



*Report 63*

# **Gender and Monitoring: A Review of Practical Experiences**

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## **1 INTRODUCTION: THE NEED FOR GENDER-SENSITIVE MONITORING AND EVALUATION MECHANISMS<sup>1</sup>**

*Many bodies aim to mainstream gender, but few track how effective they are in doing so with monitoring and evaluation.*

The mechanisms used to monitor and evaluate development programmes, projects and policies have so far been largely gender blind. However the differential impacts of development initiatives on women and men can only be identified if monitoring and evaluation mechanisms are sensitive to gender. This enables crucial adjustment of programmes and policies to fit and respond to gender issues and needs in a more comprehensive way and to ensure that intentions in planning and policy are met.

Especially since the Fourth International Women's Conference in Beijing, in 1995, there have been several attempts to mainstream gender. Gender mainstreaming, i.e. the integration of a gender perspective into policies and strategies, can happen at different levels: at field level, in programmes and projects; at institutional level, within development institutions and organisations and at government level. Many donors and NGOs have started the process of gender mainstreaming. Few, though, have developed systems to monitor and evaluate the gender impact of their programmes, projects and policies or of the gender institutionalising process within their organisations or at government level.

This report aims to provide a practical tool that can be used to integrate a gender approach into existing monitoring and evaluation mechanisms. This paper first defines M&E, goes on to look at how indicators can be made gender-sensitive, who should be involved in this process, and when during the project cycle. Case studies follow of implementation of such approaches at field level (projects and programmes), institutional and government level. The paper concludes with some recommendations and suggestions.

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<sup>1</sup> This paper was commissioned by the Swiss Agency for Development and Co-operation (SDC) and provides an overview of the most recent work on monitoring and evaluation from a gender perspective. The purpose is not to address theoretical issues, but to give practical examples of methodologies and case studies and to offer comments and recommendations. It provides an overview rather than an in-depth analysis and any gaps might be due to time constraints and the scarcity of the information available, as gender M&E is underdeveloped, and much of the relevant material is internal to institutions applying such monitoring and evaluation mechanisms. Where possible, examples which are relevant to the 5 SDC thematic areas have been included (see Appendix 2).

## 2 WHAT IS MONITORING AND EVALUATION: DEFINITIONS

Monitoring and assessment mechanisms facilitate the implementation of policy because they measure the impact of the activities of a development programme or policy on the target group and assess whether the targets are actually met. Monitoring and Evaluation is a general term that is used to describe this type of process. Audits and impact assessments are terms used to define more specific monitoring and evaluation methodologies.

In practise, such terms are often used interchangeably. However, some of the differences are drawn out below:

- Monitoring is the regular collection, analysis and distribution of information and data on the progress of the activities and programmes implemented (Walters, 1995).
- Audits evaluate policies, reports, functions, establish whether those are actually applied in reality and identify opportunities for improvement (SNV, 2000).
- Evaluation and impact assessment work at a deeper level. They are two slightly different processes although they both make an assessment of the project or programme against its targets. Evaluation establishes whether the positive outcomes planned by the project have been achieved (Walters, 1995); impact assessment looks at the positive and negative impact of the project (Goyder et al, 1998).

This paper mainly focuses on Monitoring and Evaluation mechanisms, but also touches on impact assessment, self-assessment and audit mechanisms.

To measure the implementation of gender initiatives, such measuring and assessment mechanisms must be gender-sensitive. Depending on project goals, this could mean that they are designed or formulated in such a way as to

- identify differences between women and men in perceptions, attitudes, opportunities, and access to resources and decision-making
- assess how such projects, programmes and policies impact on social understandings of what it means to be a woman or a man, on gender relations in the household, community, economy and beyond.

### **3 DESIGNING GENDER-SENSITIVE MONITORING AND EVALUATION**

In order to measure how well a development project or programme has scored in its gender targets and if its results relating to gender equality have been achieved, indicators must be gender-sensitive. Gender-sensitive indicators can measure gender-related changes in society over time. They can also make visible activities in which women may predominate, and which are ignored by mainstream indicators such as gross national product (GNP), such as housework, childcare and the informal economy (CIDA, 1997). Gender-sensitive indicators are important political tools because the information produced can be used to advocate for gender equality and advance the agendas of women's empowerment. However, there are also limitations to such indicators, as presented at the end of this section.

#### **3.1 What makes indicators gender-sensitive**

##### **3.1.1 Gender disaggregation**

Gender-disaggregated data is needed in all types of monitoring and evaluation, auditing or impact assessment process. It is very important that indicators or other tools for monitoring and evaluation provide disaggregated data by sex because information is not neutral and is likely to differ between women or men. Data will often need also to be disaggregated along other lines such as age, urban/rural, ethnic group, disability, etc.

##### **Example**

In an impact assessment study conducted by Action Aid in Bangladesh, preferences for change expressed by men and women varied. While they were both in agreement about the hope for increased income, men gave higher priority to changes related to women's development than the women themselves. On the other hand, though, women gave higher priority to access to loans, increased decision-making and greater mobility for women (Goyder et al., 1998).

Gender-disaggregated data is important, but not sufficient. This data may show differences between groups of women and men, but fail to show the gendered power relations between these groups, hence the need for qualitative analysis.

##### **3.1.2 Qualitative and quantitative**

Gender issues are so inextricably linked to cultural values, social attitudes and perceptions that measuring them must mean using a variety of indicators engendering both quantitative and qualitative information. Qualitative analysis is used to understand social processes, why and how a particular situation measured by indicators has taken place and how such a situation could be changed in the future. Qualitative analysis should be used in all stages of the project cycle (CIDA, 1997).

##### **Example**

In the area of political and public life, useful quantitative indicators could be: % of seats held by women and men in national parliaments and local government/decision making bodies; % of women and men electoral candidates/officers in political parties; % of women/men registered as voters. However, these statistics give a static profile of the situation, and are only given meaning when the underlying dynamics are explored by looking at such questions as: What are the

obstacles preventing women from gaining decision-making positions in government or the civil service? Is one socio-economic group dominant as far as holding decision-making positions is concerned? What input do women make to changes in the political system? (Beck, 1999)

### **3.2 Who measures?**

Who decides the indicator and who does the research has important implications for gender sensitivity.

#### **3.2.1 Who monitors and why?**

As monitoring is generally guided by the interests of the stakeholders who carry out the process, the exercise is likely to be focused on specific issues that could be instrumental in achieving the results desired by these stakeholders. The monitoring process could then be biased and neglect relevant information on changes to gender relations. This is one reason the target group should always participate in the process.

##### **Example**

A funding organisation may view M&E as a way to improve the effective use of funds, a manager as a means to monitor progress in implementation, and a NGO as a way to explain its impact to outside donors. These priorities may distort the process of monitoring and evaluating progress on gender goals.

#### **3.2.2 Participation**

A participatory M&E process is one in which the target groups have genuine input into developing indicators to monitor and measure change. If successful, this allows for the M&E process to be 'owned' by the group rather than imposed on them by outsiders. It is essential that the perspectives of women are included and input into developing indicators.

##### **Example**

The Impact Assessment Study of projects supported by Action Aid in Bangladesh was carried out in a participatory manner. The target group was involved in the design of indicators which resulted in some new indicators that had not been previously identified by NGO staff but that were considered relevant by members of the community. These indicators include: increase in the number of NGOs as an indicator of reduced dependency of women on men and making puffed rice or poultry raising as indicators of women's mobility (Beck, 1999).

There can often be a gap between intent and practise in participation. Attention to this issue needs to be given in M&E.

##### **Example**

In a project supported by the Agency for Cooperation and Research in Development (ACORD) in Gulu, Uganda, groups meet every year to discuss their work and plan future activities. However, the first meeting coincided with the busiest time of the year for women, so very few women attended and those who went sat at the back of the room and hardly participated. The following year issues of time and participation were raised, so the meeting was organised at a

more convenient time and seats were arranged in a circle. As a result, the attendance and participation of women significantly improved (Hadjipateras, 1997).

### **3.2.3 Data collection and analysis**

The collection and analysis of the information gathered is not a gender neutral process and is subject to gender bias and gender laden cultural attitudes. Sometimes it might be more appropriate to have women interviewers, or interviewers of the same sex as interviewees. The people carrying out the data collection and analysis might not be gender aware. Interviewers might be less comfortable talking with one sex or another. It is also very common that interviewers are not gender aware, and might disregard certain important data or play down the importance of particular gender differences. Gender training is one way to address bias or lack of sensitivity of personnel collecting and analysing data.

#### **Example**

In the case of a survey conducted by researcher Jon Cloke in Nicaragua, the results changed dramatically if the interviewee was a man or a woman. When women were asked who was the owner of the property in which they lived, 75% said it was a woman and 25% said it was a man. On the other hand, if men were asked the same question, they answered the exact reverse: 75% said a man, 25% a woman. Responses were also very different depending on whether the interviewer was male or female, and whether they were interviewing a woman or a man (Jon Cloke). On the other hand, in the case of an impact assessment study carried out by Action Aid in Ghana, the problem lay not so much in collecting the different views of women and men, but in retaining such differences when the experience was interpreted and summarised within the organisation.

## **3.3 Indicators and the project process: when and what to measure?**

### **3.3.1 Clear objectives**

In order for indicators to be effective, the objectives of a development initiative against which results are measured must be clear, explicit, feasible, verifiable and realistically timed. Indicators must be closely related to objectives. Objectives should be agreed in consultation with or through the participation of the target group so that they can reflect any changes in gender relations the target group aspire to.

In a programme supported by Netherlands Development Organisation (SNV) in Rwanda, the men and women of the target group decided on the objective of the activity they were executing with support from the project. By choosing the activities and aspired objectives, women expressed their will to improve their position with respect to that of their husbands:

- Having their own source of income
- Training by and for women
- To show men the will and abilities women possess
- To be less dependent on men
- To strengthen the cooperation and solidarity of women in order to increase their power to carry out action

Source: Walters, 1995

### 3.3.2 Baseline survey

A baseline study on gender relations or situation should be carried out before the project or programme is implemented to provide a basis for assessing the results and impact of a programme and policy. Where possible, such studies should include data disaggregated by sex, socio-economic and ethnic grouping and age.

#### Examples of baseline data

##### Participation in decision making

- Representation and participation of women in formal government legislative and administrative (public services) bodies at national, regional and local level;
- Representation and participation of women in informal decision-making structures (e.g. village council);
- Prevailing customs and social attitudes regarding the decision-making pattern at household and community level;
- Legislation on women's participation in decision-making bodies;
- Percentage of population voting, by sex.

##### Income

- Legislation on equal pay for equal work;
- Ratio of female to male wages;
- Distribution of and control over income (money, in kind) within the household.

Source: Walters, 1995

### 3.3.3 Indicators of risk/enabling factors

These measure external factors that may contribute to the success or failure of the programme or policy. Especially when tracking changes in gender relations, it is important to analyse these within context. External factors include socio-economic and environmental factors, the operation and functioning of institutions, the legal system and socio-cultural practices, training and schooling, and political developments at local national and international level.

#### Example

The government of a country introduces a new law that gives women land property rights. In this case it is important to assess what are the consequences of this development for the position of men and women. Does it change decision-making structures within the household? Does it increase women's access to and control of resources? (Walters 1995)

### 3.3.4 Project cycle

Gender needs to be considered and monitored at **each and every stage** in the project/programme or policy formulation process. It is useful to differentiate between the different types of indicators used. **Input indicators** measure which and to what extent resources have been allocated to ensure that a project or policy can actually be implemented. **Performance indicators** (also called Process indicators) measure the activities during implementation to track progress towards the intended results. **Progress indicators** (also called Outcome indicators) measure the long-term results of the programme or policy and whether they contributed towards gender equality.

### Example

In the health area, some examples of indicators that could be used are: number of health workers trained, number of buildings used as clinics, instructional material and its gender make-up (input indicators); regular meetings of women and health care workers, number of visits to mobile clinic, by sex of mother and child, views of activities of health workers and clinic of parents (performance indicators); reduced infant, child, and maternal mortality and morbidity rates as compared to the national average within five years, improved status of women through better female health (outcome indicators) (CIDA, 1997).

### **3.4 One type of gender-sensitive indicator: gender empowerment measures**

There have been some attempts to develop indicators to measure empowerment of women or other groups. However, empowerment can have many meanings, is complex, and often includes people's subjective feelings of power or lack of agency. It is thus important to be clear about exactly what empowerment indicators measure and show, and complement this with qualitative gender analysis.

#### **3.4.1 ESCAP empowerment indicators**

According to the Economic and Social Commission for Asia and the Pacific (ESCAP), several factors should be measured in order to better understand changes experienced by women during the implementation of the Beijing Platform for action: cognitive (knowledge and perceptions), behavioural (practices and actions) and affective (attitudes and motivations). These should be complemented by reflections on self-esteem and self-confidence, the importance given by a woman to her family and the community, and basic satisfaction and dissatisfaction with her life.

(Psychological indicators have been designed for each one of the Beijing concern areas but I have selected here only those referring to SDC's thematic areas).

AREA OF CONCERN	KNOWLEDGE	ATTITUDE	PRACTICE/ BEHAVIOUR
ARMED CONFLICT	<ul style="list-style-type: none"> <li>• Knowledge among key sectors (government, NGOs, students) of facts on women in armed conflict, as victims (over-represented) and as decision-makers (under-represented)</li> </ul>	<ul style="list-style-type: none"> <li>• Appreciation of women's role in peace-making – actual and potential</li> </ul>	<ul style="list-style-type: none"> <li>• Inclusion, appointment, nomination of women to national and international bodies related to peace</li> </ul>
ECONOMY	<ul style="list-style-type: none"> <li>• Understanding of women's contribution (usually unpaid, unrecorded and undervalued) to the economy</li> </ul>	<ul style="list-style-type: none"> <li>• Interest in self-employment and entrepreneurial activities</li> <li>• Willingness to take moderate risks</li> <li>• Self-confidence</li> </ul>	<ul style="list-style-type: none"> <li>• Participation in organised economic activity</li> </ul>
POWER AND DECISION-MAKING	<ul style="list-style-type: none"> <li>• Knowledge of community and women's issues</li> <li>• Awareness of local politics and legal rights</li> </ul>	<ul style="list-style-type: none"> <li>• Feelings toward current political leadership</li> <li>• Opinions on local and national issues</li> </ul>	<ul style="list-style-type: none"> <li>• Participation in public protests and campaigns</li> <li>• Joining organised groups</li> </ul>
ENVIRONMENT	<ul style="list-style-type: none"> <li>• Knowledge of role of women particularly rural and indigenous women in sustainable development</li> <li>• Awareness of gender concerns and perspectives in relation to sustainable development</li> </ul>	<ul style="list-style-type: none"> <li>• Appreciation and value for women's traditional knowledge and practices in sustainable resource use</li> </ul>	<ul style="list-style-type: none"> <li>• Leadership in community activities on matters related to environment</li> <li>• Taking appropriate measures to reduce risk from environmental hazards</li> </ul>

Source: Licuanan, 1999

However, in my opinion some of the above indicators suggest stereotypical assumptions about women, such as an inclination to be peaceful or protect the environment, assumptions which have been challenged in development literature (Jackson, 1992, and Leach, 1992)

### 3.4.2 Canadian International Development Agency (CIDA) empowerment indicators

CIDA has also attempted to measure empowerment. They recommend clearly defining empowerment in order to measure more effectively, and to include personal, socio-economic and political factors in empowerment indicators. According to CIDA there can be quantitative and qualitative indicators of empowerment.

#### Example

In the area of political participation, suggested indicators could be: % of women in decision-making positions in local government and % of union members who are women (quantitative); To what degree are women aware of local politics and their legal rights? Are women more or less aware than men? (qualitative) (CIDA, 1997).

### **3.4.3 UNDP's Gender Empowerment Measure**

In preparation for the 1995 United Nations World Conference on Women held in Beijing, the United Nations Development Programme (UNDP) introduced a new composite indicator, the Gender Empowerment Measure (GEM). This examines whether men and women are able to participate actively in economic and political life. GEM combines three other indicators: per capita income; the share of jobs classified as professional and technical, and administrative and managerial, going to men and women; and the share of parliamentary seats going to men and women. GEM has limitations in that it has been developed with very little public participation and some indicators have been given the same weighting for no apparent reason (e.g. education and life expectancy).

### **3.4.4 Bangladesh Rural Advancement Committee (BRAC) and Grameen Bank**

In their evaluation of microcredit programmes, BRAC and Grameen Bank have used eight indicators to measure women's empowerment:

- Mobility
  - Economic security
  - Ability to make larger purchases
  - Involvement in major household decisions
  - Relative freedom from domination within the family
  - Political and legal awareness
  - Involvement in political campaigning and protests
- (Oxaal et al., 1997)

## **3.5 Limitations of gender-sensitive indicators**

Like all indicators, gender-sensitive indicators have limitations. Acknowledging these limitations is useful to understanding what they can or cannot achieve and how to complement them with other tools or methods.

Common problems and limitations are:

- It is difficult to find indicators which provide dynamic information on gender relations, how they were shaped and how they can be changed;
- Indicators are often based on census surveys which are insensitive to sex biases, collected by people who lack gender awareness and use imprecise definitions of key terms
- They may not be comparable internationally due to country-, language- or cultural- specific definitions which often have very different implications (i.e. economic activity or literacy).
- It is often not thought through what changes should be measured against. For example in examining women's status in a specific country, would the benchmark be the situation of men in that particular country or the situation of women in other countries or another measure altogether/
- Indicators are often developed by experts in a non-participatory way and as such might not include cross-cultural dimensions or reflect a general consensus. (Beck, 1999). Women and men from the target groups might measure changes against very important cultural or local elements that are likely to be overseen by experts who formulate indicators without any input from them. Important indications on changes in gender relations, or in the position of women in society, the household or the community might be neglected.

## **4 LEVELS OF IMPLEMENTATION**

M&E mechanisms can be applied at various levels. They can be used to monitor projects at field level, programmes both at field and at institutional levels, and policies at institutional and governmental level. This section explores the implications of using such mechanisms for each level and presents some experiences.

### **4.1 *Projects and programmes at field level***

In order to achieve gender targets and to improve gender relations as a consequence of the implementation of any project or programme, projects must be planned in such a way that gender issues are taken into account in each and every stage of the project and that gender analysis is used throughout. This is called gender planning. M&E is an important part of the planning process because they monitor the impact of planned activities on the target group and assess whether the targets set by the project are actually met. The following are several experiences of M&E from a gender perspective which have been designed and applied by various NGOs and donor agencies, however the scope is by no means exhaustive.

#### **4.1.1 *The World Bank: gender and monitoring in water and sanitation projects***

In 1996, the World Bank created a Toolkit on Water and Sanitation with various instruments suggesting how to best integrate a gender approach in the planning process of water and sanitation. Among these instruments are terms of reference for a gender analysis during monitoring and evaluation. In particular, it is suggested:

- to produce gender-disaggregated data and gender-sensitive indicators;
- to measure the impact of the project on women and men separately;
- to analyse the participation of women and men into projects and their access to resources;
- to examine the staff attitudes towards gender issues;
- to assess the training of women and men in areas like maintenance and hygiene education;
- to examine how much women and men could decide the type of technology used and the siting of facilities;
- to involve community women and men in data collection and analysis.
- to organise meetings to inform all stakeholders on monitoring and evaluation findings, including project staff and communities;
- to identify areas for further research;
- to analyse additional benefits from the project, if and how they were gained and how they were used;
- to analyse additional costs in time or labour for men or women generated by the paper;
- to draw lessons and provide recommendations.

(Fong et al., 1996)

#### **4.1.2 *Microfinance and microenterprise: gender impact assessment***

Researcher Susan Johnson argues that, although many microfinance and microenterprise projects may target women, it does not mean that they take gender relations into account. She suggests to use gender impact assessment to monitor the positive and negative impact of a particular project on gender relations. Such mechanisms should be gender-sensitive and used in a gender-sensitive way, i.e. using male and female researchers, finding locations for the

activities where women feel comfortable, and a time of day most suitable for them, using focus groups (e.g. separate men and women in group discussions). After the impact assessment has been carried out, it is necessary to feed the result back into the project to make necessary revisions, and into the institution to implement a gender policy that addresses issues of staffing, organisation and management.

#### **How to approach gender impact assessment?**

- Establish the nature of gender relations in spheres relevant to the project (eg. access and control of resources, control of incomes within the household, patterns of expenditure within the household if these are the gender relations that are more likely to affect the impact of the project.)
- Consider the potential impacts of the project on gender relations (useful to analyse possible outcomes, and adjust the project/programme accordingly)
- Establish the information required and design appropriate indicators (disaggregate all data, consider the impact on gender relations)
- Collect and analyse the data using appropriate tools and techniques (quantitative and qualitative)
- Carry out the process in gender-sensitive ways.

Source: Johnson, 2000

#### **4.1.3 Action Aid: participatory impact assessment**

Action Aid has been carrying out a research project on methods and indicators for measuring the impact of their programmes and projects on poverty reduction. Various processes have been started in different countries and reviews have been written. Each impact assessment exercise has been carried out in a highly participatory and gender-sensitive way. Some lessons came out of the process as far as gender is concerned:

- Gender analysis is important during the data collection stage, but also in the process of analysis and interpretation of the data collected. Indeed it was not so difficult to differentiate the views of men and women. It was more complicated to retain those differences when the information was interpreted and compiled within the organisation, especially when differences were more subtle or not stereotyped
- Discussion groups were divided by gender and age (male/female adult, male/female youth). In certain cases, this reinforced gender roles rather than challenging them by focusing on certain traditional areas where men and women have different interests reflected by their gender roles (i.e. water and immunisation for women, bullock ploughs and migration for men) without analysing and interpreting differences specifically in more common areas.
- It was easier to work with groups with defined collective interests that are already divided by gender (eg. women and men savings groups) rather than with completely new groups.
- It is important to view gender issues within the wider assessment of poverty or project area and not as a separate issue.
- Importance of a local differentiation of gender needs. In Bangladesh and in India, for example, women's and men's preferences for change were variable according to the area and did not necessarily fit stereotypes.

(Goyder et al., 1996)

In all the 6 villages studies carried out in Bangladesh, men and women said that increased income was their highest priority. In some villages men and women agreed on particular women's development related changes and in others they did not. Also women's preferences changed between villages. In India, men and women's preferences were similar in some areas but not in others. In some cases, male youth were more similar to women's preferences, but in another case, they were closer to those of adult men.

Source: Goyder et al., 1998

#### ***4.1.4 The International Labour Office (ILO): integrating gender issues into the monitoring and evaluation of projects and programmes***

The Evaluation Unit of the Bureau of Programming and Management of the International Labour Office (ILO) has developed general guidelines on using gender-sensitive monitoring and evaluation mechanisms for their programmes and projects. They also produced checklists with gender considerations to be taken into account in the design of monitoring and evaluation processes for summary project outlines and programme documents, progress review reports, and self-evaluation reports (for reference, see Appendix 2). They provide useful suggestions and practical tools. General recommendations include: to analyse gender roles within the target group, to identify their different needs and take steps to address them, to involve groups and organisations with gender expertise in the planning process, and to involve people from the target group, especially women so that they can express their needs and priorities.

##### **Checklist: gender considerations in Progress Review Reports. Outputs and activities**

Specify how many people have participated in the programme activities. If the proportion of women participating is low, consider the following constraints:

- a low level of gender awareness among the staff of the programme and/or the partner organisations at the policy making and/or implementation levels. This results in incorrect assumptions on women's roles and needs which are not based on factual information, make women's work invisible and neglect women's potential to participate in and benefit from the programme;
- lack of gender specificity in the programme document;
- insufficient representation of women and women's organisations in the programme's steering or advisory committee(s);
- a low level of gender awareness among the target population;
- existence of socio-cultural or legal barriers, which may prohibit or inhibit women's participation in the programme;
- low commitment or interest among women because the programme does not address their needs or increases their workload;
- lower educational levels of women;
- organisational arrangements such as the timing, location or duration of programme activities which may form a barrier to women's participation;
- use of communication channels which are not accessible to women.

Source: ILO, 1995

#### ***4.1.5 DFID: monitoring gender-sensitive poverty reduction strategy programmes***

In its strategy paper on Poverty Elimination and the Empowerment of Women, the British Department for International Development (DFID) proposes a series of guidelines for the introduction of gender-sensitive monitoring and evaluation mechanisms. The main recommendations are:

- to use appropriate indicators and integrate them with the Gender-related Development Index (GDI) and the Gender Empowerment Measure (GEM) developed by the United Nations Development Programme. For more detail on GEM, refer to the section on Gender Empowerment Measures;
- to support the improvement of governmental statistics that provide gender disaggregated data;
- to adapt any measure of progress to local conditions;
- to use qualitative measures;
- to foster participation.

#### ***4.1.6 SNV (Netherlands Development Organisation): monitoring projects and programmes through a participatory gender audit***

SNV has developed a manual to carry out participatory gender audits. This type of exercise aims at helping participants to assess whether with their work and their collaboration with others in the implementation of projects and programmes they contribute to gender equality. It is based on self-assessment so participants will be individuals employed in SNV programmes or associated with SNV through partner organisations or donors. The programme management will decide when to conduct a participatory gender audit and will disseminate the results and make sure they are fed back into the project or programme so that the effective implementation of any agreed action plan can be audited at a later stage. The focus of the gender audit is on the conditions created by SNV to foster gender equality and women's empowerment, the initiatives implemented to achieve such goals, the perception of achievement of those involved in or associated with the programme and finally the formulation of recommendations for improvement.

The methodology consists of a series of tools to be used in workshop sessions to help participants learn how to judge gender equality and women's empowerment and how to apply these objectives to their own work. They also provide tools to analyse the information gathered during the workshops. The document provides specific suggestions and tools to organise and facilitate the audit, and detailed handouts and checklists.

## ***4.2 Institutional level***

When gender mainstreaming policies are implemented at institutional level, strategies to monitor and evaluate their progress should be in place. However, in this search, no clear attempts to measure the progress of gender mainstreaming efforts within donor organisations were identified. This may be partly due to the fact that such mechanisms are often part of internal programme or policy documents and as such not accessible or that it is a neglected area.

#### 4.2.1 NGOs

Some NGOs, though, have documented reviewing processes of their gender policies. These are useful exercises to assess how well they are doing against gender targets and to re-adjust their policies and practices to improve their performance. In most of them, the following issues were raised:

- Inadequate monitoring and evaluation mechanisms
- Inadequate gender training at staff and field level
- Cultural resistance
- Lack of funding
- Inadequate staffing of women, especially at management level
- Poor accountability mechanisms

The most important lessons Catholic Agency for Overseas Development (CAFOD), Oxfam and the Agency for Cooperation and Research in Development (ACORD) learnt from their reviewing processes are:

- the need to listen and learn from staff and Southern counterparts, because gender relations differ from one culture to another and are an integral part of that culture;
- the inadequacy of some of the tools and models developed in the North by academics and NGOs, and the need constantly to question and re-think the issues and approaches;
- the time required to work on an issue which affects staff and counterparts at both a personal and a professional level: a long-term perspective is essential when trying to address real issues of social change;
- the need for real staff commitment and money to work on the issue, accepting that there will be no quick results.

Source: Wallace, 1998

#### 4.2.2 Agency for Cooperation and Research in Development (ACORD):

Although the British NGO ACORD has been implementing a gender mainstreaming policy at institutional level for a few years now, a review of such policy in 1996 identified some gaps. In particular, accountability mechanisms were considered very weak: the standard of annual reports was uneven thus undermining the usefulness of such tool to monitor and improve programmes. The lack of gender impact indicators was also identified as a problem, so were inadequate training and under-representation of women staff at management levels, cultural resistance, different understandings of the policy and confusion as to responsibility and procedure. One of the main lessons learnt from ACORD's experience is the importance for an organisation to look at itself critically. This enabled the organisation to revise the existing gender policy, and to strive for gender equality in programme outcomes and equal numbers of male and female staff.

#### 4.3 Government level

Two important international agreements were ratified by national governments by which they committed themselves to integrate a gender perspective in the functioning of their institutions and in their policies. They are the International Convention for the Elimination of all Discrimination against women (CEDAW) and the Beijing Platform for Action (BPFA) (an agenda with specific objectives aiming at gender equality in 12 different areas of concern and adopted at the Fourth World Conference on Women in Beijing in 1995). These agreements have

been very important because they introduced a gender perspective in government institutions and policies.

#### 4.3.1 National machineries

To aid with the implementation of their objectives, some mechanisms to monitor gender at government level, both within the institution and in its policies, have been introduced. These mechanisms are called National Machineries for Gender Equality and their main task is to support government-wide mainstreaming of a gender-equality perspective into all policy areas. The need to strengthen capacity building in monitoring and evaluation systems and skills was raised during the consultation on the Role of National Machineries held at the Follow-up and National Agenda setting session at the Beijing+5 Conference in New York in 2000. However, some National Machineries have envisaged mechanisms to monitor the actual implementation of the BPFA and to make governments accountable. In Rwanda, a committee composed of members of the National Machinery, United Nations agencies, bilateral agencies and non-governmental organisations monitors the implementation of the BPFA. In Jordan, where the National Machinery is composed of government officials and members of civil society, each participating government and civil society body is required to submit regular progress reports.

The Economic and Social Commission for Asia and The Pacific (ESCAP) has published a paper on Monitoring and Evaluation Strategies for the Empowerment of Women. This paper introduces the concepts of monitoring and evaluation and describes the progress achieved in monitoring the implementation of the BPFA at regional level. It also discusses some of the issues, including the collection and analysis of gender-disaggregated data, and proposes suggestions to strengthen monitoring and evaluation of the BPFA. It provides very interesting examples of monitoring and evaluation at regional level.

Recommendations include:

- the design of appropriate gender-sensitive indicators for all stages of the gender mainstreaming process, including qualitative, quantitative and empowerment indicators;
- support for training on monitoring and evaluation tools and methodologies for National Machineries, government agencies, donors and NGOs;
- greater cooperation among groups involved in monitoring and evaluation, for example between the National Machineries and statistical offices, and between the gender and statistical departments of donor agencies.

South East Asia Watch (SEAWatch) held a regional workshop which brought together experts and officials from government and non-governmental organisations from various countries involved in BPA monitoring. This *Regional Technical Workshop on Monitoring Indicators for the Beijing Platform for Action* resulted in the development of indicators for better monitoring in the area of women and the economy, women and health, and violence against women.

The international Women's Rights Action Watch-Asia Pacific (IWRAP-AP) is running the Project on Facilitating the Fulfilment of State Obligation Towards Women's Equality. It monitors and facilitates the government implementation of CEDAW in Mongolia, Malaysia, Vietnam, Thailand, Laos, Philippines, Indonesia and India.

Source: Licuanan, 1999

### **4.3.2 Gender budgets**

Outside the framework of such international agreements, there have been several attempts to hold governments accountable to women through monitoring processes. One of them is gender budgets. Implemented firstly in Australia and then in South Africa and later replicated in several other countries, gender budgets allow monitoring of whether the will to mainstream gender is reflected in the share of the budget allocated by the government to gender-sensitive areas.

A budget is often considered gender neutral, but if examined specifically, it reveals serious biases. Gender budgets are a tool of analysis in which the government budget is disaggregated and the effect of expenditure and revenue policies on women, men, girls and boys is analysed. Many countries are now trying to introduce this system. The Commonwealth Secretariat has implemented a gender budget initiative in several countries now, namely Sri Lanka, Fiji and Barbados.

A government's annual budget, with its spending plans and resource allocations, reveal its true priorities. When the Domestic Violence Act was approved in 1998 in South Africa, it meant a great improvement in the law, but it was clear that it would not make much difference in women's lives if the government was not going to commit enough resources to its implementation. An initiative led by the Community Agency for Social Enquiry (CASE, 1999) and the Gender Advocacy Programme (GAP) focused on analysing the work of key government departments directly responsible for the implementation of the Act and the related budgets. The research evidenced gaps and documents specifically in which areas resources are needed to implement the Domestic Violence Act effectively. This was an essential instrument to allow for specific budgetary allocations or a re-direction of spending to meet gender needs (CASE, 1999).

### **4.3.3 Civil society**

Civil society organisations have also been involved in the auditing of governments especially at local level. In Rajasthan, for instance, a small organisation called the Mazdoor Kisan Shakti Sangathan (Workers' and Peasants' Power Association) has introduced a system of local auditing carried out by civil society to ensure that government budgetary commitments, for example in areas of concern to women, are met.

The self-assessment reports signatory governments must submit often find a invaluable source of information in the work of civil society groups, which constantly monitor the progress of government and inter-governmental bodies in gender mainstreaming. This type of monitoring initiative can take place in different ways: the Asian Development Bank (ADB) gave technical assistance to projects which interpret data collected through official national surveys in order to come up with gender-sensitive indicators on the situation of women. Asian Pacific Resource and Research Centre for Women's (ARROW) Women's Access to Gender-sensitive Health Programmes Project has developed a Framework for indicators of action on women's health needs with indicators for each objective identified by BPA for the critical area of concern of women and health. The Coalition Against Trafficking in Women-Asia Pacific (CATW-AP) has developed a systematic databank to record information which can help NGOs retrieve essential data to support their claims concerning violence against women. It facilitates enormously the monitoring of women's progress in the area of human rights of women and violence against women (Licuanan, 1999).

### **Mechanisms to hold governments accountable for mainstreaming gender**

- Disaggregated statistics, performance indicators, expert scrutiny and regular public reporting. Transparency.
- Statistics disaggregated by gender, urban/rural residence, age, ethnicity, race, disability and other socio-economic variables
- Regularly reviewed qualitative and quantitative performance indicators. Properly estimated targets.
- Strengthen the role National Machineries to assist in the formulation of gender-sensitive performance indicators and in introducing gender analysis in government reports.
- Introduction of gender auditing systems and possibly of gender budgeting.
- Strengthen the relationship between National Machineries and civil society.
- Strengthen the participation of NGOs in review processes of National Machineries against performance indicators.

*Source:* Womenwatch, 1998

## 5 CONCLUSIONS AND RECOMMENDATIONS

Monitoring and evaluation (M&E) processes are essential mechanisms to track if targets are being met and to assess the impact of development projects, programmes and policies. In order for them to track changes on the situation of women and men and on their relations at household and community level and in society as a whole, they must be gender-sensitive.

This paper provides an analysis of gender-sensitive M&E mechanisms at different levels: at field, institutional and government level. A number of case studies and different experiences of organisations implementing such mechanisms have been illustrated. On the basis of such experiences and of the lessons learnt from them, some recommendations can be drawn:

- Indicators must be both qualitative and quantitative and include contextual factors
- Wherever possible, indicators should measure empowerment issues, e.g. changes in men's and women's attitudes, perceptions, practices and knowledge
- Indicators have limitations in that they do not provide information on gender relations, are subject to gender bias, and are rarely comparable internationally for lack of country-, language- or cultural-specificity
- Gender-disaggregated indicators are necessary, but not sufficient. They must be complemented by qualitative analysis and baseline data in order to track changes on gender relations
- M&E must happen at every stage of the project, programme or policy implementation cycle. M&E systems must be part of a gender-sensitive planning cycle and have clear objectives against which to measure results and changes
- M&E processes, including indicators, must be participatory, i.e. be designed in consultation with the target group
- M&E processes must be carried out in gender-sensitive ways. Collection and analysis of data is not gender neutral. Results can be influenced by gender bias derived from lack of gender awareness, cultural attitudes or social practices of the people involved in the process.
- Importance of gender training of NGO or government staff and of target groups involved in the M&E process
- Importance of extending M&E processes to measure progress of gender mainstreaming efforts within implementing agencies. There is a need for organisations to look at themselves critically in this process and commit the necessary resources and staff time.

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[http://www.worldbank.org/gender/t...tion/Tanzaniza\\_M\\_E/moneval3.html](http://www.worldbank.org/gender/t...tion/Tanzaniza_M_E/moneval3.html)

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## **APPENDIX 1 - METHODOLOGY**

Prior to the identification of the material and literature needed to write this paper, a consultation process was initiated with members of the GREAT network, an electronic network focusing on gender and development issues, with NGO practitioners and fellows of the Institute of Development Studies. The aim was to tap into their knowledge and expertise to identify key resources. A number of people and institutions were very helpful and I would like to thank them for suggesting me useful contacts and documents: Felicity Chancellor (HR Wallingford), Hettie Walters (G& D.T.C.), Jane Turner (Action Aid), Minke Valk (KIT), Nieves Rico (CEPAL), Soni Rana (MahilaWeb), Irene Sarasua (AWID), Jennie Richmond and Aidan Timlin (Christian Aid), Sabine Hausler (GTZ), Andrea Cornwall, Anne-Marie Goetz and Ramya Subrahmanian (IDS), Floris Blankenberg (SNV), Elsa Dawson (Oxfam) and independent development practitioners Tina Wallace, Jon Cloke, Irene Guijt, Sarah Murison.

An extensive search of Internet resources was also undertaken. In particular, the websites of multilateral development agencies proved to be particularly useful especially when identifying resources on monitoring and evaluation at government and institutional level.

Gender-sensitive monitoring and evaluation methodologies is a relatively new area, rarely tackled and documented by organisations and institutions. Where monitoring and evaluation mechanisms have been designed they are often illustrated in documents that are internal to the organisation that developed them and as such impossible to access. Moreover, many of the documents retrieved were either very general, or very technical, providing checklists on very specific areas and tasks. In particular, it was difficult to find documents on methodologies, whereas I found it easier to identify tools or results of reviewing processes, especially at institutional level. Also, it was relatively easy to identify material on gender-sensitive indicators.

## **APPENDIX 2 - CHECKLISTS**

The identified literature provides some examples of checklists, which are listed below, divided by thematic area.

### **INCOME AND EMPLOYMENT**

ILO, 1995, *Guidelines for the Integration of Gender Issues into the Design, Monitoring and Evaluation of ILO Programmes and Projects*, Evaluation Unit (PROG/EVAL), Bureau of Programming and Management, International Labour Office (ILO), available on-line at: <http://www.ilo.org/public/english/bureau/program/eval/guides/gender/annex1.htm>

The following checklists are included:

Gender considerations in Summary Project Outlines (SPROUTs) and Programme Documents (p.14)

Gender considerations in Progress Review Reports (p.19)

Gender considerations in Self-Evaluation Reports (p.20)

Gender considerations in Terms of Reference for Independent Evaluation Missions (p.23)

Licuanan, P.B., 1999, *Monitoring and Evaluation Strategies for the Empowerment of Women*, Panel IV of the High-Level Intergovernmental Meeting to Review Regional Implementation of the Beijing Platform for Action, Economic and Social Commission for Asia and the Pacific, available on-line at: <http://www.unescap.org/wid/meeting/licuanan.pdf>

Gender-sensitive indicators on women and the economy (p.54)

CIDA, 1997, *Guide to Gender-Sensitive Indicators*, Canadian International Development Agency (CIDA), Hull, Quebec, available on-line at: [http://www.acdi-cida.gc.ca/cida\\_ind.nsf/8949395286e4d3a58525641300568be1/7b5da002feaec07e8525695d0074a824?OpenDocument#top](http://www.acdi-cida.gc.ca/cida_ind.nsf/8949395286e4d3a58525641300568be1/7b5da002feaec07e8525695d0074a824?OpenDocument#top)

Indicators related to women, work and labour force participation and methodological problems with their use (p.79)

### **CONFLICT AND EMERGENCIES**

Licuanan, P.B., 1999, *Monitoring and Evaluation Strategies for the Empowerment of Women*, Panel IV of the High-Level Intergovernmental Meeting to Review Regional Implementation of the Beijing Platform for Action, Economic and Social Commission for Asia and the Pacific, available on-line at: <http://www.unescap.org/wid/meeting/licuanan.pdf>

Gender-sensitive indicators on women and armed conflict (p.54)

### **GOVERNANCE**

Licuanan, P.B., 1999, *Monitoring and Evaluation Strategies for the Empowerment of Women*, Panel IV of the High-Level Intergovernmental Meeting to Review Regional Implementation of the Beijing Platform for Action, Economic and Social Commission for Asia and the Pacific, available on-line at: <http://www.unescap.org/wid/meeting/licuanan.pdf>

Gender-sensitive indicators on women in power and decision-making (p.55)

## **SOCIAL DEVELOPMENT**

Walters, H., 1995, *Monitoring and Evaluation from a Gender Perspective. A Guideline*. Netherlands Development Organisation (SNV), Holland.

Checklist on Women and Health, including the general picture, women as health providers, women's health needs, access to health care services and facilities, participation in decision-making (p.67)

Licuanan, P.B., 1999, *Monitoring and Evaluation Strategies for the Empowerment of Women*, Panel IV of the High-Level Intergovernmental Meeting to Review Regional Implementation of the Beijing Platform for Action, Economic and Social Commission for Asia and the Pacific, available on-line at: <http://www.unescap.org/wid/meeting/licuanan.pdf>

Gender-sensitive indicators on education and training of women (p.52)

Gender-sensitive indicators on women and health (p.53)

Gender-sensitive indicators on violence against women (p.53)

CIDA, 1997, *Guide to Gender-Sensitive Indicators*, Canadian International Development Agency (CIDA), Hull, Quebec, available on-line at: [http://www.acdi-cida.gc.ca/cida\\_ind.nsf/8949395286e4d3a58525641300568be1/7b5da002feaec07c8525695d0074a824?OpenDocument#top](http://www.acdi-cida.gc.ca/cida_ind.nsf/8949395286e4d3a58525641300568be1/7b5da002feaec07c8525695d0074a824?OpenDocument#top)

Gender-sensitive education indicators and methodological problems with their use (p.73)

Gender-sensitive health indicators and methodological problems with their use (p.77)

## **NATURAL RESOURCES AND THE ENVIRONMENT**

Walters, H., 1995, *Monitoring and Evaluation from a Gender Perspective. A Guideline*. Netherlands Development Organisation (SNV), Holland.

Checklist on women, energy, forestry and the environment, including women's use of trees, energy crisis and forestry, and women's access to resources and opportunities (p.64)

Checklist on women, water and sanitation, including policy/attitudes; baseline; participation and workload; entry points; construction, maintenance, management and actual use, steps towards women's involvement (p.70)

Fong, M.S., Wakeman, W. and Bhushan, A., 1996, *Toolkit on Gender in Water and Sanitation*, the World Bank, Washington, D.C., available on-line at: <http://www.worldbank.org/gender/know/water.pdf>

Terms of reference for gender analysis during monitoring and evaluation (p.96)

Licuanan, P.B., 1999, *Monitoring and Evaluation Strategies for the Empowerment of Women*, Panel IV of the High-Level Intergovernmental Meeting to Review Regional Implementation of the Beijing Platform for Action, Economic and Social Commission for Asia and the Pacific, available on-line at: <http://www.unescap.org/wid/meeting/licuanan.pdf>

Gender-sensitive indicators on women and the environment (p.57)

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Gender-sensitive indicators related to water supply