Practice

**An assessment of Sida's evaluations
in 1997-1998**

Lennart Peck

**Department for Evaluation
and Internal Audit**

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Executive Summary

This report deals with how gender equality is - and should be - addressed in Sida evaluations. It has been carried out by Boman & Peck Konsult AB together with a reference group comprising representatives of Sida and Stockholm University. Its purpose is, on the one hand, to provide background information for a DAC review on how gender equality is treated in evaluations by reviewing a number of Sida evaluation reports, and on the other hand, to identify good approaches to gender equality and women's empowerment in evaluations.

The first part, Evaluating Gender Equality, is a theoretical discussion of why, when and how gender equality should be addressed in evaluations. Its purpose is to provide a framework for the review of evaluation reports as well as contributing to the general discussion in this field. It notes that gender equality is an overall objective of Swedish development co-operation and should be treated as such also in evaluations. The target group analysis provides a natural starting point. The interventions (projects, programmes etc.) may then be assessed by Sida's regular evaluation criteria *viz*:

- relevance (*to national and Swedish gender equality objectives and local gender context*)
- fulfilment of (*gender-equality*) objectives,
- effects (*on gender equality*),
- cost-effectiveness (*in the achievement of gender-equality effects*),
- sustainability (*of the effects on gender equality*).

Even though there is a gender dimension in any intervention, the relative importance of analysing gender equality will vary depending, for example, on the objective of the intervention, its potential impact on gender equality and the particular purpose of the evaluation.

Evaluability, i.e. the extent to which assessments are possible, varies between different interventions. In practice, it also depends on the resources (time) allocated.

How to deal with gender equality in evaluations can be seen as part of the broader issue of how to integrate the various other cross-cutting issues of Sida. The questions and problems arising in connection with the evaluation of gender equality are otherwise rather similar to those of evaluation work in general.

The second part, Review of Sida Evaluations, deals with how gender equality is included in Sida's evaluations at present. This is done primarily to answer the DAC questionnaire but ought to be of interest for Sida as well. It concludes that 65% of the reports reviewed mentioned gender, a slight increase on the figure noted in 1992 (61%). However, the main problem is the quality of analyses. Usually gender equality is discussed quite briefly, as a side effect or as a separate matter altogether. The discussion often lacks the natural linkage to the of target group analysis. The relevance of the interventions to the local gender context is hardly ever analysed. To the extent that gender is discussed, it is usually with respect to implementation processes, not objectives and results. Most reports talk about women and how they may have benefited from the

intervention. Hardly any reports introduce an equality perspective and discuss how women's situation vis-à-vis that of men may have changed as a result of the intervention. There is often a lack of data and an inconsistency between findings, conclusions and recommendations.

Likely factors behind the, generally speaking, low quality of the assessments include lack of clear objectives and indicators for gender equality in the interventions, as well as a lack of base-line and monitoring information. 62% of the ToR mentioned gender, which is more than the 50% seen in 1992. However, ToR were often vague, giving little guidance as to what the analysis should include. The time allocated for many evaluations does not seem sufficient for analysing gender equality satisfactorily. Competence in this area still appears to be limited, as well as access to guidance for those who need it. The confusion regarding terminology on gender and gender equality is an additional problem.

In some cases, there are good reasons for supposing that the actual impact on gender equality has been marginal. In other cases, the actual evaluability has been low, as impact on gender equality has been indirect and difficult to isolate from external factors. This, then, may explain why no analysis has been made.

It has not been possible to determine how findings, conclusions and recommendations on gender in evaluation reports are being used. However, there are indications that the actual demand for information on gender is limited.

A number of suggestions for the improvement of evaluations are presented, considering the interventions as such, evaluation preparation, the evaluation process, the evaluation report as well as the use of the evaluations. Furthermore, Sida is *recommended*:

- to initiate an internal discussion of the uses and need of information on gender equality;
- to arrange training opportunities, for the staff and consultants concerned, on evaluation of gender equality, either as separate events or as a component of Sida's gender courses;
- to highlight gender equality in its evaluation policy and evaluation manual;
- to continue to monitor, and learn from, the way in which gender equality is addressed in its evaluations;
- to promote the development of impact indicators, and practical methods for assessing gender equality;
- to promote the use of a common vocabulary, stressing that the focus should be on the gender equality objective;
- to co-ordinate efforts to address the different cross-cutting issues, including gender equality, in evaluations;
- to allocate sufficient resources and time for proper evaluation of gender equality or to adjust its ambitions in this respect;
- to continue its efforts to raise the standards of evaluations in general, so as also to obtain better analyses of gender equality.

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1 Introduction

This report deals with how gender equality is - and should be - addressed in Sida evaluations. There are two sides to this. First, there is Sida's policy of "mainstreaming", which implies that gender equality should be integrated in policy formulation, decision-making and operations. As evaluations provide vital information for this, they are crucial for the enhancement of the gender equality objective. Second, giving attention to gender equality will lead to better evaluations. Not only is gender equality a development objective to be evaluated as any other. Without recognition of the fact that men and women may face different problems and frequently are affected by donor interventions¹ differently an important dimension will be missing in the assessments. Ultimately it is a question of the quality of evaluations.

1.1 Background

The question of to what extent, and in what ways, gender is addressed in evaluations has received the attention of the Development Assistance Committee of the OECD countries (DAC). A review on the issue was carried out in 1993/94. The DAC Working Party on Aid Evaluation has now decided to carry out a follow-up review to see to which extent the observations of the 1993/1994 review have been taken into consideration and its recommendations have been followed. The follow-up is based on a questionnaire to members of the Working Party, including Sweden.

That gender equality should be properly reflected in evaluations is a concern shared by Sida. There are policy papers from the former SIDA, dating back to 1985², which state that SIDA evaluations should consider the effect of development assistance on women's and men's situation. The 1994 Evaluation Manual for Sida has a section and a special annex on "Methods for Integration of Gender Aspects in Evaluations".³ Sida's Action Programme for promoting equality between women and men⁴ states that "evaluations are a very important means of ensuring adequate assessment of process and results". It also notes that there is a "need for specific inputs to develop methodology and competence" in this field.⁵

The ambition is of course to obtain "better" evaluations with regard to gender and gender equality, and to identify practices to this end. However, as stated in a DAC publication: "A factor that has made the identification of such examples ("best practices") difficult is the absence of clear goals or criteria for success in this area either

¹ "Intervention" will be used to indicate any project, programme or similar subject of evaluation.

² Verkschefsbeslut nr 287/85, 1985-08-16. Sida Utredningsbyrån Kvinnoenheten, SIDA's Riktlinjer för ett Kvinnoinriktat Bistånd, p. 3.

³ Elisabeth Lewin, Published by the Evaluation Unit, Planning Secretariat, SIDA, Evaluation Manual for Sida, 1994. The perspective in this document is not explicitly gender equality but that "Swedish supported projects shall benefit both men and women" (p. 47). Nonetheless, it gives valuable guidance for the evaluation of gender equality as well.

⁴ Sida Department for Policy and Legal Services, Sida's Action Programme for Promoting Equality between Women and Men in Partner Countries, henceforth referred to as "the Action Programme". It is divided into three parts: Experience analysis, Policy and Action Plan.

⁵ The Action Programme, Action Plan, pp. 13-15.

at the agency or project level.”⁶ In other words, it is not quite clear how this “better” should be interpreted. Hence, apart from describing how gender *is* addressed in evaluations, there is an urgent need for a normative discussion of how it *should be* addressed. Only then will it be possible to identify suitable *methods* and *strategies* to arrive there.

1.2 Previous research and findings

As an input to the DAC review of 1993/94, SIDA commissioned a special study: WID as a crosscutting issue in development aid evaluations, by Krister Eduards and Eva Svedling, 1992. That report studied 51 Sida evaluations and gave information, on e.g. how often gender had been addressed in the evaluations and in the terms of reference (ToR), on gender composition of the teams and differences between different sectors. It also contained information on progress made in terms of Women in Development (WID) as stated in the evaluations. It was a purely descriptive study, without any final conclusions or recommendations.

Another study was carried out in 1997: Poverty Reduction and Gender Equality: An Assessment of Sida’s Country Reports and Evaluations in 1995-1996 by Eva Tobisson and Stefan de Vylder. As its title suggests, this report looked at both poverty reduction and gender equality in both evaluations and country reports, the attention paid to this and the depth and quality of analysis. It concluded that scant attention was usually paid to gender (and poverty) issues and that the analysis, with few exceptions, was superficial. Weaknesses in terms of how gender was addressed in ToR were also noted, as well as the lack of guidance to the evaluators and of established methodologies for measuring impact on gender equality. The report compared the emphasis given to gender in the ToR and in the evaluation report with their own assessment of its relevance and noted considerable differences.

Both the above mentioned reviews focused primarily on the evaluation *reports*, though also with some discussion of the ToR and team composition. Less attention was given to the actual *chain* of activities on which successful evaluation depends, including establishment of project indicators, monitoring, planning of the evaluation and, perhaps most important, the way in which evaluations are used. Such a perspective would appear important in order to identify concrete measures for improvement.

Noting that gender is in fact mentioned in most evaluation reports, though the analysis is weak, a question that could be further explored is also exactly *how* gender equality is addressed and in *what ways* it needs to be improved.

⁶ DAC Sourcebook on Concepts and Approaches linked to Gender Equality, 1998, p. 37.

1.3 Purpose of the assignment

According to the ToR, attached as Annex 1, the purpose of this assignment is twofold:

- (i) The study should provide background information and answers to questions 16 and 17 in the DAC questionnaire concerning gender equality and women's empowerment in evaluations by reviewing a number of Sida evaluations.⁷
- (ii) The study should try to identify good approaches to gender equality and women's empowerment in evaluations.

While the first will serve as an input to the DAC review, the second can primarily be seen as a support to Sida in its efforts to develop tools and methods for evaluating gender equality. At a later stage the material could be used to arrange seminars on the topic or to produce some form of guidelines for how to incorporate gender in evaluations. It may also be an input to the up-coming DAC seminar on gender equality and evaluations.

1.4 Implementation of the assignment

The assignment was carried out by Boman & Peck Konsult AB during the autumn of 1998. The consultant worked in close collaboration with a reference group consisting of representatives of Sida's Department for Evaluation and Internal Audit, its Policy Secretariat and the Development Studies Unit, Department of Social Anthropology, Stockholm University.⁸ This provided an opportunity for discussing the ToR and focus of the assignment as well as particular issues related to evaluation work and gender equality.

Answers to the DAC review were presented in draft form on November 2. A draft report was presented to Sida in November and discussed at a meeting of the reference group. The comments received from the reference group have been considered in the compilation of this final report.

1.5 Structure of the report

The report consists of two main parts, followed by a chapter containing conclusions and recommendations to Sida.

The first part, Evaluating Gender Equality, is a theoretical discussion about why, when and how gender equality should be addressed in evaluations. Its purpose is to provide a framework for the review of evaluation reports as well as contributing to the general discussion in this field. As its point of departure this chapter takes the Sida Action Programme for Gender Equality, discusses implications of this programme for evaluation work and suggests a number of ways in which gender equality can be addressed in

⁷ Questions 16 and 17 are those dealing explicitly with the gender dimension in evaluations. The other questions will be answered directly by Sida.

⁸ Ann-Marie Fallenius, Eva Lövgren, Susanne Wadstein and Prudence Woodford-Berger.

evaluations. The intention is to highlight and structure some key issues and questions, not necessarily to answer them all.

The second part, Review of Sida Evaluations, deals with how gender equality is included in Sida's evaluations at present. This is done primarily to answer the DAC questionnaire but ought to be of interest to Sida as well. The review is also used to provide examples to the theoretical discussion.

1.6 Sources and data analysis

The theoretical discussion has been based on the literature listed in Annex 2 and discussions with the reference group and Sida's gender adviser. As mentioned above, the review of evaluation reports (see below) has been an important input and source of inspiration.

The review has been based on 42 reports in Sida's evaluation series, listed in Annex 3. Sida's own Evaluation Data Worksheets have been used to gather basic information about the evaluations, e.g. cost and number of consultancy weeks etc. Time has not permitted an analysis of other project documentation.

In co-operation with Sida, it was decided to include all evaluation reports written after April 1997 to date. The reasons for this selection were as follows:

- The reports selected cover different sectors and types of support etc. as requested in the DAC questionnaire.
- To determine changes since the last DAC study, the selection of latest reports gives the most updated picture.
- Sida has already assessed how gender equality was considered in the evaluations of 1995 and 1996.
- All the reports selected were written after equality between women and men was made an overall objective of Swedish Development Co-operation in May 1996. Many of the reports were written after the introduction of the Action Programme.
- Studying the total population instead of a sample of evaluations means that firm conclusions can be drawn regarding this time period.

Although the DAC questionnaire suggests that the evaluations between 1995 and 1997 should be studied, it is not believed that the inclusion of some evaluations from 1998 will harm the international study. Direct comparisons between different countries will not be possible in any case, since the development agencies use different methodologies for their respective reviews and present findings in different formats.

In co-operation with the reference group for this assignment, a format was elaborated for analysing the evaluation reports (See Annex 4). This format took the questions posed in the DAC questionnaire as its starting point but was not confined to them.

When analysing the reports, a certain element of subjectivity is almost unavoidable. However, given the purpose of the study, capturing the general tendencies and the broad variations in terms of how gender is included in the evaluations is perhaps more important than exactness. A somewhat lower reliability should in this perspective be tolerable.

As the review covers all the evaluations for the period analysed, findings are valid for this period. They do not serve to draw conclusions beyond this time period. However, the various reports show e.g. what *can* be done and problems which *may* exist, and can thus serve to formulate different hypotheses.

The ways in which particular issues and questions have been analysed are commented on in relevant sections of the text.

2 Evaluating gender equality

2.1 Terminology and definitions

Women, gender, women in development (WID), gender & development (GAD), empowerment of women and gender equality; these are just a few of the terms and concepts that have been used over the last years. The changing terminology reflects the progress that has taken place, but it has also created considerable confusion.

According to most literature, “*men*” and “*women*” refer to biological differences (sex) while the term “*gender*” refers to the economic, social, political and cultural attributes and opportunities associated with being male and female. *Empowerment of women* concerns women gaining increased power and control over their lives and dependants. It involves awareness-raising, building self confidence, expansion of choices, and increased access to and control over resources. “*Gender equality*” implies “equal enjoyment by women and men of socially-valued goods, opportunities resources and rewards.”⁹ It is a question of men and women having the same rights, opportunities and duties, in all essential fields of life; work, home and family and participation in public life. It considers women’s situation *relative* to that of men, and vice versa.

Now, even if the term gender equality is clear it itself, it may be used in different ways. It is sometimes referred to as an issue, a perspective or a dimension, sometimes as an objective or as a criteria for evaluation. This calls for some comment.

Simply speaking, an “issue” may be said to be something which deserves particular attention. An evaluation will discuss various issues of which gender equality may be one. It may even be the main issue, perhaps a thematic evaluation on gender equality. However, the term “issue” is vague; it may refer to the gender-equality situation in a particular setting, the way gender equality has been considered in the planning process or the extent to which the intervention has contributed to increased gender equality.

Choosing a *perspective* is a question of what to look at and how to deal with information analytically. Any intervention can be viewed, e.g., from a social, macroeconomic, ethnic or gender perspective, highlighting different *aspects* or *dimensions* of the intervention itself.¹⁰ Applying a gender-role or gender-equality perspective means analysing the situation of men and women, how they have participated in, and been affected by an intervention. This will provide information on gender equality, which is a necessary first step before any evaluation can be made.

Evaluation, i.e. determining the value or merits of an intervention, requires some kind of criteria, e.g. relevance and cost-effectiveness, which reflect some generally desired qualities. Gender equality is sometimes listed among the other *evaluation criteria* in

⁹ DAC Guidelines for Gender Equality and Women’s Empowerment in Development Co-operation, 1998, pp. 12-13.

¹⁰ E.g. evaluation on Swedish Support to Tanzania’s power sector looks at technical, economic, gender and managerial aspects.

ToR. This is no different than if the intervention were to be assessed with regard to, e.g., poverty reduction, diversity, or human rights.

Gender equality is now an overall *objective* of Swedish development assistance, and as such no different from, say, economic growth or democracy objectives. It then refers to something that the intervention itself should contribute to and, hence, against which it can be evaluated.

The 1993/94 DAC review concerned “WID”. The present follow-up concerns “gender equality and women’s empowerment”. This report, as its title indicates, focuses on how *gender equality* is dealt with in evaluations. The reason for this is that gender equality is an explicit objective of Swedish development co-operation. We shall therefore mostly refer to “evaluation of gender equality”. Gender issues can of course be addressed in evaluations without an equality perspective. We will then simply talk about “gender”.

2.2 Sida Policies and some implications

Gender equality has always been one of the aims of Swedish development co-operation. However, the vocabulary, strategies and emphasis have changed over the years. Sida’s current position is reflected in its 1997 Action Programme. Three cornerstones are:

- Recognition of gender equality as a *societal* issue where focus must be placed on men and women and the relationships between them;
- The parliamentary resolution making equality between men and women in partner countries an official *objective* of Swedish development co-operation as from May 1996¹¹;
- The strategy of “*mainstreaming*”, i.e. “the recognition of the need to influence all methodologies, analysis, policies and planning from a gender perspective”.¹²

What are the implications of this from an *evaluation* perspective?

There are historical reasons for the focus on women. Women have often been underprivileged, and still are, in many of the Sida partner countries. Assistance to women has in this sense also been a support to equality. However, as stated in the Policy document, in order to understand and tackle the structural causes of gender inequality rather than the symptoms, both men and women and the *relations* between them must be considered. Such a perspective must be adopted also in evaluations.

That gender equality has become an overall *objective* indicates that it is a future desired state for the guidance of efforts and activities. It implies an ambition actually to change the existing gender patterns in partner countries towards a higher degree of equality. It is not a new objective, but the 1996 parliamentary resolution has given it a different and higher status. That gender equality is one of the six overall objectives of Swedish

¹¹ For co-operation with Eastern and Central Europe, promotion of equality between women and men has not been established as a specific goal but equality should be taken into consideration in relation to other goals. Policy, p. 2.

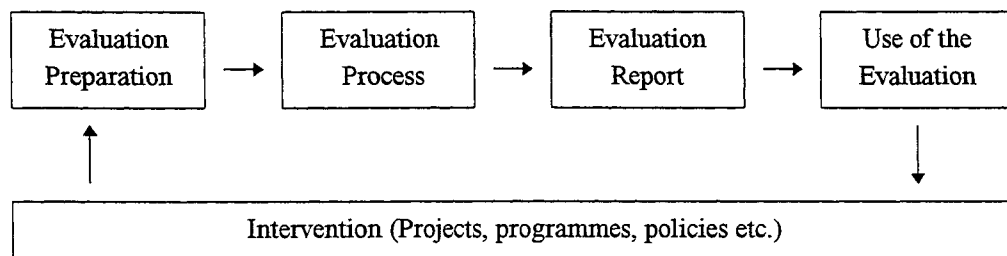
¹² Sida, Department for Policy and Legal Services, *Mainstreaming: A Strategy for Achieving Equality between Women & Men - A think piece*, 1996, p. 1.

development co-operation does not mean that it immediately becomes an objective of each intervention. The so called DAC marker for classification of projects used by Sida distinguishes between projects where gender equality is a primary, secondary or no objective. However, as will be discussed later, it means that the relevance of any project can be assessed with regard to this overall objective. Also, as interventions should never be contrary to the overall objectives, there will always be reason to look at side effects on gender equality.

Going on to the mainstreaming strategy, the Action Programme states that an important objective of the Action Plan is to incorporate the promotion of equality between women and men as an integral part of all work.¹³ Hence, gender equality should be integrated in evaluation work also. As policy and decision-making should consider gender equality, there ought to be an increased demand for information and analyses on gender equality. Also, an increasing number of interventions should have gender equality as an objective, i.e. there will, more often than at present, be an explicit gender-equality objective to assess. However, as the main strategy is to integrate gender equality in the various Sida programmes, it is likely to be, not a primary objective but rather a secondary objective or one of several, and this has implications from an evaluation point of view.

2.3 The evaluation and evaluation report

An evaluation is “a systematic and thorough assessment of the organisation, implementation and results of a project.”¹⁴ The tangible output is the evaluation report. However, it can also be seen as a chain of different activities as shown below:



We shall here use the word “*evaluation*” to indicate the complete evaluation exercise, as opposed to the “*evaluation report*” referring to the actual document.

An evaluation is never an end in itself; it is carried out for a purpose. Literature, including Sida documentation, differs somewhat on what evaluations are actually for. According to the document Sida at Work, evaluations may be used “on the one hand for the further organisation of the project in cases where the Swedish support is continued, and on the other, to provide experience and lessons for future co-operation.”¹⁵ Sida’s evaluation policy mentions three objectives, namely control (accountability), learning and

¹³ It further states: “The mainstreaming approach implies that attention to equality between women and men should pervade all development interventions. This requires that the attention to equality is included from the earliest stage before important decisions on goals, strategies and budgets have been taken.” Action Plan, p. 8.

¹⁴Sida, Sida at work, p. 89.

¹⁵ Sida, Sida at Work, 1998, p. 89.

development of knowledge. Hence, the evaluation *report* should include findings, conclusions and recommendations for one or several of these purposes.

The evaluation report requires a number of different activities to be carried out, including choice or elaboration of methodology, collection and analysis of data, report writing and dialogue. This is here referred to as the evaluation *process*. The value of dialogue taking place during the course of an evaluation should not be underestimated. Depending on how the evaluation is carried out, this process may in itself also constitute a form of output.

Preparation of the evaluation includes, but is not necessarily limited to:

- definition of objectives (reflecting how the evaluation should be used);
- identification of stakeholders of the evaluation;
- definition of scope and limitations;
- choice of evaluation criteria;
- allocation of resources in terms of competence and time;
- preparation of ToR;
- giving instructions to evaluators.

When defining the above, account must be had of information needs, the availability of resources (funds and consultancy time), and of course, the object of evaluation, the *intervention*. Needless to say, there is a great variation between different objects of evaluation. The object may be of one or several projects, a country programme or a particular form of co-operation. Has gender equality been an objective and if so, primary, secondary or one of several? Has the intervention had a potential to impact on gender equality? If so, in what ways and to what extent? How complex is the socio-cultural context? Has a gender analysis ever been carried out and are monitoring data available? What dialogue on gender has there been within the interventions so far? These, among other things, determine what is *important* and *possible* to study as well as the best *ways* of doing so.

What then is a “good” evaluation? One answer is to regard the evaluation like any other intervention with certain objectives, resource requirements, activities and output which hopefully will have an impact. A good evaluation is then one that has the desired impact, i.e. fulfils its objectives. Similarly, one may also argue that evaluations should be cost-effective, be relevant to overall objectives (including gender equality) and have a lasting impact.

Looking at the evaluation *report*, its usefulness for its particular purpose will be the main criteria against which it will be assessed. It should contain information which is meaningful in its particular context.¹⁶

2.4 Why is gender equality addressed in evaluations?

¹⁶ For a more extensive discussion of criteria for the assessment of evaluation reports, see Carlsson et al. Using the Evaluation Tool, A survey of conventional wisdom and common practice at Sida, 1997. This report talks about utility standards, accuracy standards feasibility standards and propriety standards.

The answer follows from the discussion above. There is *no separate* purpose of addressing gender equality in evaluations; it is addressed for the same reason as any other objective of Swedish development co-operation. Consequently the assessments of gender equality should serve for accountability, learning and knowledge purposes; for Sida, the recipient country, consultants, or whoever is the receiver of the evaluation. In terms of control and accountability, Sida must assure that the gender-equality objective is properly reflected and fulfilled at all levels of its programmes as well as report on this to the Swedish government and public. As a tool for learning, the evaluations should be used as an instrument for improving development assistance with respect to gender equality. Decisions on projects, programmes, policies and strategies should consider the findings, conclusions and recommendations on gender equality of evaluations. Knowledge and “lessons learned” on gender equality are needed to improve programmes and avoid mistakes in the longer perspective.

2.5 Target groups and stakeholders

Gender equality is ultimately a question of people; what problems are men and women facing, who will benefit from the intervention and who participates in the process? An assessment of gender equality thus starts with an identification and analysis of target groups, i.e. the specific group or groups for whose benefit the project is undertaken, with respect to gender roles, influence and access to resources, problems faced by men and women respectively.

There may be target groups at different levels - primary, secondary and tertiary - with different characteristics with regard to gender. A project for the benefit of women (e.g. domestic violence) may very well be directed to men.

Stakeholders, i.e. persons, groups or institutions with interest in or influence on the intervention, is a wider concept. The sex of stakeholders, e.g. government decision-makers, may explain certain results and is therefore also of interest.

2.6 Gender equality and Sida’s evaluation criteria

The extent to which an intervention has contributed to the gender equality objective can be assessed with Sida’s regular evaluation criteria. Using the regular criteria is also a way of integrating the assessment of gender equality in the report. Given below are some of the issues that could be raised in connection with each evaluation criteria to address gender equality.¹⁷

Relevance

Relevance can be assessed at various levels. First, any intervention can be assessed with respect to how it contributes to the overall *Swedish development objectives*, including

¹⁷ Sida’s Action programme (Action Plan, p. 13) calls for a follow-up at three levels (i) intentions; what was planned (ii) actions; what was actually done, and (iii) impact; what effects were “on the ground”. There is no contradiction between this and what is stated here.

gender equality. Consideration must of course be taken to the Sida policy and objectives at the time of the period evaluated.

Secondly, according to Sida's Action Programme, efforts to promote gender equality should be guided by the priorities and initiatives identified by national governments. Hence, the intervention's relevance with regard to such priorities and initiatives may be analysed. It is of course important to recall that priorities and interpretations may vary between different stakeholders; a lack of interest and initiatives at central government level does not necessarily imply that there is a lack of initiatives in the country.

Thirdly, the intervention can be assessed in relation to the local problems and context. Has the intervention been designed with consideration to existing gender patterns? Does it address local problems of gender equality and correspond to local interpretation of "gender equality"? Does the intervention address structural gender equality problems or only the symptoms? Is it relevant to the "practical" or to the "strategic" gender needs of men and women?

In connection with relevance, one may also discuss possible synergies - or conflicts - between different objectives. Apart from being an objective in itself, gender equality may e.g. also contribute to economic growth and democracy.

Fulfilment of objectives

Objectives are set at different levels and fulfilment of objectives may refer either to immediate objectives, e.g. that x persons have participated in a seminar on gender awareness, and to overall or secondary objectives¹⁸, e.g. actual improvement of gender equality.

Even though all interventions *should* have clear objectives and indicators for their fulfilment, this is not always the case, particularly not when it comes to gender equality objectives. It is not uncommon that documents express a general concern for gender equality without formulating any particular objectives. The frequent absence of measurable goals and the need to develop impact indicators is mentioned in the Action Programme.¹⁹

The mainstreaming strategy implies that gender equality will usually not be the main, but a secondary, or one of many objectives, of an intervention. As the focus usually is on the main objective, extra attention must be paid to the establishment of objectives and indicators for gender equality when projects are designed and evaluated.

Even in cases where there are no explicit objectives to refer to, there are still often implicit objectives or expressions of interest e.g. that gender equality should be "considered" in the implementation of the project. A general discussion of what has been achieved in this direction may then be better than nothing.

¹⁸ The terminology to indicate objectives at different levels may differ. However, the important point to make here is that objectives, as in LFA, can be placed in a hierarchy.

¹⁹ Experience Analysis, p. 4.

Effects

Effects, or impact, are all the results causally linked to the intervention, positive or negative, foreseen or unforeseen. Thus, they also includes unintended results (side-effects) on gender equality which are not uncommon.

What are effects or impact on gender equality? Gender equality can be described as a state where men and women have the same rights, duties and responsibilities as described in Sida's policy and in the Beijing declaration. Positive effects are those which contribute to this state, and vice versa.

There may be immediate effects and a secondary effects for which the affected groups differ. E.g. the immediate effect may be that gender awareness is raised among the staff of a health ministry and the secondary effect that provision of health services to men and women become more equal. Analysing effects thus requires an insight in the situation and roles of men and women at different levels.²⁰

An analysis of effects on gender equality must consider both women and men. It is not sufficient to state that women have "participated" or that women have "benefited"; this says nothing about how the situation of men and women, *relative* to each other, has changed. If only 20% of the children in a primary school programme would be girls, it would be unequal in Tanzania but perhaps a contribution to gender equality in Afghanistan.

Positive effects on gender equality may be negative for one of the sexes. More influence of women in an area means less influence for men and vice versa.²¹ However, it does not necessarily have to be so; there are changes which may be of benefit to both sexes.

Effects are often difficult to assess, not only when it comes to gender equality; there are few evaluations which present any more extensive assessments of effects in the first place.²² The Experience Analysis confirms that indicators for measuring effects on gender equality have to be developed.²³

Even if effects on gender equality is difficult to prove and to measure, simple observations on how men and women have been affected by an intervention may still be useful. It may also be enlightening to look at the implementation *process*. E.g. if both men and women of the target group has participated in the design of a project, it may be a positive *indication*.

Gender may also be part of the discussion of cause and effect. For example, if a project makes false assumptions on gender roles it is likely to fail.

Efficiency and cost-effectiveness

²⁰ This is also showed with an example in Tobisson and de Vylder, 1997, p. 20.

²¹ As noted in Grönvall, En kortfattad presentation av svenskt jämställdhetsarbete, 1998.

²² For a discussion, see Schill, Granskning av resultatanalyserna i Sidas Landstrategiarbete, 1996.

²³ Experience analysis p. 4.

Efficiency refers to the relation between input and output, and cost-effectiveness to the relation between input and effects. Both require (i) that the value of inputs and results somehow can be quantified, (ii) that inputs somehow can be related to the achievement of certain results and (iii) that some comparisons can be made, e.g. over time or with other interventions.

The cost-effectiveness criteria can, at least in principle, be applied also on an intervention aimed at gender equality.²⁴ However, the “mainstreaming” approach, making gender equality an integrated objective among others, makes it difficult. Promoting gender equality may equally well be a question of target group selection or of applying certain methods. No additional resources will then be needed over and above, say, those for making a gender analysis and to monitor gender equality objectives etc. Of course, also this is important information. However, it will be difficult to meet the three criteria stated above, and the discussion may have to be limited to a mentioning what the approximate costs related to the gender equality objective have been and what this investment has contributed to.

Recognising both men and women as resources for development, gender equality is sometimes also discussed as a matter of making efficient use of resources. This too is a question of cost-effectiveness which may be discussed.

Sustainability

Will the impact on gender equality be lasting? One approach is to look at the extent to which fundamental problems rather than symptoms have been dealt with. Reference may here be made to women’s and men’s practical and strategic gender needs. For example, if an intervention gives women an opportunity to sell handicraft products on the local market, it may have given them a more equal position to men (in terms of access to income) but it has perhaps not created any structural change.

Of course, the usual questions with regard to sustainability may also be asked: will the women/men have an opportunity to apply what they learned at the seminar or will there be funds to maintain the equipment installed to benefit women/men? If gender equality is properly integrated in the intervention, it should be largely sufficient to look at the sustainability of the intervention as such.

2.7 Evaluability

The previous section indicated what *may* be done to evaluate interventions with respect to gender equality. However, there are also limitations, practical as well as theoretical.

Access to data is a crucial factor for any evaluation. Often, there are some data on men and women. However, this is not the same as having access to the specific data required to make an assessment as outlined above; data must be relevant to the analysis to be made. We are referring, for example, to data about the target group (composition,

²⁴ Albeit that in practice it is difficult and in most evaluations the cost-effectiveness analysis is therefore substituted with a rather general discussion of costs and results.

gender roles, problems etc.) about men and women participating in the intervention as well as on whom the intervention has reached.

What is said to be “lack of data” is, at least partly, often a lack of time. If sufficient time is available, data can be generated. Hence, evaluability will largely be a question of how much time is allocated for the analysis of gender equality. How much time is needed to gather and analyse data on the situation of men and women, their respective influence, roles, access to resources etc. and how they have been affected by an intervention?

There are also problems of a theoretical nature, including that of attribution, i.e. finding causal linkages between the intervention and certain events. It is, for example, a well-known fact that an electrification programme will change people’s lives and, most likely, also the relative situation of men and women. However, it is hardly possible to isolate the effects of the electrification programme from other factors, and thus also to attribute higher or lower gender equality to this intervention. It may be necessary to limit the analysis to the very immediate effects of the intervention, but this is not necessarily where the impact on gender equality is to be found. Hence, the extent to which impact on gender equality can be observed will vary between different interventions, depending on whether impact has been direct or indirect.

2.8 What emphasis should be given to gender equality?

Irrespective of what *may* be evaluated, limitations will always have to be made. As a number of issues must be addressed in an evaluation and as both time and report pages are limited, an unavoidable question is: what emphasis should be given to gender equality in relation to other issues? It would seem reasonable to consider the following.

Purpose of the intervention

An intervention should normally be assessed against what it was meant to achieve. If the explicit purpose was gender equality, as with support to women in Chile and Bolivia, it naturally deserves an in-depth discussion of the extent to which this has been achieved. If there was no such objective, the assessment may be limited to a discussion of relevance to the overall gender objective and an analysis of side effects on gender equality.

Potential impact of the intervention

Some interventions may have a considerable impact on gender equality, e.g. the support to education for girls in Afghanistan (97/27), a country of severe gender inequalities. Others, such as geological research (98/8) have much more limited effects on gender equality. Considering how the evaluation should be used - accountability, learning etc. - it is logical that greater attention is paid to gender equality in the first case, where findings on gender equality may have a considerable bearing on decision-making and where there are probably plenty of lessons to be learned.

One problem is of course that usually we do not know whether there has been an impact on gender equality before the intervention has been evaluated, particularly if monitoring has been inadequate. Furthermore, there are projects which *could have* had an impact on

gender equality if differently designed. One had therefore better to talk about the *potential* impact on gender equality and not make premature assumptions.

Purpose of the evaluation

Evaluations are carried out to fulfil different information needs in different situations. Hence, the relative importance of different questions will vary. An evaluation of the Swedish Trust Fund with the African Development Bank (97/1) was carried out with a double purpose: to assess and make recommendations on the operational efficiency of the bank and to assess its project portfolio. Gender equality would appear to be of considerably less importance for the first of these purposes than for the second. Just as there may be reason to make an evaluation with special focus on gender equality, leaving out other questions, however important they may be in themselves, there may sometimes be reason to focus on other issues rather than gender equality.

Gender equality being a cross-cutting issue to be considered in *all* evaluations does not prevent it from being more or less *important* in different evaluations. In recent years, considerable efforts have been made to show that there is always a gender dimension. This has been important and some progress can now be seen. Perhaps the next challenge will be to identify where and in what situations gender equality is more important than elsewhere, so that it receives the attention that it should.

3 Review of Sida evaluations

This chapter presents the findings and conclusions from the review of 42 Sida evaluation reports from 1997 and 1998. It follows the questions raised in the DAC questionnaire, which will appear in bold.

Even though the questionnaire is officially on “gender equality and empowerment of women”, the perspective assumed here is “gender” in its widest sense. The reason for this is that very few reports actually discuss gender *equality*. Limiting the discussion to gender equality in a strict sense would make any analysis virtually impossible. The question of perspective is discussed further later in this chapter.

Question 16: Do there seem to be any significant differences or changes since 1993/94 in terms of increased attention to gender issues in the evaluations with regard to:

- a) sector (e.g. health, education, natural resources)?***
- b) particular kinds or forms of support (e.g. technical assistance, credit, research, project, programme etc)?***
- c) how support is channelled (bilateral, regional, multilateral, NGO)?***
- d) other factors?***

For the comparison over time, the 1992 report WID as a Crosscutting Issue in Development Aid Evaluations is used. That report covered 51 evaluations between 1989 and 1992. However, figures from this and the current review are not fully comparable. First, there may have been differences in interpretations between the two reviews. Secondly, with the formation of “new” Sida, the sample now includes evaluations of former BITS, SwedCorp and SAREC activities. The comparison is thus only indicative.

The table below show the figures of the 1992 review and those obtained in this review.

Table 1: Comparison between data presented 1992 and findings 1998

	<u>1992</u>	<u>1998</u>
Mentioned in ToR	50 %	62 %
Discussed in the report	61 %	65 %
Team with women	63 %	60 %
WID/GAD specialist	15 %	Not known
Gender specific data	41 %	30-50%

Terms of reference

The frequency of gender being mentioned in the ToR is somewhat higher now than in 1992. In 1998 gender or gender equality was mentioned in 26 out of the 42 evaluations reviewed. But *where* and *how*?

The table below shows *where* in the ToR gender or gender equality is mentioned. Please, note that in some reports it has been mentioned at several places and in 16 reports not at all.

Table 2: Place in ToR where gender is mentioned (1998)

<i>Place in ToR</i>	<i>Frequency</i>	<i>Percentage of total reports</i>
Background	3	7 %
Purpose and scope	4	10 %
The assignment/issues	23	55 %
Methodology	1	2 %
Evaluation team	5	12%
Reporting	0	0%

Gender is usually listed among the various issues or evaluation criteria as part of the assignment. Only in the interventions with a clear gender content, such as the support to women in Chile (97/28) or Diakonia's Human Rights support (97/32), is gender mentioned in the background, in the purpose or in connection with the team.

Table 3 shows in what connection gender primarily is mentioned.

Table 3: In what connection gender is mentioned in ToR (1998)

<i>References made with respect to gender</i>	<i>Frequency</i>	<i>% of total</i>
Reference given to gender objectives in project	6	14%
Reference is made to Swedish develop. objectives/policy	3	7%
Reference is made to men and women of the target group	0	0%
Gender is mentioned in connection with evaluation criteria	3	7%
Reference is given to particular questions or issues	5	12%
Gender is mentioned without particular reference	9	21%
Gender is not mentioned	16	38%
Total	42	100%

It is noteworthy how differently "gender" may be introduced in the ToR. In some cases reference is made to gender objectives to be followed up, e.g. the Chile and Diakonia studies mentioned above. In some ToR, reference is made to Swedish development objectives including gender equality, e.g. environment-friendly district heating in China (98/17), opening the way to a discussion of relevance and side effects. Often gender is related to some particular issue, such as "increased local participation" in the Pahal Project - India (97/17) or "programme implementation modalities" in UNICEF's Child Rights Programme in Latin America (97/21). The question of gender is then being confined to a particular problem area. Reference is hardly ever, at least not explicitly, made to men and women in the target group. Usually gender is mentioned without any particular reference at all. It is lined up, either as one topic among all the other to be covered by the evaluation, or along with the evaluation criteria ("relevance, gender, cost-effectiveness, etc.") In the latter case, "gender" becomes somewhat of an evaluation criteria on its own. However, little guidance what to include in the analysis is given to the evaluator.

Gender discussed in the report

Gender is mentioned in the reports slightly more often nowadays than in 1992, in 27 reports out of 42 or which is 64 % of total.

There is a strong correlation between the mentioning of gender in the ToR and in the reports. In the 14 cases where gender equality had not been mentioned in any way it was not requested in the ToR either. However, as observed also in the 1992 and 1996 reviews, gender is mentioned in the reports slightly more frequently than in the ToR.

Being “mentioned” can mean anything from a brief note to a more elaborate discussion of gender. Table 4 gives an indication of the attention paid to gender.

Table 4: Mentioning of gender in the report (1998)

<i>Mention</i>	<i>Frequency</i>	<i>% of total</i>
Not mentioned at all	14	33%
Not mentioned, with reason(s)	1	2%
Briefly mentioned	7	17%
Some discussion	16	38%
Extensive discussion	4	10%
Total	42	100%

In one-third of the reports there was no mention of gender at all. Only in one case have the consultants refrained from discussing gender and given a reason for this: it was not considered relevant. One tends to get the impression that many evaluators try to say at least something on gender, whatever it may be, rather than explain why they (sometimes quite obviously) do not think that it is necessary or feasible.

“Briefly mentioned” refers to when gender has been mentioned on one or two lines or if gender disaggregated statistics have been included with no further comments.

“Some discussion” refers to when there has been some type of reasoning about gender in at least one whole paragraph. This is how gender is treated in most reports.

An “extensive discussion”, including both presentation of facts and some kind of more elaborate discussion is only found in the studies where gender has been an important component, such as the support to the women’s movement in Bolivia (98/5) and through the Swedish committee for Afghanistan (97/27).

Please note that the above figures say nothing about the *quality* of the discussion. There are plenty of examples of rather lengthy but weak and speculative discussions about women, as well as of short but concise and important statements.

Teams with women

In 60 % of the evaluations reviewed, the team included women, as compared to 63% in 1992, i.e. a slight decrease. However, other Sida statistics show that the *total* number of

female team members and team leader has increased over the last years.²⁵ Table 5 shows the composition of teams.

Table 5: Gender composition of teams (1998)

<i>Composition of teams</i>	<i>Frequency</i>	<i>% of total</i>
Men and women	22	53%
Women only	3	7%
Men only	17	40%

The sample includes a number of evaluations which have been carried out by one person only. The large number of “men only” contains a large number of such one-*man* evaluations.

Ironically, the two evaluations of interventions with an outright gender profile (Chile and Bolivia) did not have mixed evaluation teams but were carried out by women only.

WID/GAD specialist

The 1992 study used two criteria to determine if a person was a “WID/GAD” specialist: (i) relevant training, meaning that the person apart from having a “basic social orientation” should have participated at least in one of Sida’s starter courses in Gender Aspects of Development, and (ii) an assessment of the results as shown in the report (“evidently somewhat subjective” according to the authors themselves).

Information on the competence of the persons that have undertaken an assignment is usually scarce. It has not been possible to determine how often a WID/GAD expert, using the definition above, has been participating in the evaluations reviewed. However, as Sida started to give courses on gender in the early 1990s and has continued to do so since, it may be assumed that more evaluators now have participated in such a course. Furthermore, the fact of gender equality having received increased attention in recent years indicates that there should be more experience and thus more WID/GAD expertise. Comparison with the second criteria (results shown in the reports) is not feasible, as this would require a comparison of the *quality* of the 1992 and 1998 reports.

What is to be considered a “gender ” specialist may of course be subject to discussion. Possibly it was easier to be a “specialist” in 1992, when fewer persons had experience of gender analysis.

Using the shown performance of the person as a criterion is logical in one way. However, it seems to assume that only a “specialist” can make a good analysis, and that a specialist cannot make a poor analysis.

This question is linked to the issue of whether or not it is a good thing to have a person specially assigned to cover gender issues. Sometimes this is said to have contributed to gender equality being looked upon as a separate issue and to have reduced the efforts of other consultants. With a mainstreaming approach it would seem more important for *all*

²⁵Reference is made to other questions in the DAC questionnaire filled out by Sida.

team members to have *some* knowledge of gender equality and to share responsibility for assessing gender equality. As the level of competence in this field is raised, the need for specially assigned persons to analyse gender ought to diminish.

Gender-specific data

Neither is it obvious how “collecting gender-specific data”, as referred to in the 1992 review, should be interpreted. As will be seen from tables below, 30% of the reports present some gender-disaggregated figures or statistics. 52% of the reports present some kind of findings on gender, though not necessarily what could be referred to as data. The 1992 figure, 41%, lies somewhere in between.

Sector

The analysis carried out in 1992 included 14 different sectors. Sometimes there were only one or a few evaluations in each category, which is not a big enough sample for meaningful comparisons. Furthermore, the classification of interventions into different sectors is not always clear-cut and there may easily be differences of interpretation.

The somewhat broader categorisation used in the new data work sheet provide a better framework for analysis. However, even though the figures are valid for the reports reviewed, conclusions should not be taken too far. There are too many different factors that may determine variations in how gender is treated in evaluations.

Table 6: Treatment by sector

	Not mentioned	Not included, explanation	Briefly mentioned	Some discussion	Extensive discussion
Social (14)	5	0	2	3	4
Infrastructure (8)	3	0	1	4	0
Economic sectors (7)	1	1	3	2	0
Public administration (7)	1	0	1	5	0
Disaster relief (1)	0	0	0	1	0
Multi-sector (5)	4	0	0	1	0

Evaluations within *social* sectors include some in which gender is discussed extensively. These include the support for gender equality in Chile (97/28), Sida support to World University Service, South Africa (97/39) and the Swedish Committee for Afghanistan (97/27). What these all have in common is that gender equality has been an objective of the interventions. However, there are just as many evaluations within the social sectors where there is no mention of gender, e.g. UNICEF’s Child Rights Programmes in Latin America (97/21), Expanded Programme on Immunisation in Zimbabwe (98/14), Support to Higher Education in Mozambique (97/30) and Selected aspects on the university system of Nicaragua (98/13) - all of them evaluations of interventions where one would imagine the potential impact on gender equality to be substantial.

No *infrastructure* evaluations discuss gender extensively. Out of a total of eight, four have some discussion, but they are generally rather weak: Swedish contribution to the Conkan Railway Construction in India (97/25), Swedish support to the Power Sector in

Vietnam (98/10) and Environment-friendly district heating in China (98/17). The evaluation of sewerage and water sector projects in Egypt (98/7), which actually included a women-focused component, only mentioned gender equality briefly. Three evaluations have no discussion of gender equality.

Evaluations within *economic* sectors are quite varied. They include two SAREC programmes (97/14 and 98/16), enterprise development through Start East (97/6), Pahal Project for human and land resources development (97/17) and support to the banking sector in Vietnam (98/2). Discussion of gender is usually brief or lacking, with the exception of the Pahal and the dryland programmes.

Public administration interventions evaluated include five AMS and AMU labour market projects implemented in different Eastern European countries. Four of these have some discussion of gender, though quite brief. The evaluation of public auditing in Southern Africa (98/11) also includes some discussion. The evaluation of support to the geological surveys of Estonia, Latvia and Lithuania (98/8) mentions gender very briefly.

The only evaluation classified as *relief*, World University Services' scholarship programme to political refugees (97/26), had some discussion of gender.

Multi-sector refers to evaluations which covers interventions in different sectors, such as the Swedish consultancy trust fund with the ADB (97/1), development co-operation between Guinea-Bissau and Sweden (97/23) and Sida-supported projects in Thailand 1986-1998 (98/18). In none of these three evaluations is gender raised. In the evaluation of Sida supported co-operation between Swedish and Baltic NGOs (98/6) there is some discussion.

What conclusions can be drawn from this? It may first be noted that interventions within each sector may differ considerably; infra-structure may include highly gender sensitive water programmes as well as technical interventions with limited potential to influence gender, at least directly. Thus, there is no obvious correlation between sector and the way gender equality has been - and perhaps should be - treated.

However, reference could be made between what was said earlier on evaluability. When the target group is identifiable and effects are direct it is relatively easy to analyse impact on gender equality. Among the reports studied, one may distinguish between, on the one hand, interventions that have a clearly defined target group on which there is a direct impact on gender equality, e.g. the Swedish Afghanistan Committee or Pahal Human and land resource development project (97/17) and, on the other hand, interventions where impact on gender equality is indirect and the target group less specified, e.g. the support to the Tanzania's power sector (97/24) or Environment & Land Management Sector Activities (97/4).

Even though there are considerable variations, social sector interventions probably tend to have a particular target group on which there is an immediate impact more often than for example infra-structure interventions. This may partly explain why all the extensive analyses have been in social sectors and none in infrastructure sectors.

The fact that most multi-sector evaluations lack discussion of gender may be a question of the time available in relation to the scope of the evaluation. Having to address a large

number of interventions with different target groups it may become difficult to say something meaningful about gender and gender equality.

Particular kinds of or forms for support

Out of the 42 evaluations analysed, 34 refer to project support, 5 to sector support and 3 to programme aid (categories from the Sida work sheet). There are no signs that there is a different treatment of gender for these four categories.

How support is channelled

Out of the interventions studied 35 were bilateral, 2 multilateral and 5 channelled through NGOs. There are no indications that there would be a general correlation between the way support is channelled and the way in which gender is included in the evaluation. The bilateral interventions were observed to be very mixed. The five NGO-projects include some relatively elaborate discussions on gender such as Afghanistan (97/27) and Diakonia (97/32) as well as some less elaborate: Library associations (97/13) and Baltic NGOs (98/6). In the first cases gender equality was an important dimension of the intervention and in the Diakonia case, gender equality was one of the objectives of the programme. This was not the case in the Library project. None of the two evaluations of multilateral interventions (97/1, ADB and 97/21, UNICEF) did include a gender discussion, but they are too few for any conclusions to be drawn.

Other factors

Two other factors related to the interventions that appear to be crucial for how gender is addressed should be mentioned.

The first is the objective of the intervention. When gender has been well addressed, gender equality has often been an explicit objective (or sub-objective) of the intervention (E.g. in the cases of DIAKONIA and World University Services). Being an objective, it can hardly be avoided to tread gender in the evaluation. However, in most interventions gender equality has not been an explicit objective which ought to be one reason why it was not mentioned in the evaluation either.

The second refers to the potential impact of an intervention. Determining this is of course difficult. However, to give a general *indication*, the evaluation reports were roughly divided into three categories, those with potential *major* impact (e.g. the support to Women in Chile and Bolivia, health and education support of the Swedish Committee for Afghanistan), *some* impact (e.g. the Start East programme and the Banking support in Vietnam) and *limited or no* impact (e.g. satellite mapping and research on bio-enzymes).

Most interventions with an assumed major impact on gender equality had some, or an extensive discussion of gender. Most interventions believed to have no or limited impact did not mention gender in the report. Among interventions believed to have some potential impact on gender equality, being the majority, approximately 50% had some

discussion while the other 50% had no or only a brief discussion of gender. This would seem to indicate that interventions with high potential impact on gender equality are in fact receiving more attention in evaluations than those with lower potential impact. However, the fact that most interventions do have some impact on gender equality is not adequately reflected in the evaluation reports.

Question 17:

a) Do the selected evaluation reports include sex-disaggregated figures and statistics?

While about one third (13) of the evaluation reports present sex-disaggregated figures or statistics, about one third have aggregated statistics and one third present no statistics at all (on people). Table 7 shows at *what level* figures and statistics are presented.

Table 7: Disaggregated figures and statistics

Disaggregated figures/statistics at target group level	7
Disaggregated figures/statistics at process level	5
Disaggregated figures and statistics at result level (output and effect)	3
Only aggregated (men & women) at any of the above levels	14
No statistics (on people) at any of the above levels	15

One and the same evaluation can of course present disaggregated figures at more than one level but this is seldom the case. The sample include five evaluations of labour market projects (AMS and AMU) which all present brief unemployment statistics, i.e. at target group level, divided by sex. However, nothing is then said on the number of men and women that the project has reached. The community rehabilitation evaluation (98/15) gives information on the percentage of female caretakers but not on the number of disabled men and women they are taking care of.

If the five labour market projects are excluded, hardly any evaluations present gender disaggregated figures at target group level. This is an indication of the quality of target group discussions. There is also an almost total absence of figures and data at result level. To the extent there are any, they refer to output, e.g. the number of male and female refugees that received financial support within the World University Service programme (97/26). That disaggregated figures and statistics at process level is somewhat less uncommon probably reflects the fact that such figures are more accessible.

b) Do the evaluation reports include systematic consideration of progress towards gender equality and women's empowerment in assessments of activities, outputs, or results, and benefits, effects or impact?

Generally speaking, none of the evaluations do. The "gender issue" is raised in different ways and in different detail, but a systematic analysis of problems, objectives, output and effect is hardly ever made. So, how can the assessments be described?

Data, conclusions, recommendations

An evaluation may be expected to present certain data or information, draw conclusions and present recommendations. The table below shows how far the evaluators have gone with respect to gender in the 27 reports where it has been included.

Table 8: Data, conclusions, recommendations

<i>Presented in the report</i>	<i>Frequency</i>	<i>% of all reports</i>
Presents data/information on gender	22	52 %
Draws conclusions on gender	19	45 %
Gives recommendation on gender	14	33 %

The table indicates that half of the evaluations present findings, somewhat fewer go on to draw conclusions and still fewer give recommendations. However, it is not uncommon that reports present “conclusions” without any findings supporting them. There are also recommendations being made (typically: “in the next phase gender should be included”) which are not derived from the evaluation.

Follow-up level

As stated in the Action Programme, follow-up can be made at several levels: intentions (objectives), processes (activities) and results (output and outcome/effects). In addition to this, an evaluation must consider the local context and problems. Table 9 shows at what level gender has been followed up.

Table 9: Level of analysis

<i>Discussed in the report</i>	<i>Frequency</i>	<i>% of all reports</i>
National context and problems	9	21 %
Intentions	14	33 %
Processes	19	45 %
Results	12	29 %

Clearly, the most common practice is to comment on what has taken place within the project itself, the process, e.g. how many of the researchers in the Dryland research programme that were women (97/16) or the sex of the workers building district heating plants in China (98/17). Fewer reports comment on results, and when they do, statements are often rather vague. Of those reports that comment intentions, some nine do so because there has been some gender objective in the intervention. The most striking finding is that there is usually no mentioning of the national context and problems. Hence, there is nothing to relate the intentions and results to. Only in three cases has there been a consistent analysis at all four levels: the support to the women’s programmes in Chile and Bolivia (where this should be expected) and the Afghanistan case.

Target group analysis

A question related to this last observation is to what extent there has been a gender sensitive target group discussion?

Table 10: Target group discussion

<i>Type of target group discussion</i>	<i>Frequency</i>	<i>% of all reports</i>
Gender sensitive target group discussion	11	26 %
Gender blind target group discussion	18	43 %
No target group discussion at all	13	31 %
Total	42	100 %

Only in 11 cases was there some target group discussion distinguishing between men and women. In the other cases target group discussion was either gender blind or missing completely.²⁶ Discussion of stakeholders with respect to gender was even rarer. The lack of a gender sensitive target group and stake holder discussion is serious, as this is the starting point of any analysis of gender and gender equality.

Evaluation criteria

How is gender discussed with regard to Sida's normal evaluation criteria? Table 11 shows the type of discussion found in the reports (not necessarily under such a heading):

Table 11: Gender and the evaluation criteria

<i>Discussion with regard to:</i>	<i>Frequency</i>	<i>% of all reports</i>
Relevance	5	12 %
Fulfilment of objectives	10	24 %
Side effects	18	42 %
Cost effectiveness	0	0 %
Sustainability	3	7 %

To the extent gender is included it is usually discussed as a side effect. In 10 cases it is treated as a matter of fulfilment of objectives, corresponding more or less to the number of interventions where gender equality seems to have been a primary or secondary objective.

Despite the well known controversy over why, and if gender should be considered in the interventions, there is hardly ever any relevance discussion with respect to gender. Relevance may be assessed to *local context and problems* but it was already seen that this was a weak link. There is the relevance to *Swedish development objectives*. Evaluators could simply state whether or not the interventions have been designed to contribute to the gender equality objective, but this is rarely done. Finally, there is the relevance to *local objectives*. No evaluations, apart from the two on support to government institutions for women in Chile and Bolivia, state anything about national

²⁶ It has not been possible to determine the number of projects that in fact *have* a target group in terms of men and women, such as the scholarship programme of WUS in Latin America (97/26) and those that *have not*, such as geological surveys (98/8) or research on enzymes as bio-sensors (97/38).

objectives and priorities in terms of gender. The relevance discussion stands out as the weakest part in many evaluations.

Perspective

Are the reports talking about women, men and women, or gender equality? It is often not quite clear. The below figures should be seen as very indicative.

Table 12: Perspective in the evaluation

<i>Perspective</i>	<i>Frequency</i>	<i>% of all reports</i>
Women	14	33%
Men and women/gender	11	26%
Gender equality	2	5%
“Gender blind”	15	36%
Total	42	100%

First of all, it may be noted that over a third of the reports are totally gender blind. To the extent there is any discussion, it is usually about women and women only. Attempts are often made to see if the intervention in any way could benefit or have side effects on women but never if it could have any side effects on men, or if interventions would lead to men getting access to fields traditionally held by women. 11 reports mention both women and men, e.g. their percentage in a particular group, however, even then usually in connection with a discussion of women. Very few reports go beyond just talking about men and women in isolation and introduce some kind of “equality” perspective.

The reports display the confusion about terminology. “Women” and “gender” are often used as synonyms. From having talked exclusively about women one report (Conkan railway, 97/25) concludes that “There seems to be nothing in this project which would (...) contribute to the equalisation in terms of gender”. Behind all of the above lies of course again the assumption that supporting women is the same as a support to gender equality. However, this assumption is not made explicit and is not related to the particular intervention.

c) Please, summarise any specific observations that can be made in connection with evaluation preparation and/or approaches and methodology about what seems to have worked well in terms of providing good assessments of gender equality and women’s empowerment in evaluation reports (e.g. special Terms of Reference, specific evaluation preparation and/or briefing, etc).

It has not been possible, as originally planned, to identify a number of evaluation reports that were good and seek to identify factors why. Different evaluations may be good in one or the other way but there are simply no “model” evaluations.

Still, the reading of 42 evaluations at least tend to confirm some common hypotheses on success factors. These include the following:

- Clearly stated objectives and indicators: Often, the evaluators do not seem to have known what to look for simply because there were no objectives in terms of gender in the interventions. When there have been such objectives, the evaluation has also been better.
- Availability of data: Evaluators seem keen on incorporating data when it is readily available. Still, data is often missing in the report. This may partly explain the weak analyses.
- Mentioning in ToR: It is not only a question of mentioning gender in the ToR but just as much *how* it is mentioned. When ToR are vague or confused it is not surprising to find that many evaluation reports are as well.
- Time: Another crucial factor is *time*. Any collection and analysis of information requires time and the area of gender equality is no exception.²⁷ Acquiring a proper understanding of the roles of men and women and how they have participated in and been affected by the intervention is a complex matter. The better assessments of gender are usually found in more ambitious evaluations (in terms of time and cost). Gender discussion is typically brief or missing in shorter evaluations. Looking at the number of items included in the ToR and the time available, it often becomes quite obvious why the analysis of gender is weak. Has the increased requirements on assessments of gender in recent years been reflected in the allocation of time?²⁸
- Evaluators' competence: Even though it has not been possible to determine the evaluators' competence, it becomes quite obvious when reading the reports that some master the issue of gender and some do not.
- Evaluators' efforts: Though it is difficult to provide any evidence, one easily gets a feeling that in some cases the evaluators have tried harder than in other.
- Local participation: (See below)

d) Has your agency employed participatory approaches in the selected evaluations? How are the participatory approaches defined and described? If yes, do these seem to have had any bearing on attention to gender equality and women's empowerment? If yes, please describe how, and/or provide examples in connection with the following (participation of partner country evaluators; participation of local-level stakeholders in evaluations; consultation with local groups; consultation with women's groups and/or groups that work with issues of gender equality and women's empowerment)

Only one evaluation comes close to what could be characterised as "participatory". It was the one on community-based rehabilitation (CBR) in Zimbabwe (98/15), carried out

²⁷ Also Tobisson and de Vylder notes that "a satisfactory analysis of the impact on (...) gender equality tends to require much time, knowledge and understanding.

²⁸ Jerker Carlsson et al. Using the Evaluation Tool, 1997 pages 22-23 discusses how the time frame for an evaluation is set. It states that "it is reasonable to assume that the costs are not based on careful analyses of evaluation methods."

by the local CBR monitoring committee and involving 1234 interviews at all levels including the target group (the disabled). Its discussion of gender is nothing extraordinary but it is interesting in some of its observations, e.g. “the majority (of the local facilitators) were female. This is in line with women’s role in the Zimbabwean society. It is much easier for a woman to enter and be welcomed into people’s homes than it is for a man”.

The roles of men and women are rather country specific, considerably more than e.g. technical and economic matters. Local consultants and stakeholders may see things with different eyes than foreign evaluators. They may contribute with other knowledge and may also represent a different set of values. No far reaching conclusions should be drawn from the Zimbabwe example, nor is it possible to observe, generally, that the evaluations where local or regional consultants have participated provide better analyses of gender. However, a hypothesis could be that local participation is particularly important for the assessment of gender as it is country specific.

e) Can any specific observations be noted about substansive results and impact in the field in terms of progress towards gender equality and women’s empowerment as presented in the selected evaluation reports? If yes, please provide at least one example of Good Practice in terms of projects demonstrating positive benefits and impact in terms of gender equality and women’s empowerment as demonstrated through evaluation, by submitting evaluation reports, and by briefly describing the relevant intervention (s).

26 evaluations reported in some way on impact on gender equality and women’s empowerment.

Table 13: Impact as reported by the evaluations

<i>Reported impact</i>	<i>Frequency</i>	<i>% of all reports</i>
No or very limited impact	13	31%
Some impact	9	21%
Major impact	4	10%
No information	16	38%
Total	42	100%

The table shows that there were just as many evaluations reporting some impact as reporting no impact. In 16 evaluations there was no information.

An intervention may have a direct and/or indirect impact, positive and/or negative. Table 14 shows the nature of impact in the 13 evaluations where some or major impact was reported.

Table 14: Nature of impact

<i>Impact reported</i>	<i>Frequency</i>	<i>% of all interventions</i>
Positive direct impact	13	30 %
Positive indirect impact	6	14 %
Negative direct impact	0	0 %

Negative indirect impact	0	0 %
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Please, note that the tables show what was *reported*, not necessarily actual *impact*. That a direct impact is reported more often than indirect impact does not necessarily mean that the latter has been less important but rather that it is more difficult to observe and therefore reported more seldom. No negative impact, either direct or indirect, has been reported. This probably reflects the fact that very few evaluation reports seem to have tried to identify negative side-effects in the first place.

The evaluations indicating a major positive impact are

- The Pahal Project, India (97/17)
- The Support for Gender Equality in Chile (97/28)
- Support to World University Service, South Africa (97/39)
- Support to the Women's national programme in Bolivia (98/5)

The support to the women's programme in Bolivia and Chile can be characterised as institution building programmes within entities concerned with women and gender equality. The Pahal project is characterised by its participatory working methods and women are said to have become more active as citizens and been given a increased self-esteem. It has not had an outright gender focus but the progress towards gender equality has been a result of the participatory process. World University is said to have been successful in incorporating a gender perspective in its co-operation with local NGOs. Abstracts of these reports are given in Annex 5.

f) Are monitoring/performance indicators and evaluation criteria in the selected evaluation reports gender sensitive?

There is little evidence that monitoring and performance indicators of the projects have been gender sensitive, at least this is not reflected in the reports. However, this could only be confirmed with a study of the project documentation.

As could be seen from table 11, the regular evaluation criteria are usually not applied with respect to gender.

g) Can any other changes be noted in agency evaluation reports with respect to gender equality and women's empowerment since the 1993/94 DAC assessment.

It is not possible to identify any other *changes* as the material for comparison is limited. However, some further reflections on the evaluations reviewed can be made.

Absence of methodology

None of the reports reviewed states anything about *how* gender has been analysed and assessed. Most reports contain limited information on methodology in the first place. However, the observation is an additional indication that gender is probably not analysed in a very methodological way.

Validity and reliability

Two common requirements on research reports is that the content should be valid and reliable. The reports show weaknesses in both respects.

The evaluation report sometimes present information and draw conclusions which are simply beside the point. An example of this are the labour market projects aiming at a better functioning labour market. The report notes that most staff in the labour offices are women, and therefore concludes that the support has benefited women. Nothing is said about whether the institutional support provided by AMS has contributed to gender equality in terms of employment for men and women. This tendency to focus at the immediate participation of men and women while ignoring it at - the important - impact level is not uncommon.

Also reliability may be low. There is frequently a lack of hard data, but even then there is a tendency to try to say at least something, often resulting in rather speculative discussions. An example is the statement that a possible impact of the Conkan railway (97/25) could be that women are able to sell handicraft at the train stations.

Presentation in the report

It is difficult to divide reports into those where gender is “integrated” in the text and those with a separate section on gender. The reports that have a special section on gender also often make reference to men and women in other parts of the report. Sometimes when gender could be said to be “integrated”, it is only in the form of a few scattered comments on men and women.

The question whether or not there is a separate *section* on gender seems to be of less importance. The crucial question is whether *what is said* (in a separate section or not) is linked to what is said in the rest of the report, i.e. relates to the problem description, objectives, output etc; whether it is integrated in terms of content. Then, a separate section on gender may even highlight gender and make it visible, just as any other important issue. The central problem that can be observed is not that the gender discussion sometimes is confined to a particular page or section but that gender is discussed as a separate issue all together.

Demand for, and use of the assessments of gender

It has not been possible to determine how the information, conclusions and recommendations presented on gender have been used. The fact that many ToR still do not include gender, and that reports are accepted despite very weak assessments of gender indicate that the actual demand for such assessments is limited. One easily gets the feeling that gender is included in the ToR because it should be so, not because of how the evaluation should be used. To look at the demand for, and how assessments of gender are *used*, should be a high priority for continued research.

Problems are not specific to gender evaluation

A number of methodological problems discussed above (lack of objectives and indicators to refer to, unavailability of data, time limitations etc.) are in no way specific to the analysis of gender but general problems in most evaluations.

Other cross-cutting issues

How to deal with gender equality in evaluations may be seen as part of the larger question of how to deal with “cross-cutting” issues in general. Environment, poverty, democracy and children’s rights, just to give a few examples, should also be addressed in evaluations. There are several reasons for discussing gender equality in a broader context. First, introducing a large number of cross-cutting issues may result in a lack of focus, and possibly even certain competition between different interests. This must be avoided. Second, from a methodological viewpoint there are many similarities between how to deal with gender equality and other cross-cutting issues. Hence, there could be many opportunities for learning.

4 Main conclusions and recommendations to Sida

4.1 General on the evaluation of gender equality

Gender equality is an overall objective of Swedish development co-operation and should be treated as such also in evaluations. As it refers to the situation of men and women in the target group, the target group analysis provides a natural starting point. The interventions may then be assessed with the regular evaluation criteria of Sida, i.e.

- relevance (*to national and Swedish gender equality objectives, and the local gender context*),
- fulfilment of (*gender equality*) objectives,
- effects (*on gender equality*),
- cost-effectiveness (*in the achievement of gender equality effects*),
- sustainability (*of the effects on gender equality*).

Even though there is a gender dimension in any intervention, the relative importance of analysing gender equality will vary depending on, inter alia, the objective of the intervention, its potential impact on gender equality and the particular purpose of the evaluation.

Evaluability, i.e. the extent to which assessments are possible to make, vary between different interventions. In practice, it also depends on the amount of resources (time) allocated.

How to address gender equality in evaluations can be seen as part of the broader issue of how to address and integrate the various cross-cutting issues of Sida.

The questions and problems arising in connection with the evaluation of gender equality are otherwise rather similar to those arising in evaluation work in general.

4.2 Findings from the review of evaluation reports

In 65% of the reports reviewed there was some mentioning of women and/or men, a slight increase compared to the 61 % noted in 1992. However, the main problem is not the quantity but the quality of the assessments.

Mostly, gender equality is discussed quite briefly, as a side effect or as a separate matter altogether. The discussion often lacks the natural linkage to the of target group analysis. The relevance of the interventions to the local gender context is hardly ever analysed. To the extent gender is discussed it is usually in respect to implementation processes, not objectives and results.

There is a confusion in terms of vocabulary; “women”, “gender” and “gender equality” are often used interchangeably. In practice, most reports talk about women and how they may have benefited from the intervention. Hardly any reports introduce an equality

perspective and discuss how women's situation vis-a-vis that of men may have changed as a result of the intervention.

There is often a lack of data and an inconsistency between findings, conclusions and recommendations.

Out of the 42 evaluation reports analysed, 26 give *some* indication on results: evaluations 13 report no or very limited positive impact, 9 some positive impact and 4 major positive impact. There was no reporting of negative impact on gender equality. Please, note that these figures are unreliable as analyses often are weak.

4.3 Some possible explanations

Factors contributing to the, generally speaking, poor assessments of gender equality can be found in the whole chain from how objectives and indicators are established in the intervention to the planning and implementation of evaluations.

Few of the interventions evaluated appear to have had clear objectives and indicators for gender equality.

There seems to have been an almost total lack of base-line and monitoring information related to gender equality.

Only 62% of the ToR mentioned gender, i.e. a slightly lower figure than for the mentioning of gender evaluation reports. It was an increase from the 50% seen in 1992. However, ToR were often vague, giving little guidance as to what the analysis should include.

The time allocated for many evaluations does not seem sufficient to analyse gender equality satisfactorily.

In some cases, there are good reasons to assume that the actual impact on gender equality has been marginal.

In other cases, the actual evaluability has been low, as impact on gender equality seem to have been indirect and difficult to isolate from external factors.

Knowledge and experience of evaluating gender equality still appears to be limited, as well as access to guidance for those who need it.

The confusion regarding terminology on gender and gender equality is an additional problem.

It has not been possible to determine how findings on gender in evaluation reports are used but there are indications that the actual demand for such information is limited.

4.4 Suggestions for improved evaluation of gender equality

The following list presents a number of possible measures to improve evaluations with respect to gender equality.

The intervention

- A gender analysis is carried out at the start of the intervention, preferably as part of the target group and stake holder analysis;
- Objectives and indicators for gender equality are clearly stated (in line with LFA);
- Monitoring information on gender equality is produced during implementation;

Preparation

- The purpose of the evaluation, with regard to gender equality, is clearly defined;
- The intervention's potential impact on gender equality is assessed tentatively;
- The evaluability of gender equality is considered;
- The ToR (reflecting the above) specifies what the analysis of gender should include;
- Sufficient time for an analysis of gender equality according to the ToR is allocated;
- An evaluation team with the competence to assess gender equality is contracted;
- Evaluators are adequately briefed and provided with background information on gender equality;

The Evaluation Process

- Data on men and women is collected and analysed;
- The evaluators consult both men and women;
- The evaluators try to get secondary information on gender equality if needed;
- The evaluators consider the fact that men and women often communicate differently;
- Gender equality is assessed with the regular evaluation criteria of Sida;

The Evaluation Report

- The report corresponds to what was requested on gender equality in the ToR;
- The overall scope of the study determines the scope of the gender discussion;
- The discussion of gender is integrated in the report;
- The findings, conclusions and recommendations on gender equality are relevant for the intended use of the evaluation;

Use of the evaluation

- The evaluation report is disseminated to all parties with an interest in it;
- The evaluation report is used for control and accountability purposes;
- Findings, conclusions and recommendations on gender equality are reflected in decision-making and policy formulation;
- "Lessons learned" concerning gender equality are fed back into operations and spread to others that may have an interest in them.

4.5 Recommendations to Sida

In order to achieve the above, Sida is recommended:

- to initiate an internal discussion of the uses and need of information on gender equality;
- to arrange training opportunities for staff and consultants concerned on evaluation of gender equality, either as separate events or as a component of Sida's gender courses;
- to highlight gender equality in its evaluation policy and evaluation manual;
- to continue to monitor, and try to learn from, ways in which gender equality is addressed in its evaluations;
- to promote the development of impact indicators, and practical methods for assessing gender equality;
- to promote the use of a common vocabulary, stressing that the focus should be on the gender-equality objective;
- to co-ordinate the efforts to address the different cross-cutting issues, including gender equality, in evaluations;
- to allocate sufficient resources and time for proper evaluation of gender equality or to adjust its ambitions in this respect;
- to continue its efforts to raise the standards of evaluations in general, so as also to obtain better analyses of gender equality.

Annex 1: Terms of Reference

1998-08-28

Diarienummer:
UTV-1997-0026**TERMS OF REFERENCE FOR SIDA'S FOLLOW-UP OF THE DAC
1993/94 WID ASSESSMENT CONCERNING EVALUATION****1 BACKGROUND**

The DAC Working Party on Aid Evaluation has discussed a number of actions that could be part of the Group's input to the DAC Gender Action Framework. One of the actions suggested and agreed on, is a review of the implementation of the recommendations of the 1993/94 Assessment of DAC Members' WID Policies and Programmes concerning evaluation.

The purpose of the DAC follow-up review is to discover the extent to which the observations of the 1993/94 Assessment have been taken into consideration, and its recommendations followed. The recommendations included inter alia: (1) the adoption of more participatory approaches in overall project design; (2) improvement in the quality of evaluations and in the assessment of the effects and impact with regard to gender equality and women's empowerment; and (3) better attention to issues of gender equality and women's empowerment in evaluation Terms of Reference..

The DAC Working Party on Aid Evaluation has decided to perform the follow-up review through a questionnaire to members of the Working Party, focusing on evaluation policy and practice.

In order to provide answers to the questionnaire and at the same time identify good approaches to gender equality and women's empowerment in evaluations, Sida's Department for Evaluation and Internal Audit together with the Policy Secretariat has decided to commission the study outlined below.

2 PURPOSE AND SCOPE OF THE EVALUATION

The purpose of the study is twofold:

(1) The study will provide background information and answers to questions 16 and 17 in the DAC questionnaire concerning gender equality and women's empowerment in evaluations.

(2) The study will try to identify good approaches to gender equality and women's empowerment in evaluations.

3 THE ASSIGNMENT (ISSUES TO BE COVERED IN THE EVALUATION)

A. DAC questionnaire

The Consultants are to assess a sample of Sida evaluation reports during the years 1995-1997, in terms of their analysis of gender equality and women's empowerment. The analysis will provide background and answers to questions 16 and 17 in the enclosed DAC questionnaire (Annex 1).

Question 16:

Do there seem to be any significant differences or changes since 1993/94 in terms of increased attention to gender issues in the evaluations with regard to:

- a) sector (e.g. health, education, natural resources)?
- b) particular kinds of or forms for support (e.g. technical assistance, credit, research, project, programme, etc)?
- c) how support is channelled (bilateral, regional, multilateral, NGO)?
- d) other factors?

Question 17:

- a) Do the selected evaluation reports include sex-disaggregated figures and statistics?
- b) Do the evaluation reports include systematic consideration of progress towards gender equality and women's empowerment in assessments of activities, outputs or results, and benefits, effects or impact?
- c) Please summarize any specific observations that can be made in connection with evaluation preparation and/or approaches and methodology about what seems to have worked well in terms of providing good assessments of gender equality and women's empowerment in evaluation reports (e.g. special Terms of Reference, specific evaluation preparation and/or briefing, etc).
- d) Has your agency employed participatory approaches in the selected evaluations? How are the participatory approaches defined and described?
If yes, do these seem to have had any bearing on attention to gender equality and women's empowerment?
If yes, please describe how, and/or provide examples in connection with the following (participation of partner country evaluators; participation of local-level stakeholders in evaluations; consultation with local groups;

consultation with women's groups and/or groups that work with issues of gender equality and women's empowerment)

e) Can any specific observations be noted about substantive results and impact in the field in terms of progress towards gender equality and women's empowerment as presented in the selected evaluation reports? If yes, please provide at least one example of Good Practice in terms of projects demonstrating positive benefits and impact in terms of gender equality and women's empowerment as demonstrated through evaluation, by submitting evaluation reports, and by briefly describing the relevant intervention(s).

f) Are monitoring/performance indicators and evaluation criteria in the selected evaluation reports gender sensitive?

g) Can any other changes be noted in agency evaluation reports with respect to gender equality and women's empowerment since the 1993/94 DAC Assessment?

B. Good approaches to gender equality in evaluations

The Consultants are to summarize and give a presentation of examples of Good Practice about what seems to have worked well in terms of providing good assessments of gender equality and women's empowerment in evaluation reports, both in connection with evaluation preparation as well as in approaches and methodology.

The examples of Good Practice are to include a specific comment for each example on what makes it fall in to the category of Good Practice. The examples are to be presented in such a way that they may be used at training sessions. They are to be compiled in a special appendix to the report.

The study will also include a discussion, using the above information, on what could be identified as some important factors in a good evaluation approach to gender equality and women's empowerment in evaluations.

4 METHODOLOGY, EVALUATION TEAM AND TIME SCHEDULE

The Consultants are to work in close collaboration with Sida's Department for Evaluation and Internal Audit and Policy Secretariat. A reference group consisting of representatives from the two departments as well as a representative from the Department for Social Anthropology at Stockholm University will hold meetings at least two to three times during the assignment.

The Consultants will start by presenting a tentative methodological approach/methods for the assignment, including selection criteria for the sample of evaluation reports to be assessed. The assignment will build on a sample of evaluation reports written during the years 1995-97. The Department for Evaluation and Internal Audit will supply the Consultant with the reports. The criteria or rating system(s) forming the bases for the Consultants' assessments are to be clearly presented in the draft report.

Some issues in the DAC questionnaire and in the section on Good Practice may require more detailed information than what is provided in the evaluation reports. In such cases the Consultant is to carry out interviews with evaluation consultants and/or Sida personnel to obtain more information. Methods and interview questions should be described/attached to the draft report.

Questions 16 and 17 g in the DAC questionnaire require the Consultants to compare the results from their own assessment with the results from the studies prepared by SIDA for DAC's 1993/94 assessment (Annex 2 and 3). This is to be done where a comparison may be possible, i.e. where the 1993/94 SIDA studies use similar categorization as used in the questionnaire. Possible methodological problems with the comparison are to be discussed in the report. An important factor influencing the comparative analysis is the fact that in May 1996, the Swedish parliament endorsed the promotion of equality between women and men in partner countries as one of the overall goals of Swedish development cooperation.

5 REPORTING

The Consultants will prepare an inception report that presents a tentative outline for the report. The inception report is also to include a methodological approach/methods for the assignment and selection criteria for the sample of evaluation reports to be assessed. The inception report is to be presented at a meeting 28 September 1998.

The evaluation report shall be written in the English language and should not exceed 20 pages, excluding annexes. Format and outline of the report shall, where appropriate, follow the guidelines in **Sida Evaluation Report - a Standardized Format** (see Annex 4). Answers to the DAC questionnaire are to be presented to Sida no later than 26 October 1998. Three copies of the draft report shall be submitted to Sida no later than 27 November 1998. Within 2 weeks after receiving Sida's comments on the draft report, a final version in 3 copies and on diskette shall be submitted to Sida. Subject to decision by Sida, the report will be published and distributed as a publication within the Sida Evaluations series. The evaluation report shall be written in Word 6.0 for Windows (or in a

compatible format) and should be presented in a way that enables publication without further editing.

The evaluation assignment includes the production of a Newsletter summary following the guidelines in **Sida Evaluations Newsletter – Guidelines for Evaluation Managers and Consultants** (Annex5) and also the completion of **Sida Evaluations Data Work Sheet** (Annex 6). The separate summary and a completed Data Work Sheet shall be submitted to Sida along with the final report.

Annex 2: List of References

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- Woroniuk, B., *Gender Equality Experience and Results Analysis Exercise, Synthesis Report*, Sida, 1996

Annex 3: List of Evaluations Included in the Review

- 97/1 Swedish Consultancy Trust Funds with the ADB, Operating Efficiency and Effects
- 97/4 Environment & Land Management Sector Activities, SADC
- 97/6 Sida's Support to the Start East Programme
- 97/13 The Advancement of Librarianship in the Third World (ALP), A core programme of the International Federation of Library Associations and Institutions
- 97/14 Science Research in Zimbabwe, SAREC Support for Research Capacity Building
- 97/17 Pahal Project Rajasthan, India, Participatory approach to human and land resource development
- 97/18 AMS and AMU Projects in the Russian Federation 1994-1996
- 97/19 Mapping for Economic Development, Satellite imagery and computerised cadastral support systems in the Philippines
- 97/20 AMS and AMU Technical Assistance Projects in Poland 1994-1995
- 97/21 UNICEF's Child Rights Programmes in Latin America
- 97/23 Development Co-operation between Guinea-Bissau and Sweden, macroeconomic development, structural reform and project performance
- 97/24 Swedish Support to Tanzania's Power Sector
- 97/25 Swedish Contribution to the Conkan Railway Construction Project in India
- 97/26 Servicio Universitario Mundial (WUS) en América Latina, Programa de becas para refugiados
- 97/27 The Swedish Committee for Afghanistan, A joint EC-Sida evaluation of support to the health and education sector programmes
- 97/28 Swedish Support for Gender Equality in Chile
- 97/30 Programas do Ensino Superior Apoiados pela Asdi em Mocambique
- 97/31 Swedish Support to Social Sciences Research Centres in Central America 1992-1995
- 97/32 Diakonias arbete för mänskliga rättigheter och demokrati i Sydamerika
- 97/33 Estatísticas Educacionais e Informatização no Ministério da Educação de Mocambique
- 97/35 Swedish Labour Market Projects in Latvia 1994-1996
- 97/37 Energy, Environment and Development Programme of the Stockholm Environment Institute
- 97/38 Biotechnology Research Projects, Tree tissue Culture and Proteins/Enzymes as biosensors
- 97/39 Sida Support to World University Service - South Africa (WUS-SA) 1993-1996
- 97/40 Swedish Labour Market Projects in Estonia 1994-1997
- 98/1 Sida Support to Telecom in Southern Africa
- 98/2 Sida Support to the Banking Sector in Vietnam
- 98/3 Swedish Labour Market Projects in Lithuania 1995-1997
- 98/4 Den mänskliga faktorn, Samarbete mellan svenskt postväsende och den regionala posten i St Petersburg, Ryssland
- 98/5 Apoyo de Asdi al Programa Nacional de la Mujer en Bolivia
- 98/6 Sustainability and Partnership, Sida supported cooperation between Swedish and Baltic NGOs
- 98/7 Sewerage and Water Sector Projects in Egypt
- 98/8 Sida Support to ten Projects at the Geological Surveys of Estonia, Latvia and Lithuania
- 98/10 Swedish Support to the Power Sector in Vietnam
- 98/11 Public Auditing in Southern Africa
- 98/12 The Asian Regional Research Programme in Energy, Environment and Climate
- 98/13 Selected Aspects on the University System of Nicaragua
- 98/14 Expanded Programme on Immunization in Zimbabwe
- 98/15 Community-based Rehabilitation Programme in Zimbabwe
- 98/16 SAREC Supported Dryland Research Programmes in East Africa
- 98/17 Environment-friendly District Heating in China, Five Investment Projects Supported by Concessionary Credits from Sweden
- 98/18 Sida Supported Projects in Thailand 1986-1998, Contract Financed Technical Assistance and Concessionary Credits in Energy, Environment, Transport, Public Administration and Finance

Annex 4: Format for analysis of evaluation reports and aggregate data

1. Number and title of the evaluation	TOTAL	
<i>The intervention:</i>		
2. Date of final report		
3. Time period evaluated		
4. Cost for the period evaluated (MSK)		
5. Channel	Bilateral	35
	Multilateral	2
	NGO	5
6. Type of support	Project	34
	Sector	5
	Programme aid	3
7. Sector (according to work sheet)	Social	14
	Infrastructure	8
	Economic sectors	7
	Public administration	7
	Disaster relief	1
	Multi-sector	5
8. Sector (as classified 1992)	Social infrastructure and services	13
	Health	1
	Water supply and sanitation	1
	Public administration	7
	Development planning services	1
	Transportation and navigation	1
	Communications	2
	River development	0
	Energy	5
	Agriculture	0
	Industry, mining and construction	1
	Multisector	8
	Programme assistance	0
	Technical assistance	2
9. Objective in terms of gender equality (as stated in the evaluation)	Primary objective	2
	Secondary objective, or one of several objectives	9
	No objective	14
	n.i.	17
10. Likely impact on gender equality (given basic information about the project)	No or very limited impact on gender equality	8
	Some impact on gender equality	28
	Major impact on gender equality	6
11. Nature of impact		
12. Gender analysis	<i>No attention paid to gender in project preparation</i>	
	<i>Gender briefly adressed during project preparation</i>	
	<i>Thorough gender analysis carried out during project prep.</i>	
13. Performance indicators and monitoring information	<i>There were gender sensitive indicators & monitoring info.</i>	
	<i>There were indicators & monitoring info. but not gender sensitive</i>	
	<i>There were no indicators or monitoring info. at all</i>	

<i>Evaluation preparation</i>		
14. Cost of the evaluation (SEK)		
15. No. of person weeks for the assignment		
16. Responsible Sida department	Regional dept.	6
	Sida Öst	8
	SAREC	7
	DESO	7
	INEC	10
	NATUR	2
	SEKA	2
	UTV	0
17. Timing	Mid-term	15
	Completion	18
	Ex-post	3
	Not applicable	5
	n.i.	1
18. Type of evaluation	Project	27
	Programme	9
	Sector	2
	Country	2
	Programme aid	0
	Thematic	1
	Organisational	1
	Other	0
	n.i.	0
19. Purpose of the evaluation (One or more alternatives)	Accountability	16
	Management	29
	Knowledge	10
	n.i.	10
20. Importance given to gender equality in the evaluation as stated in ToR	Not mentioned at all	16
	Mentioned	26
21. Place in ToR where gender was mentioned (one or more alternatives)	Background	3
	Purpose and scope	4
	The assignment/Issues to be covered in the evaluation	23
	Methodology	1
	Evaluation team	5
	Reporting	0
	Not relevant (gender not mentioned)	16
	n.i.	
22. References with respect to gender (One or more alternatives)	Reference given to gender objectives in project	6
	Reference is made to Swedish development objectives/policy	3
	Reference reference to the target group	0
	Gender is mentioned in connection with evaluation criteria	3
	Reference given to particular questions or issues	5
	Gender mentioned without any particular reference	9
	Not relevant (gender not mentioned)	16

23. Briefing by Sida officer	<i>Did not discuss gender with consultants</i>	
	<i>Had some discussion on gender with consultant</i>	
	<i>Emphasised the importance of gender</i>	
24. Gender specialist was included in team	Yes	3
	No	31
	n.i.	8
25. The team included both men and women	Yes	22
	No	20
	n.i.	0
26. The team included member(s) from the country	Yes	14
	No	27
	n.i.	1
27. Consultants had previous experience of gender analysis	Yes	
	No	
	n.i.	
28. Consultants had participated in Sida's or other gender training	Yes	
	No	
	n.i.	
<u><i>The evaluation process</i></u>		
29. Contact with key persons in the intervention	Yes	
	No	
	n.i.	
30. Contact with representatives of target groups	Yes	
	No	
	n.i.	
31. Active participation in evaluation by local stakeholders	Yes	
	No	
	n.i.	
32. Contact with agency working with gender issues	Yes	
	No	
	n.i.	
33. Gender specific data was collected	Yes	
	No	
	n.i.	

<i>The evaluation report</i>		
34. Gender equality aspects included, according to Sida work sheet	Yes	31
	No	9
	n.i.	2
35. Weight given to gender in evaluation	Not mentioned at all	14
	Not included, with reason given for why not	1
	Briefly mentioned	7
	Some discussion	16
	Discussed in depth	4
36. Perspective	Women	14
	Men and women	11
	Gender equality	2
	Not relevant (gender not included)	15
37. Level of analysis (one or more alternatives)	Presents data/information on gender	22
	Draws conclusions on gender	19
	Gives recommendation on gender	14
	Not relevant (gender not included)	15
38 Follow-up level (one or more alternatives)	National context and problems	9
	Intentions (project objectives etc.)	14
	Processes (activities)	19
	Results (output and outcome)	12
	Not relevant (gender not included)	15
39. Gender is discussed as a matter of (one or more alternatives)	Relevance	5
	Fulfilment of objectives	10
	Side effects	18
	Cost-effectiveness	0
	Sustainability	3
	Not relevant (gender not included)	15
40. Target group discussion	With consideration to gender	11
	Without consideration to gender	18
	None	13
41. Presentation in the report	There is a separate section on gender	16
	Discussion on gender is integrated throughout the report	11
	Not relevant (gender not included)	16
42. Sex disaggregated statistics and figures	Disaggregated figure and statistics at target group/context level	7
	Disaggregated figures and statistics at process level	5
	Disaggregated figures and statistics at result level	3
	Only aggregate statistics (men and women) at any of levels above	14
	No statistics (on people) on any of the above levels	15

Annex 5: Positive impact in terms of gender equality

Sida Evaluation 98/5

Apoyo de Asdi al Programa Nacional de la Mujer en Bolivia

Marina Subirats
Åsa Westermark

Department for Latin America

I. RESUMEN EJECUTIVO

Antecedentes del Programa Nacional de la Mujer (Subsecretaría de Asuntos de Género)

La Subsecretaría de Asuntos de Género fue creada en 1993 como mecanismo de impulso a las políticas de género, dentro del gobierno boliviano. La acción de las mujeres feministas, el apoyo de la cooperación extranjera, y en particular de Asdi, y el contexto de reformas políticas iniciadas en aquel momento por el gobierno del MNR, que consideró que era la ocasión para introducir una segunda oleada de reformas democráticas en el país, contribuyeron al nacimiento de esta institución, que creó una dinámica totalmente distinta a la que la había precedido, la ONAMFA, de corte asistencialista..

La Ley núm. 1493 de Reforma del Estado dispuso una nueva estructura administrativa del Poder Ejecutivo y mediante el Decreto Supremo Núm. 23.669 creó la Secretaría Nacional de Asuntos Etnicos, de Género y Generacionales en el Ministerio de Desarrollo Humano; de esta Secretaría dependía la Subsecretaría de Asuntos de Género.

La misión de la SAG era la de desarrollar las políticas de género en diversas direcciones. Darles visibilidad en el contexto boliviano, operar la transversalidad en los diversos Ministerios y sectores, conducir los cambios legales necesarios, capacitar y sensibilizar al funcionariado y a la población y potenciar el acceso de las mujeres a puestos de responsabilidad. En el marco de una política de descentralización y democratización, planteada por el gobierno del MNR, la SAG tenía también como misión llevar a cabo la descentralización de los organismos de género, y dotar a las Prefecturas y Municipios de los instrumentos para ejecutar las políticas acordadas.

En este contexto, dos convenios fueron firmados por la cooperación bilateral de Suecia a Bolivia, en 1993 y 1994. Estos convenios contemplaban, para el periodo 1993-97, los aportes financieros de SEK 1.250.000 para la puesta en marcha y de 25.000.000 para la implementación. Esta fue la principal fuente de financiamiento del Programa de la Mujer en sus inicios. Posteriormente, los convenios han sido

extendidos dos veces por acuerdos específicos del 14 de enero de 1997 por seis meses sin fondos adicionales y del 19 de agosto de 1997 por cinco meses sin fondos adicionales. Para noviembre de 1997 están previstas las negociaciones bilaterales entre los gobiernos sueco y boliviano para estudiar la viabilidad de un nuevo convenio.

La actuación de la AG dio lugar a dos informes de evaluación encargados por Asdi para efectuar el seguimiento de los acuerdos adoptados por ambos gobiernos, y una serie de recomendaciones permitieron ir rectificando algunos aspectos en la implementación de las políticas de género. Recientemente se han producido cambios importantes que abren nuevas perspectivas: las elecciones de julio de 1997 supusieron un cambio de mayoría política y la constitución de un nuevo gobierno, a principios de agosto, liderado por el ADN. Este cambio de liderazgo político ha supuesto también una remodelación de la Administración, de modo que la ubicación institucional del mecanismo impulsor de las políticas de género ha variado. Se ha creado el Ministerio de Desarrollo Sostenible y Planificación, y, como parte de él, el Vice-Ministerio de Asuntos de Género, Generacionales y Familia. La antigua Subsecretaría de Asuntos de Género pasa ahora a ocupar el rango de Dirección General, y mantiene la denominación de Asuntos de Género (DGAG). Este organismo se encuentra, en el momento de la realización de esta misión, en plena reestructuración de sus políticas y de su funcionamiento.

Objetivos de la misión

La segunda evaluación al Programa Nacional de la Mujer boliviano tuvo lugar en junio de 1996, y abarcó, fundamentalmente, las actividades desarrolladas hasta finales de 1995. Los objetivos de la misión actual, fijados en los términos de referencia, han sido básicamente la evaluación de las acciones realizadas y el impacto causado en la sociedad durante 1996 y hasta julio de 1997, momento en que se produce el relevo gubernamental. Para ello se han analizado los programas y acciones llevados a cabo en relación a la participación popular y fortalecimiento institucional, las áreas de violencia y servicios legales, las de justicia y reformas legales, los ámbitos relativos a la educación y a la investigación, los avances en las políticas laborales, en las de salud y en comunicación y capacitación. Finalmente se han examinado los logros y dificultades en las grandes líneas emprendidas: empoderamiento de las mujeres y relación con partidos políticos, descentralización, transversalidad y funcionamiento de la SAG, tanto desde el punto de vista interno como en relación a sus funciones y líneas ideológicas y a su financiamiento y relación con donantes.

Con todo, y dado que con el cambio de gobierno concluye una etapa, se han emitido algunos juicios relativos a lo que ha significado el conjunto de la labor de esta institución desde su creación en 1993.

Metodología de la evaluación

La misión estuvo compuesta por dos personas, y tuvo una duración de 13 días en Bolivia.

El trabajo realizado ha consistido en la lectura y análisis de los documentos relativos a planificación, los acuerdos firmados con la cooperación sueca, los dos informes de evaluación anteriores y cuanta documentación nos ha sido facilitada por la DGAG; se han realizado 29 entrevistas en La Paz con responsables de la antigua SAG, responsables políticos del gobierno anterior y del actual, dirigentes de la actual DGAG, mujeres pertenecientes a ONGs, dirigentes políticas, etc. Se ha realizado también una visita a Sucre y otra a Potosí, para conocer el funcionamiento de las Unidades de Género, las Brigadas de protección de la mujer y la familia y los servicios legales integrales. En estas visitas 23 personas han sido entrevistadas. Se ha intentado encontrar contrastación estadística para evaluar el impacto de las políticas de género en Bolivia, pero los registros estadísticos no permiten comparaciones en el tiempo para poder apreciar si los avances son ya detectables en términos numéricos.

Conclusiones y recomendaciones generales

Analizados estos diversos materiales, las conclusiones obtenidas son las siguientes:

La SAG ha sido un organismo creado hace sólo cuatro años, y por lo tanto este es un tiempo muy corto para lograr la plena implementación de las políticas de género. Sin embargo, ha trabajado de una manera excelente si tenemos en cuenta la dificultad de las tareas encomendadas, su novedad en el contexto boliviano y los recursos humanos y materiales de que ha dispuesto. En este sentido hay que valorar como altamente positiva la trayectoria del organismo y los logros alcanzados en sólo cuatro años, y especialmente en el periodo evaluado, que podemos enumerar brevemente como:

El primer logro es la creación y consolidación misma del organismo, y su visibilidad a nivel nacional y local. Está totalmente en la línea de las recomendaciones de Beijing.

Se ha conseguido también visibilizar la problemática de género a nivel de toda la sociedad, como una problemática específica que necesita un tratamiento determinado y no se resuelve solo con medidas sociales generales.

En el periodo 96-97, se ha dado por finalizado el Plan anterior, que inicialmente abarcaba también 1997, y se ha diseñado un nuevo Plan quinquenal de Igualdad de Oportunidades 1997-2001, siguiendo las directrices de Beijing.

Se ha completado la red de centros a nivel departamental y municipal, con unidades de género capaces de ejecutar una variedad de programas y servicios legales integrales en muchos municipios, que son embriones para el desarrollo de prestación de servicios de género al nivel municipal, y se ha comenzado el proceso de transferencia de estos centros a los organismos de la administración local.

Se ha avanzado en las reformas legales, especialmente con la aprobación de la Ley de Cuotas, que, si bien no ha dado los frutos esperados, constituye un buen precedente para las políticas de acción positiva.

Se ha avanzado en la lucha contra la violencia doméstica, completando la creación de brigadas policiales y expandiendo el tema de la violencia a programas de salud y de educación.

Se ha avanzado en el diseño e implementación de políticas de género en educación, trabajo y salud, entrando en contacto con los Ministerios responsables de estos sectores, sensibilizando a parte de su personal y comenzando a lograr un diálogo para la transversabilidad, hasta el punto de conseguir ya algunos programas comunes.

Se han fortalecido los contactos con mujeres notables, tanto pertenecientes a partidos políticos como a diversos grupos profesionales, y también con asociaciones de mujeres a todos los niveles, y se ha impulsado el asociacionismo y la construcción de redes.

Se ha realizado un enorme trabajo de sensibilización y capacitación, así como la publicación y difusión de materiales adecuados para ellas en diversos ámbitos de la vida social.

Se ha preparado el camino para el seguimiento del cumplimiento de la recomendaciones de Beijing, a través de la construcción de una plataforma en la que participan muy diversos actores sociales.

Todo ello constituye un balance extraordinariamente positivo, si tenemos en cuenta que estamos refiriéndonos a un periodo de año y medio, aproximadamente, y a un organismo que ha tenido poco apoyo político y escasos medios tanto humanos como de infraestructura. En este sentido, el gran trabajo realizado muestra ser fruto de un fuerte compromiso personal de muchas de las personas que lo llevaron a cabo, más allá de las posibilidades políticas y materiales con que contaban y con un nivel de rendimiento que sobrepasa las habituales exigencias profesionales.

Las deficiencias observadas, que se refieren sobre todo a si no hubiera sido posible avanzar aun más, son menos achacables a la SAG que a dificultades generales de la administración boliviana, por una parte -falta de definición de una carrera en el servicio civil, falta de organismos adecuados a la transversalidad-, a la falta de

apoyos políticos suficientes, por otra -el antiguo secretario del que dependía la SAG tendió a retrasar las decisiones, en lugar de impulsarlas-, a la reorganización de la administración a nivel departamental, que se halla aun en un proceso de construcción bajo una forma democrática, de mayor participación popular a nivel local, y a las resistencias de los Ministerios y del conjunto de la sociedad, finalmente, propias de todo proceso de cambio y especialmente notorias en el tema de género. Así, hay que subrayar que los incumplimientos que se observan en relación a los acuerdos con ASDI no se refieren a las partes que la SAG debía llevar a cabo, que efectivamente se cumplieron en su casi totalidad, sino a la partes que dependían de otros organismos, como el servicio civil o las Prefecturas y Municipalidades, que sólo muy parcialmente realizaron los cambios acordados.

.En relación a la etapa actual, consideramos que el nuevo equipo hereda una situación muy favorable para llevar a cabo las tareas encomendadas: existe un Plan hecho teniendo en cuenta las directrices de Beijing, una red institucional, un personal preparado, una legitimidad del tema. Resumiremos las recomendaciones realizadas para tratar de sacar el máximo de provecho a la herencia recibida.

Como línea absolutamente prioritaria dentro del trabajo del organismo de género, sería deseable proceder a la institucionalización, tanto de los servicios y oficinas departamentales y municipales como de los contactos transversales con los Ministerios y sectores. Hay que insistir en que en organismos muy nuevos en la administración, gran parte del trabajo realizado puede perderse si no se institucionaliza, cuando cambian las personas responsables. Las políticas de género deben ser políticas de Estado, y por tanto independientes de los partidos políticos y las personas que las dirigen temporalmente, como ocurre con la educación o la salud, aunque cada partido imprima sus prioridades a tales políticas.

En segundo lugar, la experiencia muestra la necesidad de consolidar el apoyo de las mujeres, dado que la política de género debe tender a ser interclasista y apartidaria, y sostenerse sobre la base de la solidaridad de todas las mujeres; este proceso está en marcha, pero habría que reforzarlo e institucionalizarlo. En una fase más avanzada del desarrollo igualitario de hombres y mujeres pueden instalarse los mecanismos necesarios para que éstos sean también solidarios no por altruismo sino por conveniencia propia, pero en esta fase ello es menos prioritario.

Desde el punto de vista del discurso, sugerimos orientarlo en dos direcciones: igualdad de oportunidades, que es más claro que equidad y más amplio, dado que es aplicable también a otras diferencias sociales y en esta fase es mejor que ciudadanía, término menos claro en sus contenidos; y empoderamiento de las mujeres, que juega a favor de su visibilidad en todos los planos. Rebajar, en cambio, el énfasis verbal sobre la violencia, aun cuando siga la lucha efectiva contra ella.

Desde el punto de vista de las líneas a priorizar, recomendamos centrar la acción en la educación, como un gran esfuerzo nacional, que es a la vez la forma más efectiva de lucha contra la pobreza a medio plazo. La educación podría convertirse en la tarea emblemática del Vice-Ministerio de Asuntos de Género, Generacionales y Familia, dado que la concentración de esfuerzos y sobre todo de imagen daría más fuerza a este organismo. Ello no excluye seguir trabajando en otros campos necesarios, como el acceso al empleo y a la autoocupación, la salud, etc. además de participación, reformas legales y violencia, y seguir manteniendo el altavoz de los medios de comunicación.

Sería también conveniente reestructurar la DGAG, dándole una estructura más estable, consolidar a su personal y mantener al máximo posible toda la experiencia adquirida, conservando a las personas que la han llevado a cabo y utilizando sus conocimientos. Es importante que se sientan partícipes de una tarea de gran alcance, que sepan que se cuenta con ellas, que no están realizando una tarea burocrática.

Finalmente hay que poner en marcha sistemas de evaluación internos, consiguiendo la normalización de la información estadística, como primera medida para poder seguir la evolución de los cambios, y formulando buenos sistemas de indicadores específicos, basados en datos obtenidos en forma sistemática que permitan seguir bien las coyunturas y pilotar los cambios necesarios en cada etapa en función de resultados.

Pahal Project - India

Participatory approach to human and
land resource development

P Bharati
M E S Flint
M K Shah
T F Shaxson

Department for Natural
Resources and the
Environment

local level; c) skills development; and d) resources controlled and generated by the village institution. While most of the resources, including financial, are being controlled by the people and the VLCs, and there is a gradual transfer of skills to the village functionaries, two features of the project continue to constrain participation. The first feature is the high level of subsidies. As long as people are paid to participate, there is no guarantee that the activities undertaken will be appropriate and acceptable to farmers. High subsidies also perpetuate a dependence on government 'handouts', and undermine people's incentives to take the initiative or to become more self-reliant. The second feature is the limited and pre-determined menu of activities and technologies mentioned above (4.18). This will clearly be difficult to change as long as such high employment subsidies are associated with certain activities.

4.23 The other constraint to participation is the limited development of functional village institutions. The PoAs mention the need for strong VLOs, but most of the efforts so far have been focused on developing strong VLCs. VLCs (and VLMs before them) have been effective in mobilising people to participate in the pre-determined activities. However, this is again a rather narrow view of participation. More needs to be done to strengthen the VLOs so that they are able to take control of the decision making processes. Decision making by the VLOs needs to go beyond preparing lists of households willing to take part in an activity, and should cover all aspects of planning, design of the programme, its implementation and monitoring. Decision making at the village level at present seems externally induced rather than internally developed.

4.24 In order to facilitate an incremental process of participatory development, some incentives for participation and effectiveness need to be built into the programmes. At present PAHAL provides support uniformly across the board, largely regardless of the quality of participation and results. This can be counter-productive. Some classification of VLOs, on the basis of types and levels of people's participation, and on the quality of previous work, could be used to determine the level of project support made available.

Social and gender strategies

4.25 The results of the emphasis on women's involvement in the project are impressive. The combination of women's awareness camps, an insistence on some women VLC members, and the inclusion of women participants in all training programmes and meetings, have led to a definite active presence of women in the project. The emphasis placed on gender by the resident adviser has been an important factor.

4.26 The evaluators did not gain a consistent picture of the type and coverage of gender training for staff. The PoAs state that gender issues at the village level should be dealt with by the women staff members. While such a strategy helps in reaching out to the women in the villages, it creates a divide among the staff on the basis of who should be dealing with gender issues. In order to institutionalise gender sensitive planning and programme implementation, all the staff members, women and men, should be provided with gender training. Male staff members may not find it easy to deal with issues related to women, but this does not remove the need for them to be gender sensitive in their approach. This will need to be carefully handled. The gender training provided earlier in the project was not well received by either government or NGO staff.

4.27 Providing all the project assistance in women's names has increased the confidence of women. However, this may well be a short term effect unless women are enabled to build productive assets which they can own themselves. A start has been made in this respect by providing fruit trees (under the Panchtaru programme) and heifers in the women's names.

4.28 Although there has been a continuous and sustained focus on the involvement of women in the project, a similar social strategy seems to be lacking in the project. So far, the social strategy seems to be limited to the selection of largely tribal villages. The underlying assumption is that by selecting a tribal village, the project is in effect working with the poorest community in the District. While this is true in general, such a strategy assumes that the tribal community is a homogeneous group.

4.29 In reality, even apparently homogeneous tribal communities have divisions, mainly on the basis of the resource endowments of different households. The evaluation team found no cases where a special and systematic effort had been made by the project to identify the most vulnerable groups within the tribal villages, or to focus special efforts towards them. Some project staff were not aware that the revised PoA intended the project to reach and actively involve "the weakest and most disadvantaged segments of the population". The evaluators did, however, come across a few cases where poorer households had been deliberately selected. This supports the project view that some VLC members are aware of the poverty dimension, even if the project as a whole does not, as originally intended, have a particular poverty focus.

4.30 That said, the project has been inclusive rather than exclusive. The evaluators found no evidence of poorer households being left out of the project activities or of any negative impact on them so far. However, in the absence of any systematic social monitoring of the project activities, it is

not possible to identify what, if any, differences in impact exist between different categories of households. Project staff agreed that this was a deficiency which would need to be rectified in any new M&E system.

4.31 The evaluators were not able to verify the extent to which project activities had been "concentrated to villages that are more economically backward and ecologically hard pressed". The fact that the villages selected are predominantly tribal would suggest that the project has been concentrated in poorer areas of the District, and no anomalous examples were seen. However, it is not clear exactly how the village selection process was conducted in each Block, particularly in the early stages, nor does the project have data which would verify that the project is in fact working in the poorest villages in the District. There would be merit in ensuring that any future village selection process was demonstrably systematic and rigorous.

Natural resources activities

4.32 The methods for establishing forestry plantations, and for implementing soil & water conservation works are clearly detailed in instruction manuals, and are technically sound. The technical staff at SMS level also have the training, experience and necessary skills to put the standard recommendations into practice, and to supervise others.

4.33 The SWC guidance appears to have been followed to a good standard by technical staff in most cases. However, with devolution of responsibilities down to VLC/VLO level and the massive increase in SWC works in the past year, keeping up standards of both layout and future maintenance has become much more difficult. Project staff are no longer in a position to dictate the technical standards which must be achieved, but can only advise. Observations made by the evaluators suggest that this has resulted in some SWC work which is unnecessary and/or of dubious value (see 6.13 and D.12).

4.34 The quality and utility of the Micro-Level Plans (MLPs) produced during the early years of the project is variable. The few MLPs seen by the evaluators do not appear to have been plans in the proper sense of the word. Most appeared to consist of a list of all the households in the village together with the area of SWC works, PLP, etc. 'required'. There was no budget, no phasing, and no prioritisation. However, the abandonment of the formality of producing a MLP by a village has possibly diminished the chances of effective integrated long-range physical planning of future uses and management of a village area as a whole. There is no longer a requirement to assess and map the varied land resource conditions as a basis for environmentally-sound land use planning. There is a need to reintroduce an informed local

households were not able to carry out the bunding work on their fields themselves, poorer people from the village provided their labour and received the wages. While this increased the availability of employment opportunities for the poorer people, they also ended up indirectly paying the 25% labour contribution for the better-off people. This is not seen as a negative feature by the people, since wages available were anyway much higher than they could have obtained elsewhere. However, it raises questions about ownership of the activities carried out and the rationale behind 'contributions' that do not necessarily come from the households benefiting from the activities.⁵ Several better-off households were effectively able to treat their fields for free.

6.25 Although short term benefits from the SWC activities are significant, there is no strategy for sustaining the impact over the long run. Even the drop in seasonal migration may well be a short term impact, and will only last while PAHAL continues to create wage employment opportunities in the village. Once the physical works are over, many households may have no option but to revert to migratory employment. Steady state migration patterns can only be judged after some years. Without the necessary focus on agricultural activities, the potential for spontaneous increases in crop productivity is limited.

6.26 It was unfortunate that the project was not able to use the opportunity provided by the large scale physical activities and the high level of cash subsidy being pumped into the villages. Had the subsidy been used more innovatively, it might have been used to create a savings base in the village. This could then have been used by the people for productive investments in the future.

6.27 The efforts at increasing the involvement of women at all levels has had significant impact in the project villages. Women are far more visible, specially in public fora, than they would have been before the project started. Their participation in training programmes, awareness camps and meetings has provided the women with access to information, and in some cases the technical skills, for implementing the project activities. In several villages, men commented that most men do not now object to women from their households taking part in project activities. Some women felt that their status within the household has increased now they are able to earn a cash income. It is difficult to comment on whether the prevailing gender relations in the villages have undergone a change as a result of these changes. The project will have to

Sida had been assured after the 1995 Annual Review that this no longer happened, and that better off farmers had to work on their own land without labourers.

continue with its focus on the special needs of the women in order to engender long term change.

Some of the Evaluation Team members were having a meeting with the PAHAL Block level team in Dungarpur Block when there was a loud noise heard outside the room. An angry group of about thirty women marched into the room and were shouting at the top of their voices. When some of the team members tried to ask them to meet outside the room, they refused and insisted that they wanted to be heard inside the room and by none less than the PO. It took some time before they calmed down a bit and explained the reason for their visit and their anger. They were not happy with the measurements of the field bunds they had constructed and felt that they were being paid less than what they should be rightfully paid. They exclaimed loudly that they would only accept the 'correct' payment and would not settle for anything less. This delegation of village women was accompanied by about six to seven men, as we realised later, who sat quietly outside the room smoking their *beedis*, while the women carried out all the negotiations.

Financial and economic impact

6.28 It is important to distinguish between the financial impacts and profitability from point of view of households, and economic impacts from the point of view of society. In financial terms, the project has been highly beneficial to households because of the local wage employment created. Average resource transfers amount to almost Rs. 7 lakhs per village over the life of project.

6.29 Similarly, the financial profitability of most of the project investments is also assured from the point of view of households. Households have either borne almost no cost, and/or have received large capital and recurrent subsidies. Any level of income will therefore make the investments highly profitable. With almost all the costs borne by the project, the financial rate of return for households is extremely high.

6.30 The economic profitability and impact is more difficult to judge, but is also more questionable. The major investment of the project has been in soil and water conservation (Rs. 540 lakhs; SEK 10.8 million). There is reason to believe that the unit costs of SWC costs are higher, and the economic benefits lower, than assumed by the project.

6.31 There is uncertainty over the total length of new bunds constructed^f. Actual costs per hectare may therefore be

On the assumption that 85% of the SWC was for field bunding (Rs 459 lakhs), a total of 3,825 kilometres of new bunds should have been constructed (@ Rs 12 per running metre). Layout has varied, so it is not possible to estimate accurately what this means in terms of area treated. If 300 metres of contour

Swedish Support for Gender Equality in Chile

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EXECUTIVE SUMMARY

J. *The Program*

The National Women's Service, SERNAM, was created by law in January, 1991 with the aim of promoting equal rights between men and women. It is widely acknowledged that the decision to create SERNAM was made in recognition of the strategic role that women played in the human rights movement during the military government, and in the transition to democracy. SERNAM is unusual for being one of the few, if not the only, Governmental Women's Institutions in Latin America whose creation has been approved by a parliamentary act.

In Sweden, discussions on support to women in Chile started in 1990, even before the Chilean elections. Given the context of the transition process into a stable democracy, the timing was considered particularly appropriate for a proposal on long-term support to SERNAM, the Chilean National Service for Women, and to national NGOs active in the area of gender equality, many of which had formerly received support from Sida from the framework of Support for Human Rights. Sweden has played a decisive role in supporting both the efforts of the Chilean government as well as civil society to incorporate gender equality into public policy and to strengthen the position of women in Chilean society.

The explicit goal of Sida's support to SERNAM is to contribute to the democratization process in Chile. When Sida's overall support for the transition to democracy was negotiated and decided upon, Sida emphasized that gender equality constitutes an important basis for the development of democracy. Areas for support were chosen strategically for their potential, both to support the institutional consolidation of SERNAM, the implementation of the Equal Opportunity Plan, which is the government's blueprint for supporting gender equality in public policy, as well as to create a favorable climate within Chilean society for strategic changes regarding gender equality.

Sweden has provided approximately 60 MSEK in support for this goal, through two consecutive periods of cooperation, from 1990-1993 and 1994-1997. The support was given with the aim of contributing to the creation of initial conditions for developing strategies to promote gender equality, and to establish and consolidate programs which would subsequently be maintained by the Chilean Government.

The main role of SERNAM is:

- to formulate public policies which will ensure equal opportunities for women in all spheres of political, social and economic life;
- to integrate the defense of women's rights into national, regional and local public policies;
- to create proposals for constitutional changes that will ensure legal equality for women and men.

The Specific Agreement for the Second Period of cooperation was signed in February 1995. The total amount of the Program Support for this period is 29 MSEK. The main components and the objectives of the program, entitled "Support for Structural Changes Aiming at Equal Opportunities for Women and Men in Chile, 1995-1997", are as follows:

Institutional Support to SERNAM

- Support to three *Women's Information Centers (CIDEM)* in Talca, Valparaiso and Santiago, has the aim of informing women regarding their rights and to promote increased self esteem and autonomy among women, so that they may participate fully in the national development process, in equal conditions with respect to men.
- Support for the development of a unified **Communication Strategy**, with the aim of creating public support for the Equal Opportunity Plan through public information campaigns, publications and media activities.
- Support for *Sectorial Work*, with the goal of encouraging ministries, authorities and other governmental institutions to develop and implement public policies favoring equal opportunities for women and men in areas prioritized by the Equal Opportunity Plan, such as politics, economy, culture and family.
- Support for *Training Activities*, both within SERNAM, as well as in the public sector, in order to improve the dissemination and implementation of the Equal Opportunity Plan

Fund for Support to Civil Society:

This Fund was created primarily in order to strengthen the participation of civil society in the implementation of the Equal Opportunity Plan, as well as to contribute to the consolidation of democracy in Chile by encouraging the exchange of ideas and experience between the State and civil society.

Fund for Support to Gender Research:

The purpose of the Gender Research Fund is to support and stimulate efforts to promote research with a gender perspective.

II. The Evaluation

Sida commissioned an evaluation of the program, with emphasis on the second period of support. Due to delays in initial disbursements, program implementation was also delayed. Therefore, in some areas it was not possible to evaluate results, but rather to assess an ongoing process.

The main purpose of the evaluation is to assess the program's success in achieving its goals, as well as existing conditions for the sustainability of activities formerly supported by Sweden once the cooperation period is finalized. An additional goal of the evaluation is to identify areas in which the experience of SERNAM and other Chilean organizations may be able to offer conceptual or methodological contributions for other Latin American countries involved in similar processes, as well as lessons for future Swedish support in the promotion of gender equality.

The evaluation was carried out using primarily qualitative methods. During three weeks in the field, both individual and group interviews were carried out with key informants, including national and regional SERNAM staff, representatives from ministries, municipalities and non governmental organizations involved with SERNAM, as well as with some beneficiaries of SERNAM programs. Documentary revision included reports, publications and audio visual materials produced by SERNAM and organizations connected to the program, as well as independent evaluations carried out of different aspects of the program. All visits were made in two regions of the country: Valparaiso (Region 5) and Santiago, where the majority of activities supported by Sweden are concentrated.

In terms of the reliability of the conclusions presented, it should be acknowledged that although efforts were made to interview the greatest number of persons and institutions involved in the Swedish support to SERNAM, given the time constraints of the mission, it was not possible to explore each of the components of the Swedish Program in depth, nor to cover more regions of the country. With this in mind, the mission decided to give priority to covering as broad a range of actors and programs as possible within a limited geographical location. The validity of the information gathered was tested by comparing the comments of different sources regarding each program, and concentrating in future interviews on areas in which there seemed to be discrepancies or differences in interpretation. Therefore, we consider the global assessment of the Swedish Support to SERNAM to be reliable, although there may be some omissions or misunderstandings with regard to specific details.

III. Main Findings

The team considers that the Swedish Cooperation for the National Program for Women has been quite successful, taking into account the following observations:

- The funds contributed by Sweden have been used with efficiency and transparency in accordance with the agreed upon plans and budgets;
- The activities presented in the project document have been carried out according to plans, and in most of the components, the targets have been over reached. The only setback with regard to the time frame of the program is due to delays in the initial disbursements from Sweden;
- The program has made substantial progress in achieving the specific goals set for each of the components;
- The funds provided by Sweden have been critical in the consolidation of SERNAM as an institution, as well as the development of the Equal Opportunity Plan as a conceptual and methodological tool for the incorporation of a gender perspective into public policy;
- The support provided to SERNAM has achieved a high degree of financial and institutional sustainability, as evidenced by the integration of a great part of the activities formerly financed by Sweden into SERNAM's national budget;

- The program has contributed to the efforts of civil society to strengthen the position of women in Chilean society, and to effect structural changes in gender relations, as well as encouraging greater dialogue between SERNAM and institutions of civil society.
- The program has contributed to the production of knowledge from a gender perspective, as well as helping to present gender equality as a legitimate subject for scholarly research.

Institutional Challenges faced by SERNAM

The mission believes that SERNAM has achieved exceptional progress in a relatively short period of time, and that it has made a substantial contribution to the strengthening of democracy in Chile. Furthermore, SERNAM's experiences provide an important frame of reference for other countries in Latin America who are currently in the process of institutional development. With this in mind, the mission believes that the following areas are challenges which need to be further addressed for SERNAM's institutional consolidation:

- Improving the definition of the respective roles of the different departments of SERNAM, as well as the mechanisms for coordination between them
- Strengthening the development of regional and municipal plans, and
- Consolidating the procedures for monitoring the implementation of the Equal Opportunity Plan through the development of indicators to measure the impact of the activities carried out.

The Fund for Gender Research and Civil Society

With regard to the Funds for Gender Research and Civil Society the results are more mixed. In both cases the funds provided by Sweden were administered efficiently, in accordance with the agreements. Furthermore, the activities carried out with the funds were in line with the goals of the cooperation, and made important contributions to the advancement of gender equality in Chile. However, in both situations future sustainability is doubtful. In the case of the Fund to Support Civil Society, Sweden's decision to approve the funds was contingent on SERNAM's willingness to administer them, in spite of the fact that this channel was considered inappropriate both by SERNAM as well as the NGO counterparts. Considering that the main justification for channeling the funds through SERNAM was to ensure that the government would maintain the funds in the future, one would have to conclude that at least from the standpoint of sustainability, this component was only partially successful.

Future Opportunities for Cooperation

The fact that Chile is beginning to develop its own international cooperation program, presents new opportunities for joint cooperation with Sweden, particularly with regard to gender equality. SERNAM's experience in this field is well recognized throughout Latin America and already it has sponsored some international activities together with Sweden both in Nicaragua

and in Bolivia.

Chile has placed special emphasis on cooperation with Central America, Paraguay and Bolivia, which coincide with Swedish priorities as well. This kind of triangular cooperation seems to be an excellent way to take advantage of Chile's regional expertise and contributes both to strengthening Swedish cooperation in the region, as well as strengthening ties between Chile and the rest of the region. In addition, it is recommended that Chilean and regional NGOs be included as possible counterparts in the horizontal cooperation process.

Finally, although direct bilateral support is being phased out, SERNAM is anxious to maintain a relationship of exchange and technical support from Sweden in specific areas. The visits of Chilean women to Sweden have been greatly appreciated, and have contributed to strengthening support for gender equality in Chile, as have the visits of Swedish technical advisors, such as the support from Statistics Sweden. The team considers this to be a valuable and appropriate form of cooperation which enriches both Chile as well as Swedish development cooperation, and suggests that it be maintained in the future.



Sida Support to World University Service - South Africa (WUS-SA) 1993-1996

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different project partners, taking into account their different contexts and constraints. These plans should be within agreed time frames.

Recommendation 6:

WUS-SA needs to address the need to increase its delivery and reach a greater number of learners.

4.2.2. Women, Gender and Development Programme (WGDP)

Established in 1992, the Women, Gender and Development Programme (WGDP) is perhaps the second most important programme supported by WUS-SA. It highlights the importance of building gender sensitivity and gender awareness policies and practices within the NGO sector, and emphasises the need to address the specific needs of women who are severely marginalised in society. The objectives of the WGDP were articulated by WUS-SA in its Annual Report 1993-94 as the following:

- To provide a forum for organizations concerned with women and gender to develop a common agenda and to identify issues around which to lobby and advocate;
- To work out interconnected approaches towards redressing race, class and gender imbalances within organizations;
- To share methodologies and tools for gender analysis and gender planning in organizations;
- To relate gender issues to the specific cultural context of programme beneficiaries;
- To facilitate the empowerment of women and especially black women, within national and organizational development programmes and policies.

In 1993, WUS-SA had appointed one full-time coordinator to run the WGDP programme. The programme concentrated on needs assessments of project partners involving: the development of affirmative action policies, the integration of gender issues into programme planning, the development of a resource manual for gender awareness trainers, and the organization of a gender planning training workshop for a variety of NGOs, political organizations, trade unions, and WUS-SA project partners. By the end of the 1993-94 funding year the gender training manual had not been completed but had been carried over into the next funding year to be completed with the cooperation of other experienced trainers.

For the 1994-95 funding year, WUS-SA projected the need for increased attention to the area of affirmative action and leadership training with the aim of improving gender sensitivity in project planning and implementation. As a result, the WGDP was targeted for expansion within WUS-SA.

WUS-SA staff began targeting the leadership of the organizations whose projects they supported. They facilitated training workshops to encourage policy development and resource allocation which addressed the specific concerns of women living in a sexist society. In 1995 a Gender Training Workshop was organized and addressed to directors, managers and coordinators of partner organizations. Project partners were encouraged to develop practices in their organizations that would begin to visibly address power imbalances in NGOs.

Another component of the WGDP strategy was to identify individual trainers who qualified for and were interested in pursuing basic gender awareness and gender analysis training to improve their own training work.

A high rate of staff turnover was experienced in 1994-95 and affected the WGDP in the following funding year. WUS-SA responded by restructuring the organization and linking the work of the WGDP directly to that of the SAIP. The linking of the activities of these two programme areas enabled the WGDP to influence the work of their project partners more effectively. Gender equality became a more explicit condition of the contracts between WUS-SA and its project partners, and served as a mechanism to monitor the policy making of its partners in a more comprehensive way (by including more of the staff and making gender equality one of many conditions for funding and successful evaluation instead of a secondary effect of project work). In addition, two full-time staff members were hired to improve consistency and integration between the WGDP and the SAIP.

Training remained the central activity of the WGDP throughout, although the overall objectives of the WGDP's training programme were modified slightly. The modified objectives reflected the needs of its project partners and identified the central goals of the WGDP more explicitly.

Two training exercises geared to fulfill the modified objectives were completed in the 1995-96 funding year. Seventy percent of project partners were targeted by one of the completed training sessions intended for the leadership of project partners. However, according to WUS-SA, many directors of their project partners still did not consider gender to be a priority and did not attend. Therefore, the training workshop reached about 50 of the 100 directors, coordinators, and managers targeted among the project partners.

In July 1996, WUS-SA succeeded in convening a training workshop for trainers with the aim of developing a pool of gender trainers to serve as resource persons in their respective regions. This exercise included approximately 18 trainees from different geographical regions and different backgrounds. Individuals from rural backgrounds constituted almost 50% of the participants list, reflecting WUS-SA's continued emphasis on working with rural-based organizations and individuals.

A follow-up on the "training of trainers" (TOT) course with the same group of people, took place in October 1996. This training was meant to have more in-depth gender content than the previous workshop, and to prepare facilitators for the next training activity to be held in Durban (Oct-Nov. 1996). Thirteen people attended this follow-up workshop.

A "training of facilitators" workshop took place, as planned, at the end of October/beginning of November, co-hosted by WUS-SA and a project partner, SACHED. It was attended by 46 rural facilitators from different regions who work in the field of adult education. The aim was to provide the participants with tools to raise gender awareness and sensitize project participants on gender issues, as well as to integrate gender into the planning of programmes and projects. This exercise was based on the expectation that the participants would organize training activities in their regions and with their organizations, multiplying the efforts made by WUS-SA to mainstream gender at grass-root level.

In December 1996, WUS-SA revealed their commitment to working beyond a localised approach to social change. Together with GETNET, they co-hosted a Southern African Regional seminar to look at international instruments such as CEDAW (the Convention for the Elimination of all Discrimination Against Women) and the implementation of the Beijing Platform for Action, and to evaluate how they were being implemented in the countries of the region to advance the struggle for gender equality. This seminar was also intended to contribute to the exchange of information between NGOs and governments, and between regions, and to develop networking opportunity among Southern African organizations who were integrating gender issues into their project planning and implementation.

Its impact can only be assessed in coming years, but this step is a positive move towards emphasizing the importance of gender issues in the regional agenda, and to mobilize countries to develop gender-sensitive regional and national policy and concrete plans adapted to their own reality. This has also given WUS-SA the opportunity for exposure to the international arena with the goal of making contacts for its future activities.

During our interview with WUS-SA and WGDP staff we were informed that for the 1997-98 funding year, the WGDP is planning to complete a draft edition of a glossary booklet on concepts, issues and terms used in gender training; convene a policy formulation workshop targeting policy makers of all WUS-SA project partners; conduct educational seminars on topics such as women and the constitution, the impact of the new national machinery on the women's movement, and women in rural government and adult education; and visit project partners to assess the impact of WGDP work on the participating organizations. They will also conclude the analysis of the activities of the WGDP based on the production of teaching/learning materials for ABET as requested by Sida.

In the documentation and through interviews with staff, it is clear that WUS-SA is aware of the need for continued rigorous activity in the area of gender-sensitizing among their project partners.

MAIN FINDINGS:

1. The WGDP is concentrating its efforts to mainstream gender among their project partners and at national and regional levels.
2. To ensure progress towards gender equality, WUS-SA is developing training activities addressing its project partners at decision making levels as well as preparing trainers to mainstream gender at provincial and grassroots levels. To guarantee that gender issues be put on the agenda, an explicit condition of funding should be that project partners include in their funding proposal indications of women's advancement. In addition, when monitoring its project partners WUS-SA should evaluate the role of gender in the planning and implementation of funded programmes.
3. During the field work project partners indicated that participation in the gender workshop coordinated by WUS-SA did not produce a serious impact on grassroots work. Project partners have experienced difficulties on how to address the problem of gender inequality in their delivery activities. It is acknowledged that the workshops do provide a good theoretical analysis and can

sensitize the participants on gender issues, but the exercises do not provide them with clear guidelines and tools on how to address the problem in their programmes. Other arguments indicated that the contents were too general and were not related sufficiently to the current gender situation in the communities where they work

4. WUS-SA is aware of the need to continue mainstreaming gender at national and regional levels and establish links with other organizations working in the field of education and gender. In this vein, they have recently organized the "Gender Equality: Strategies for Effective Intervention" seminar to mobilize national, regional and government organizations to strategize and implement a follow-up on the Beijing Conference with a "regional and southern African face".

5. WUS-SA's work has to be seen in the context of gender in South Africa. At an organizational level, particularly in government, there is a move to include women at higher levels of decision making, but the women's movement in civil society, continues to be weak and unorganized.

CONCLUSIONS:

1. As a result of WUS-SA's emphasis on the importance of gender equality, an impact within partner organizations is felt, such as the integration of more women at the decision making level and the creation of gender units.

2. The impact of mainstreaming gender at national and regional level will only be felt in the coming years because the seminar was only recently organized. However, a close follow-up on the recommendations will be undertaken by WUS-SA, and it is expected that it will encourage the partner organizations to network among themselves and with international organizations working in similar areas.

3. The gender component must be strengthened with an approach that is more organically linked to the activities of project partners, through either a separate workshop or in a new approach of co-participation with the capacity building workshop.

RECOMMENDATIONS:

Recommendation 1:

The Gender programme should be strengthened by addressing issues that are related to the needs of project partners, with particular attention to mainstreaming gender in teacher training and learners' materials. Relevant guidelines and tools should be provided to partner organizations to address gender during the teaching/learning process.

Similarly, WUS-SA and the WGDP should develop needs-assessment studies of the gender situation in areas where project partners are working.

Recommendation 2:

It is important that the Unit should complete the already planned materials, as they will be support material for their future activities, e.g.:

- *The draft edition of the glossary booklet;*

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