

AFRICAN DEVELOPMENT BANK GROUP



WORKING PAPER

MAINSTREAMING GENDER EQUALITY:

A ROAD TO RESULTS OR A ROAD TO NOWHERE?

AN EVALUATION SYNTHESIS

**OPERATIONS EVALUATION DEPARTMENT
(OPEV)**

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OR
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The views and interpretations expressed in this paper are those of the authors and do not necessarily represent those of the African Development Bank or the Operations Evaluation Department.

***“We’re on a road to nowhere
Come on inside.
Takin’ that ride to nowhere
We’ll take that ride.”¹***

Talking Heads: Road To Nowhere² (1985)

¹ Byrne, D., Weymouth, T., Frantz, C., and Harrison, J. (1985)

² Cover Photo: “A Road to Results or A Road to Nowhere?”, Northern Kenya 2003. © Lee Alexander Risby

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Abbreviations

ADB	Asian Development Bank
AfDB (“Bank”)	African Development Bank
AusAid	Australian Agency for International Development
BMZ	Federal Ministry for Economic Cooperation and Development
CASCR	Country Assistance Strategy Completion Report
CIDA	Canadian International Development Agency
DAC	Development Assistance Committee (OECD)
DFID	UK Department for International Development
DPO	Development Policy Operation
EC	European Community
GAD	Gender and Development
GAP	Gender Action Plan
GBS	General Budgetary Support
GE	Gender Equality
ICR	Implementation Completion Report
ILO	International Labor Organization
IOM	International Organization for Migration
MDG	Millennium Development Goals
M&E	Monitoring and Evaluation
NGO	Non-Governmental Organization
NIBR	Norwegian Institute for Urban and Regional Research
Norad	Norwegian Agency for International Cooperation
OECD	Organization for Economic Cooperation and Development
OPEV	Operations Evaluation Department
PBL	Policy-based Lending
PRBS	Poverty Reduction Budget Support
PREM	Poverty Reduction and Economic Management Network (World Bank)
PRS	Poverty Reduction Strategy
PRSP	Poverty Reduction Strategy Paper
RBM	Results-based Management
RGC	Regional Gender Coordinator (World Bank)
SDA	Social Development Advisor (DFID)
SDC	Swiss Development Cooperation
SIDA	Swedish International Development Cooperation Agency
SWAp	Sector-Wide Approach
UNDP	United Nations Development Programme
UN ECOSOC	United Nations Economic and Social Council
UNFPA	United Nations Population Fund
UNHABITAT	UN Human Settlements Program
UNICEF	United Nations Children’s Fund
USAID	US Agency for International Development
WID	Women in Development
WFP	World Food Program

1. MAIN CONCLUSIONS AND OPTIONS

This chapter presents the main conclusions and suggested options for gender equality and women's empowerment in development interventions and organizations, drawing the findings and discussions presented in chapters 4 and 5.

1.1 Introduction

Since the Beijing Fourth World Conference on Gender and Development in 1995, the majority of multilateral and bilateral donors have put in place gender policies and/or strategies to promote equality in the design and delivery of development assistance to partner countries. Mainstreaming has become the ubiquitous process through which donor organizations have attempted to integrate gender into development analysis, country dialogue, sectors, and operations, with the aim of making gender “everyone’s business,” and therefore leading to improved gender equality results and more equitable and sustainable development. The central conceptual heart of gender mainstreaming is³:

“...that questions of gender must be taken seriously in central, mainstream, “normal” institutional activities and not simply left in a marginalized, peripheral backwater of specialist women’s institutions.”

From the mid to late 1990s until 2010, gender policies and mainstreaming processes have been the subject of more than 25 thematic and country evaluations by multilateral and bilateral agencies. Some organizations, such as the Asian Development Bank (ADB), the Norwegian Agency for International Cooperation (Norad), the Swedish International Development Cooperation Agency (SIDA), World Food Program (WFP) and the World Bank have conducted multiple evaluations of gender over the last decade, allowing for opportunities to assess trends in evaluation findings and in management responsiveness to evaluation. Individual evaluations have shown that mainstreaming has not succeeded in making gender everyone’s business, and that gender equality results have been fragmented and not scaled up. Furthermore, many of the evaluations have been conducted in isolation, and with the exception of the Norad synthesis of eight organizational evaluations completed in 2006,⁴ have lacked a broader comparative assessment of findings across organizations. Currently, there is a strong informal perception that mainstreaming gender equality is consistently underperforming across the majority of donor organizations. However, in the absence of a comprehensive synthetic review, such perceptions are not sufficient to establish general root causes and thus to influence policy or operational change strategies. This gap in evaluative knowledge needs to be filled.

In response to the “evaluative gap,” this synthesis intends to build on overview provided in the Norad (2006) study, by making a comprehensive assessment of gender evaluations conducted by donor agencies between 1990 and 2010. The results of the synthesis will

³ Charlesworth (2005: 3).

⁴ Norad (2006).

provide the Bank and other stakeholders with a clear overview of the challenges and good practices at an organizational level; as well as future options for gender mainstreaming.

This analysis comes at a time when multilateral interest in gender equality is rising again with the creation of UN Women in 2010,⁵ and with the forthcoming 2012 *World Development Report on Gender Equality and Development*.

1.2 Conclusions

Conclusion 1: Leadership has not consistently supported the implementation of gender mainstreaming policy, resulting in what has been widely described as “policy evaporation.”

Mainstreaming requires change. Organizational culture must break with old ways of thinking and acting, and accept and act on new concepts. Importantly, mainstreaming also needs resonate sufficiently with the past and present organizational *raison d'être* to be accepted. Senior management must demonstrate leadership and commitment over time for a policy or strategy to be mainstreamed; and this commitment must be supported by the necessary resources, incentive, and accountability systems. A key challenge to mainstreaming gender equality in donor organizations has proved to be the failure of senior management to move beyond policy rhetoric and to actively commit to the concept, to put in place organization-wide systems and resources necessary to make gender “everyone’s business” (see 4.2).

The underlying reasons for failure are often related to competing leadership priorities. The Millennium Development Goals (MDGs), aid effectiveness, and governance agendas, to name a few, have crowded out gender mainstreaming. Furthermore, senior management are often most responsive to those priorities that receive the most international attention and resources, and so offer rewards and career enhancement.

Conclusion 2: The absence of accountability and incentive systems to systematize the integration of gender equality across organizations and interventions has limited the achievement of results.

The evaluations strongly emphasized the absence of accountability and incentives systems at the organization-wide level as a key factor limiting the integration of gender equality into organizational processes and interventions, and therefore inhibiting the attainment of results (see 4.4).

However, it is important to note that discussion about the effects of such systems is almost entirely hypothetical. In practice, these systems do not seem to exist in a coherent form, and for this reason the status they have acquired as a solution to the broad failure of gender mainstreaming should be approached with caution, until such systems are put in place and can be evaluated.

Conclusion 3: Financial and human resources have not been sufficient to enable effective mainstreaming of gender equality within donor organizations and interventions.

⁵ UN Women was created in 2010 to bring together the various organizational resources focusing on gender equality and women’s empowerment within the UN system.

Evaluations show that mainstreaming is not a financial or resource-free process. Donor organizations have not devoted sufficient resources to support gender mainstreaming. The lack of resources is largely a symptom of the inconsistent or absent leadership focus on gender equality (see 4.3).

Human resources, in terms of the numbers of gender specialists, have been cut or remained at a low level within many donor organizations. Responsibility for gender equality has often been relegated to consultants, or junior or part-time staff, who lack the ability to influence either policy dialogue or operational staff in the design, implementation, and monitoring and evaluation of interventions. Many evaluations were unable to identify financial/budgetary allocations for gender mainstreaming at either the headquarters or intervention level, as such information was not available or tracked. Frequently, budgetary allocations for monitoring gender equality components in project interventions were lacking, contributing to lack of results reporting and learning.

Conclusion 4: Many procedures and practices have been introduced following the adoption of new gender policies or strategies, but have been actively pursued for only a short period before gradually declining in use.

The most common organizational approach to supporting gender mainstreaming has been to develop procedures and practices such as Gender Action Plans (GAPs), gender analysis, toolkits, manuals, checklists, and staff training. Evaluations found, however, that few of these are used systematically, because of the lack of incentives or rules mandating their use. Hence, the use of gender mainstreaming procedures and practices often depends on individual country and sectoral contexts and the choices of operational staff (see 4.1).

Experience and derived good practice show that procedures such as GAPs and gender analysis can be effective if they are integrated throughout the design, implementation, and monitoring of the intervention. Presently, these procedures tend to be confined to particular sectors such as education and health, where opportunities for gender-sensitive approaches are more self-evident to operations and partner governments. Cross-sectoral learning and organization-wide adoption have been limited, and this has been attributed to the lack of supporting organizational systems, particularly accountability and incentive mechanisms.

Training has been largely reported to be ineffective in raising awareness and improving the knowledge necessary for gender-sensitive approaches. This is because training has been delivered using a “one-size-one-shot fits all” approach, with little tailoring to local country or sectoral contexts. Further, resources have not been consistently targeted at providing training; the few gender specialists are overburdened with responsibilities; senior management and non-gender specialist operational staff often avoid gender training, citing heavy workloads and other priorities.

Earlier evaluations of organizational responses to women in development (WID) initiatives in the 1980s and early 1990s indicated that similar sets of procedures and practices were developed, and that they encountered similar challenges.

Conclusion 5: Results reporting and learning have been seriously challenged by inconsistent approaches to monitoring and evaluation of gender mainstreaming.

One of the most common findings reported by the evaluations has been the lack of monitoring and evaluation (M&E) and supervision systems within donor organizations to track progress, allow for adaptive management, record gender equality results, and document good practices (see 4.5).

Even when gender equality and analysis are integrated at the design stage of interventions, the focus on gender is often not continued into implementation and monitoring because of lack of financial and/or human resources. Gender is often included in project design to satisfy bureaucratic requirements for approval and then dropped during implementation, as operational staff focus on the main priorities of the intervention. This situation often creates a vicious cycle—lack of monitoring leads to invisibility of gender results, which feeds back into a lack of awareness and interest in promoting gender equality in future interventions.

Many evaluation findings show that where results are reported, they tend to be focused on: (a) women and not on gender, indicating that in practice a gender equality approach is reduced to WID; and (b) the education and health sectors, because it is easier to monitor and evaluate effects on women and gender in these areas. However, with regard to (b), the transfer of these operational experiences to other sectors has generally not taken place. Instead of being mainstreamed, gender equality has become focused on specific sectors.

The evaluations also found that evaluations themselves often have failed to systematically incorporate gender into the body of evidence. Outside of specific thematic gender evaluations, evaluation offices have tended to place gender on their list of topics for occasional coverage rather than systematically integrating into all their streams of work (see 5.1).

Conclusion 6: Integrating gender equality into new aid modalities presents many new challenges to donor organizations.

The emerging evaluative data on integrating gender equality into new aid modalities such as policy-based lending (PBL), general budget support (GBS), and sector-wide approaches (SWAs) indicates that gender is not being mainstreamed systematically into these types of interventions. SWAs focused on education, health, and social safety net sectors report better integration of gender concerns than other sectors and types of modalities, for same reasons as traditional project-based interventions in these sectors (see 5.1).

The emerging challenges in gender mainstreaming relate to (a) inconsistent ownership of gender within partner governments, which results in it being given a low priority in poverty reduction strategies and country policy dialogue; (b) lack of donor harmonization around gender issues, resulting in inconsistencies in policy discussions and the design of PBL, GBS, and SWA operations; and (c) lack of in-country gender expertise and tools to mainstream gender in policy dialogue and interventions, which makes it difficult for gender issues to gain “a place at the table.”

1.3 Options for Gender?

As substantial challenges have prevented gender equality from entering the mainstream, the evaluation evidence suggests that it may be time to consider different options (see Chapter 5):

Option 1: Gender focusing

This approach would focus on those sectors where gender equality appears to be sufficiently embedded and has made some progress, and attempt to create linkages with related sectors.

This approach largely would continue business as usual for most donor organizations and partner governments, as it would emphasize education and health projects or SWAps focused on women's empowerment and gender equality. Donors could then work with partner governments to add additional entry points for gender in other sectors, such as improvement of labor market policies and the enabling environment for investment, to breakdown gender-based discrimination in private sector development. This may enhance partner government support, as it would be part of a policy dialogue and intervention strategy designed to increase market competitiveness and economic development. Furthermore, increasing the emphasis on developing women's involvement and leadership in the corporate world would resonate strongly with debates and experiences in developed countries.

Option 2: WID plus

Many of evaluations have found that, in practice, when gender equality is integrated into country-level interventions, it is boiled down to a women-centered or women's empowerment approach. This option would make this approach strategically explicit, building on the experiences that did deliver results, but would incorporate more fundamental analysis of gender power structures, and seek to position interventions to empower women economically and politically. This would entail a return to a concentration on interventions that empower women (and men where appropriate) and facilitate incremental social change over time.

Option 3: Policy dialogue on gender equality in new aid modalities

Gender mainstreaming and women's empowerment have been aimed, at the operational level, at traditional project-based modalities. However, the increasing use of new aid modalities has created an additional set of challenges for integrating gender equality into interventions. Within the context of option 1, donor organizations and partner governments could enhance the consideration of gender equality and women's empowerment by focused policy dialogue and development in key sectors, such as education and health, private sector development, and the investment enabling environment. Policy-based lending could be used to enhance gender dialogue around reforms in specific sectors such as finance and extractive industries. SWAps could continue to build from a position of strength in the education and health sectors to support longer-term enhancements in human capital and equitable economic development.

Option 4: Improving results reporting and learning through more systematic integration of monitoring and evaluation

Improving results and learning within organizations depends on enhanced M&E within the context of the options outlined above. Gender monitoring would be strengthened in those sectors where gender equality and women's empowerment are the focus. Gender could be

integrated more broadly across all evaluative activities to uncover unintended results, enhance cross-sectoral learning, and reduce blindness.

2. EVALUATION SYNTHESIS FRAMEWORK

This chapter outlines the objectives, scope, methodology and limitations of this evaluation synthesis report.⁶

2.1 Objectives

The objectives of the evaluation synthesis are to:

- Examine experiences in mainstreaming gender equality across multilateral and bilateral donor organizations, and in so doing,
- Highlight trends (commonalities and differences) in findings, challenges faced and good practices.

2.2 Scope

The scope of the synthesis was guided by the following considerations:

- *Time period:* From 1990 to 2010. in order to capture trends (similarities and differences) in findings and good practices from the women-in-development (WID) era to the current emphasis on gender and development (GAD);
- *Evaluation type:* Primary emphasis was on thematic and country evaluations that had a specific focus on gender and/or women;
- *Stakeholder consultation and demand:* The synthesis approach paper was circulated for discussion within the Bank in spring 2010, and comments were used to focus on key issues of concern, such as good practice in mainstreaming processes.

Evaluations carried out by the African Development Bank were not included in the review because no gender evaluations have been commissioned or conducted. Furthermore, it was beyond the purpose of the evaluation synthesis to make any judgment on the Bank's performance, as the focus was on synthesizing existing evaluative data and not on collecting and analyzing primary data from within the organization.

2.3 Methodology

The approach followed well-established methodological guidelines⁷ for conducting syntheses of evaluative studies:

Selection of objectives: A pre-synthesis review was conducted of existing non-evaluative and evaluative data,⁸ together with consultations with Bank gender and results-based management

⁶ Evaluation synthesis is an approach in which an evaluator looks across interventions addressing a similar issue or theme to identify commonalities.

⁷ GAO (1992); Morra-Imas and Rist (2009: 201 – 202).

⁸ Brouwers and Hunt, OECD (2003); Norad (2006); Hafner-Burton and Pollack (2002; 2009); Mehra and Gupta (2006).

(RBM) specialists to identify key issues and objectives. The objectives were then reassessed and adjusted as the synthesis progressed. In this process, some issues, such as resources, accountability, and senior management influence or leadership, gained prominence. In contrast, reporting on results was given less prominence, since it had become clear that the severe monitoring and evaluation challenges encountered by development organizations seriously limit the quality of results reporting on changes in gender equality.

Data collection: A detailed online search of OECD-DAC's Evaluation of Development Programs database was initially used to identify evaluations; this search then was supplemented by further online searches of the evaluation publications of multilateral and bilateral donor organizations. In cases where a report was not downloadable or was available in summary only, the relevant evaluation office was contacted to obtain the full report.

Screening: The initial data collection provided approximately 100 evaluations. These were then screened down to 26 evaluations (see Annex 2)⁹ focused specifically on gender equality, mainstreaming and/or women in development at the thematic and organizational-wide levels.

Other thematic evaluations, such as those focusing on education, health, and agriculture were excluded, since they had insufficient focus on gender. Individual gender and/or WID-focused project evaluations were also excluded, since the review sought thematic gender evaluations, preferably including country or project cluster case studies. This was in keeping with the intention to go beyond localized and specific project-based evaluation findings to look at the broader context of gender equality and mainstreaming within the development field.¹⁰ Reviews and self-evaluations conducted by management or operations teams were excluded as having insufficient independence. Academic and non-evaluative studies were omitted. Non-English, and particularly French language thematic evaluations were sought to include in the synthesis, but none was located.

Review protocol: A protocol was developed to record basic information about the evaluations, such as organization, time period, and methodology, and also to collect and summarize key information relating to findings, lessons/good practices, and recommendations.¹¹ The protocol was initially tested on five evaluations to ensure it was appropriate, and some adjustments were made. These included adding sections on "evidence base" and "reviewer comments" relating to methodological and quality issues. Evaluation quality was not formally assessed, although the reviewers assessed the amount of desk (secondary) and field and survey (primary) data collection, such as the number of project or country case studies on which evaluation findings were based.

⁹ Note that country case studies, if they were part of thematic documents but produced as separate documents, were also reviewed. However, they were counted as part of the thematic evaluation, to avoid double counting.

¹⁰ Given the focus on non-Bank external evaluative data, the synthesis did not provide evaluative judgment on the past performance of the Bank with regard to gender mainstreaming.

¹¹ Title, organization, date of publication, timeframe under evaluation, evaluation type, evaluation goal(s) and objectives, evaluation methodology, findings, lessons/good practices, recommendations, results basis and definition, mainstreaming definition, evidence base for the evaluation, and reviewer comments.

Analysis: On the basis of the definition and principles of gender mainstreaming, and the review of donor organization reports, the reviewers devised a generic theory of change. The reports were then subjected to qualitative content analysis using codes developed from the theory of change (see Box 1). After coding was completed and the relative prominence of different issues was established, report drafting commenced.

Box 1. Content Analysis Codes

Mainstreaming

Senior management / leadership committed
Gender specialists influencing projects and programs
Financial resources available
Human resources available
Gender sensitivity and equality institutionalized in country / field offices
Gender sensitivity and equality institutionalized in partner governments
Incentives and accountability

Mainstreaming Activities and Tools

Policy and / or strategies in place
Plans of action in place
Gender analyses used in design / implementation of projects or programs
Checklists / screening
Guidelines
Good practice notes
Training programs
Toolkits
Gender sensitive monitoring frameworks
Gender sensitive evaluation

Challenges / Opportunities

New aid modalities
Infrastructure
Private sector investment
Policy evaporation
Focus on women (back to WID)
Understanding mainstreaming

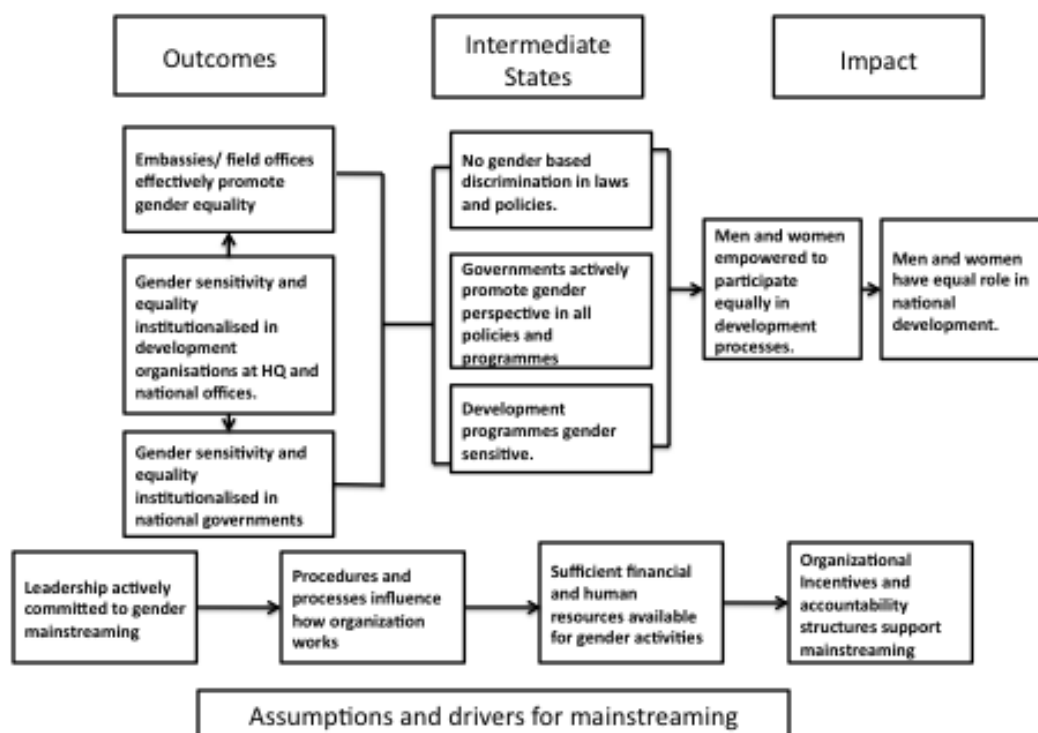
2.4 Theory of Change for Mainstreaming Gender Equality

The theory of change approach is an evaluation tool that maps out the logical sequence of means-ends linkages underlying a project, program, or approach. This begins by defining the intended impact of the process, and then moves toward the outcomes that mainstreaming activities aim to directly deliver. Having identified the beginning and end of the results chain, the theory then identifies the stages that must be passed through to move from the outcomes to achieving those impacts. Finally, the theory incorporates the assumptions that need to hold true if progress is to continue; and the forces that must be active to drive the whole process forward. These are labeled “impact drivers.” In effective projects or processes impact drivers are frequently also described as assumptions that need to hold true in order to move towards

impacts.

The theory of change (Figure 1) was developed early in the synthesis process, based on the definition and principles of mainstreaming laid out by the UN Economic and Social Council (UN ECOSOC). This theory was used in the desk review of evaluations, to (a) assess progress along the causal pathways toward the intended impacts of mainstreaming; and (b) simplify the process of identifying the effects of assumptions and impact drivers, with a particular focus on screening the data for confirming or disconfirming evidence of drivers and assumptions that need to hold for mainstreaming to deliver outcomes and impacts. As a basic principle, if impact drivers are not present, the approach is unlikely to produce impacts.

Figure 1. Theory of Change for Gender Mainstreaming



The theory of change identifies four key assumptions or drivers that need to be present to achieve the mainstreaming of gender equality: (a) effective leadership, (b) adequate financial and human resources, (c) availability of appropriate procedures and processes, (d) and appropriate organizational incentives and accountability structures. The evidence on the extent to which these assumptions were actively addressed through promotion of corresponding impact drivers was assessed under an overarching structure of content codes (see Box 1).

2.5 Limitations

Despite the substantial evaluative data on donor approaches to gender equality and mainstreaming, the synthesis evaluation encountered two significant and related limitations. First, the reporting on results and good practices was uneven, as most organizations do not have gender sensitive monitoring and evaluation systems in place to systematically record

outcomes or document good practice. Second, with the paucity of results data, most evaluations had little choice but to focus on processes and organizational factors relating to policy implementation and mainstreaming. Therefore, there was a substantial bias toward process (as opposed to results) reporting—although this proved to be useful in view of the inextricable linkage between processes and the delivery of results.

In light of these limitations, the original objectives of the review with regard to documenting results were scaled back; instead, after an initial piloting of the protocol for assessing and extracting data from evaluation, the decision was made to concentrate on the assumptions and drivers that need to be present, according to the theory of change, in order to move toward results.

3. CONTEXT AND CONCEPTS: A BRIEF OVERVIEW OF GENDER MAINSTREAMING

This section provides a historical overview of gender and development (GAD), starting with its roots in the women in development (WID) movement in the 1970s, through to the current emphasis on gender mainstreaming. The first two sub-sections cover issues that are well documented; the discussion draws from existing literature¹² and is not intended to add new perspectives or be exhaustive. The final section briefly discusses the development of gender mainstreaming.

3.1 Women in Development (WID): The Starting Point

The concept and practical use of women in development (WID) emerged in the early 1970s in reaction to the perceived exclusion of women from development interventions. Impetus came from the emergence of the feminist movement¹³ and the publication of Boserup's¹⁴ influential work on women and economic development.

Under WID, women were perceived as neglected economic resources who had been ignored or sidelined into the “non-productive sector” as caregivers and housewives. WID advocates argued that if women were incorporated into development processes, they would improve a country's economic development. WID was adopted across donor organizations and NGOs, and fed into the design of such project interventions as micro-credit, education, and technology, for the purpose of improving the status and livelihoods of women. Micro-credit projects were often designed and implemented with a strong WID focus, especially by NGOs such as the Grameen Bank, which aimed to increase the productive roles of women. Although WID placed much-needed attention on the role of women in development processes, it did not challenge existing gendered social structures or threaten fundamental change to male dominance and power. As a result, women's projects were often promoted in isolation or as special interest sub-projects bolted on to traditional development interventions.

Many donor organizations such as the World Bank and USAID created WID units or departments to integrate women into projects. This was not without problems and internal resistance, as USAID's experience from the 1970s illustrates:

“Although the WID office is charged with a broad mandate to integrate women through project review, studies, linkage with constituents, and international coordination, its annual program budget had been limited to one million dollars or less since inception. The WID office is constrained in its structural location to an exhorter role, rather than as a supplier of technical assistance or project monies. Monitoring is extraordinarily difficult, and the data produced are not

¹² See, for example, Rathgeber (1989); Razavi and Miller (1995); Charlesworth (2005).

¹³ The term “women in development” was coined in the early 1970s by the Women's Committee of the Washington DC Chapter of the Society for International Development, a network of development professionals.

¹⁴ Boserup's (1970) research showed that women were intimately involved in agricultural production, and therefore debunked the commonly held belief that women were primarily caregivers and homemakers.

always reliable, due to dependency on resistant field missions for whom paper compliance is a developed art. Overlaying all this is the tokenism which all women WID staff faces in a male-dominated bureaucracy."¹⁵

The WID approach was increasingly criticized because it did not attempt to change existing socio-cultural gender biases. Furthermore, female-focused projects did not always result in improved economic conditions, even for the women themselves. For example, most income-generating projects were found to be ineffective,¹⁶ and women-focused production/technology projects often added to rather than eased women's workloads and involved trade-offs with other responsibilities.¹⁷ As a result, by the mid-1980s (GAD) had emerged as the successor to WID, with an underlying platform of explicitly challenging gender imbalances.

3.2 Gender and Development: From WID to GAD

The criticisms of WID led to the development of the concept of gender and development, which donor organizations adopted as a central element of their approach to development. GAD, in contrast to WID, does not concentrate its attention exclusively on women, but examines the social construction of gender and the assignment of specific roles, responsibilities, and expectations to women and to men. The GAD approach aims to understand the power dynamics between men and women in different contexts arguing that it is only by understanding gender power relations that development can empower women and thereby create positive and sustainable socio-economic change (see Table 1).

GAD places critical importance on the use of gender analysis to gather and analyse information on social roles based on gender, in order understand and redress gender-based inequities through development interventions.

Critiques of GAD have argued that despite its conceptual power, it has been practically applied in donor organizations in ways similar to WID, with a primary focus on women through similar interventions such as micro-credit, education and health¹⁸ while less attention is given to the longer-term goal of challenging gender-based inequalities. In such interventions, gender has become a synonym for women,¹⁹ with little substantive analysis of or investment in redressing gender inequalities between men and women (see chapters 4 and 5).

¹⁵ Staudt (1981) – Staudt identifies a similar set of constraints that have been repeated 30 years later in attempts to institutionalize GAD through gender mainstreaming (see Chapter 4)

¹⁶ Rathgeber (1989: 20 – 22)

¹⁷ Razavi and Miller, 1995: 13)

¹⁸ Many of the more recent evaluations of gender mainstreaming also reinforce this issue.

¹⁹ Charlesworth (2005: 14 – 15) and <http://www.bridge.ids.ac.uk/reports/re55.pdf> : 33

Table 1. WID versus GAD

Description	WID	GAD
Approach	Takes situation of women as problem to be alleviated or redressed	Sees inequitable gender roles as a hindrance to development
Focus	Women	Gender based roles
Problem	The exclusion of women from development processes	Unequal power relations (rich and poor; women and men) that prevent equitable development
Goal	More efficient, effective development	Equitable sustainable development with both men and women as decision-makers
Solution	Integrate women into development processes	Empower the disadvantaged and women to transform unequal relations
Strategies	Women's projects; women's components in projects; increase women's productivity; increase women's income; increase women's ability to look after the household	Identify/address practical needs determined by women and men to improve their conditions. At the same time, address inequality affecting women; address strategic interests of the poor through people-centred development

Source: World Bank (1998: 6), reproduced in Hafner-Burton and Pollack (2002: 349).

GAD, with its fundamental goal of equality and challenge to male dominance, has been viewed as a more conflictual and threatening approach than WID, as it can result in resistance and conflict within donor organizations and development interventions (see chapters 4 and 5). In response to these criticisms, the mainstreaming agenda aims to encourage more general acceptance and implementation of gender-equitable approaches across donor organizations and interventions, and thus to push beyond an exclusive focus on women.

3.3 Getting Gender into the Mainstream

“Whereas the mainstream is the old order, mainstreaming seeks a new order.”²⁰

The term “mainstreaming” has its origins in approaches to education that include a diversity of learning abilities, rather than segregating or excluding those who have disabilities²¹ from “normal” education.

Mainstreaming suggests changes in the established procedures and cultures of organizations, so that the “old mainstream” is transformed as new concepts and ways of doing business are accepted. The process of mainstreaming implies flexibility, innovation, learning, and

²⁰ Picciotto (2002: 323).

²¹ Ibid: 2 and [http://en.wikipedia.org/wiki/Mainstreaming_\(education\)](http://en.wikipedia.org/wiki/Mainstreaming_(education)).

acceptance of new cultural norms. However, these may not be readily embraced by the existing mainstream, so the change process is often subject to resistance.²² This can lead to significant policy dissonance between high-level statements of intention to create a new mainstream and actions taken to do so—what is often referred to as policy evaporation.

The concept of mainstreaming was first used in reference to gender at the Third World Conference on Women, which took place in Nairobi in 1985.²³ Strategies for the “advancement of women” called for “effective participation of women in development to be integrated in the formulation and implementation of mainstream programs and projects.”²⁴ By the time of the Fourth World Conference on Women, held in Beijing in 1995, gender mainstreaming had become the key process and strategy to address gender inequity across not only the health and education sectors, but also the economic development, governance, and human rights sectors, as well as in all levels of decisionmaking. The UN Economic and Social Council (ECOSOC) has formally defined gender mainstreaming as follows:

“Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality”²⁵

After Beijing, mainstreaming was endorsed and adopted by nearly every multilateral and bilateral donor organization and most governments, and became the central axiom of GAD. ECOSOC outlined the principles to follow in mainstreaming gender processes in the UN system²⁶:

- Issues across **all areas of activity** should be defined in such a manner that gender differences can be diagnosed—that is, an assumption of gender-neutrality should not be made.
- Responsibility for translating gender mainstreaming into practice is system-wide and rests at the **highest levels (senior leadership)**. **Accountability** for outcomes needs to be monitored constantly.
- Gender mainstreaming also requires that every effort be made to broaden women’s participation at all levels of **decisionmaking**. Gender mainstreaming must be institutionalized through concrete steps, mechanisms, and processes in all parts of the United Nations system.

²² See Picciotto (2002) for a comprehensive discussion on the meaning and processes of mainstreaming.

²³ See Hafner-Burton and Pollack (2002: 340–342) for a comprehensive discussion of the rise of gender mainstreaming in global governance.

²⁴ UN (1985: 114).

²⁵ UN (1997: A/52/3.18). United Nations. "[Report of the Economic and Social Council for 1997](#)". September 1997.

²⁶ Ibid: supra note 21, at 24.

- Gender mainstreaming does not replace the need for targeted, women-specific policies and programs or positive legislation, nor does it substitute for **gender units or focal points**.
- Clear **political will** and the allocation of adequate and, if need be, additional **human and financial resources** for gender mainstreaming from all available funding sources are important for the successful translation of the concept into practice.

The ECOSOC principles made clear that for mainstreaming to be effective, it needed to be backed by resources and leadership, combined with the application of specialist knowledge across organizations centrally and in country offices:

“A combined strategy can be particularly powerful. This involves the synergy of a catalytic central gender unit with a cross-sectoral policy oversight and monitoring role, combined with a web of gender specialists across the institution. The building of alliances both within the institution and with outside constituencies, such as women’s organizations, is crucial for success. Mainstreaming tools include gender training, introducing incentive structures which reward efforts on gender, and the development of gender-specific operational tools such as checklists and guidelines.”²⁷

In light of the MDGs, and particularly MDG3, the link between gender mainstreaming and economic development has been an increasing area of focus, particularly by the World Bank as part of “smart economics”—i.e. the idea that inefficiencies caused by the exclusion of women from economic development result in impaired economic growth and poverty reduction:

“To promote economic development and attain the MDGs—especially the overarching poverty reduction MDG and the gender equality MDG—the global community must renew its attention to women’s economic empowerment and increase investments in women. Gains in women’s economic opportunities lag behind those in women’s capabilities. This is inefficient, since increased women’s labor force participation and earnings are associated with reduced poverty and faster growth; women will benefit from their economic empowerment, but so too will men, children and society as a whole. Women’s lack of economic empowerment, on the other hand, not only imperils growth and poverty reduction, but also has a host of other negative impacts, including less favorable education and health outcomes for children and a more rapid spread of HIV/AIDS. In sum, the business case for expanding women’s economic opportunities is becoming increasingly evident; this is nothing more than smart economics.”²⁸

By strengthening the link between economic development and gender equality, the World Bank has implicitly sought to strengthen the rationale for mainstreaming, and thus to make it more appealing to the majority of its staff, who are economists.

4. GENDER MAINSTREAMING: INTENTIONS AND PRACTICE

²⁷ <http://www.bridge.ids.ac.uk/reports/re55.pdf>: 12.

²⁸ World Bank (2007: 2).

“...bridging the gap between policy and implementation continues to be an uphill climb. Despite progress, no agency fully matches its own political rhetoric and objectives on gender equality with the required human and financial resources or accountability measures to ensure progress toward gender equality and women’s empowerment.”²⁹

OECD 2007: 7

This chapter presents the key findings from the evaluation review. The findings cover the change drivers needed to (a) achieve intermediate outcomes in gender mainstreaming; and to (b) move from outcomes to gender equality results/ development impacts. The findings are divided into four issues—procedures and practices, leadership, human and financial resources, and accountability and incentives—are discussed in turn below. However, the evaluative data show that these factors cannot be considered in isolation from one another, but are dynamically related. We have flagged those relationships where relevant. A final section addresses the issue of results reporting on gender mainstreaming.

4.1 Procedures and Practice

Summary

This section addresses the procedures and practices of gender mainstreaming and gender policy, which consist of an array of related tools and activities such as plans, manuals, guidelines, toolkits, checklists, training, and monitoring and evaluation.

Many procedures and practices have been introduced to assist, during the WID phase, with incorporating women into development activities; and more recently, during the GAD phase, to help facilitate gender mainstreaming. The majority of these procedures and practices were introduced following the adoption of new gender policies or strategies, and were actively pursued for only a short period before declining in use. As a result, the link between the use of these tools and improved gender equality in development organizations has rarely been systematically established. Experiences and derived good practice show that tools such as gender action plans (GAPs) and gender analysis can be effective if they are integrated throughout the design, implementation, and evaluation process. However, these tools tend to be fragmented or confined to particular sectors, such as health and education,³⁰ with limited cross-sectoral learning and adoption due to the absence of incentives and accountability systems.

In large part, evaluations have reported that staff at all levels feel a sense of “policy and procedure overload,” and are therefore unable to pay detailed attention to all of the institution’s stated priorities. This results in a focus on “essential” priorities such as poverty reduction, and on those currently at the forefront of policy discussions. Gender is rarely seen as a top priority—and even if it is, then not for long.

Action Plans

²⁹ OECD (2007).

³⁰ See experience of ADB (2009; 2010) and World Bank (2010).

In recent years, GAPs have become one of the most common methods use to implement gender policy and promote gender mainstreaming the design and implementation of donor-assisted activities. However, the evaluations showed that the adoption of GAPs has not been universal. Many bilaterals and some UN agencies preferred to mainstream gender into existing planning frameworks, although the results of this approach have been inconsistent at best.³¹ In some organizations, such as the World Bank, GAPs have been implemented in response to past policy implementation failures.³² However, the emerging evaluative evidence indicates that GAPs themselves have not consistently produced the intended benefits. This is partly due to the lack of appropriate results orientation, resources, and incentive structures to encourage consistent use of GAPs.³³ As an example, AusAid introduced its first GAP in 2001. This was updated in 2002 and was unevenly used within the organization, until the Second Gender and Development Action Plan, introduced in 2008, made it mandatory to carry out monitoring and annual reviews of GAPs used in programs.³⁴ The AusAid system of linking planning and accountability to implementation represents an emerging good practice with respect to ensuring that GAPs become useful operational tools for achieving gender equality results.

Many evaluations noted that GAP targets remain oriented toward inputs and outputs rather than to outcomes. Furthermore, as shown by the experience of the ADB, it remains a challenge to link GAPs prepared during project design to the priorities of implementation, M&E, and supervision. Accountability for implementing the GAP is often not clearly established; and even when it is, the necessary capacity within the organization takes time to develop.³⁵ In such circumstances, opportunities for effective tracking and learning from results are minimal.

Seven of the donor organizations included in the evaluation review—including BMZ,³⁶ CIDA, and DFID—have not formally adopt the underlying structure offered by GAPs—but opted instead to attempt to mainstream gender into existing planning frameworks. Evaluations of CIDA³⁷ and DFID³⁸ assistance found:

“Lack of or incoherent strategy for rolling out GE [gender equality] initiatives, with no concerted plan of action clearly defining roles and responsibilities across the Agency, Headquarters and the field.” (CIDA)

³¹ See, for example, the experiences of CIDA (2008); DFID (2006a); EC (2003); SIDA (2010); UNDP (2006); and UNICEF (2008). However, UNDP and UNICEF have now switched to GAPs.

³² World Bank (2007).

³³ For an example of the lack of utilization of GAPs, see Norad (2009a: 4).

³⁴ AusAid (2002; 2008: 17; 27–28).

³⁵ ADB (2010: vii; 21; 24; 29); AusAid also reports a lag between the adoption of requisite accountability and performance measures and the development of organizational capacities.

³⁶ BMZ (2006: 7).

³⁷ CIDA (2008: xiii).

³⁸ DFID (2006a: 15).

“For the country and regional plans, policy evaporation is sometimes revealed in the weak mainstreaming of gender into background analyses guiding the plans, and in the plans themselves.” (DFID)

These experiences echo the results of earlier attempts made in the 1980s and early 1990s by Netherlands DGIS. The agency’s WID approach set in motion an ambitious agenda through its Women and Development Program of Action (1987), which included the posting of WID specialists in embassies, training of policymakers, and adoption of policy papers and sector and country plans. A 1991 evaluation found that, although the WID plans had been widely distributed, “in most cases the papers are familiar to the embassies and at the ministry, but they are not used. Project staff are not usually aware of the existence of the papers.”³⁹

In Norway, the adoption of a Gender Strategy in 1997 was followed by a GAP, but it did not fare well:

“The evaluation team cannot find the action plan in Norad’s archive. All information on this topic has been given to the evaluation team by a former gender advisor. There is no systematic documentation in the archive on what happened to the action plan. From the information we have received, the action plan was never revised and died a quiet death.”⁴⁰

The current interest in GAPs as a tool to reinvigorate the implementation of gender policy and mainstreaming has the potential to provide more effective integration of gender in programs and projects, at both the sector and country levels. However, the evaluation evidence indicates that such plans need to be linked to accountability mechanisms that make their use mandatory throughout the activity cycle.

Gender Analysis

Gender analysis is the basic tool for implementing gender policies and mainstreaming. It is currently undertaken mainly at the level of gender-specific target groups, to determine potential benefits and negative impacts. In contrast, more fundamental gender analysis looks at the structure of power relations in society and the relative position of men and women. Such analysis can determine whether interventions are supporting and targeting improvements in gender equality and, at a minimum, ensure that they do no harm. Although such work is known to provide a firm foundation for the design, implementation, and M&E of activities at the country level, 22 of the 26 evaluations indicated that the use of gender analysis was insufficient to effectively integrate gender into interventions. The prevalent challenge was the inconsistent use of gender analysis in the project cycle and across sectors. Analysis, if used at all, tends to be undertaken during project design, but is not followed up during implementation and monitoring. For example, while CIDA’s gender policy calls for “systematic inclusion of gender analysis” in the organization’s initiatives, an evaluation⁴¹ found that it was completely absent from 23 percent of interventions; and while 67 percent had some analysis, it did not meet policy requirements. Moreover, evaluation of the quality of

³⁹ Netherlands Ministry of Foreign Affairs (1998: 135).

⁴⁰ Norad (2005a: 30).

⁴¹ CIDA (2008: xv; 50–56; 84–88).

gender analysis showed that it was more frequently used to identify “a package of activities to improve women’s share as beneficiaries” than to assess differential effects by gender or to carry out risk assessments. It was therefore more appropriate for a WID perspective (see 4.5) than for gender mainstreaming. Furthermore, the analysis was primarily confined to intervention strategy and design and was not carried through into implementation, and hence did not figure in indicators or results reporting.

The CIDA analysis also found that a major causes of the uneven use of gender analysis were the excessive administrative burdens placed on project managers; and competing demands from within the organization, and from donors and partner governments, to address too broad a range of development issues.⁴² Other critical factors included lack of gender specialists and internal capacity to support project managers, and lack of dedicated budgeting for such analysis to be continued throughout the project or program cycle. Similar failures in the use of gender analysis, caused by resource, capacity and knowledge factors were reported in evaluations of gender in EC, UNICEF, BMZ, SDC, SIDA, UNDP, and WFP⁴³ during the decade up to 2010.

As part of a vicious cycle, the consistent lack of gender analysis promoted the view within some organizations that the issue is a “luxury,” “an add-on,” “a burden,”⁴⁴ or, as Norad noted, “a problem”⁴⁵ to be included in the project description but not necessarily in the project itself:

“In 2001-2002 Norad did identify private sector development (PSD) as an area for improved W&GE (Women and Gender Equality) efforts. A gender component was included in the common ToR for all PSD studies, but as a general rule W&GE was only addressed in the problem description, not in proposed activities.”

Overall, gender analysis has proven to be an element of mainstreaming that has been widely introduced but rarely implemented in consistently from design through implementation, although doing so would make a major contribution to improved results across interventions.

Toolkits, Handbooks, Manuals and Guidelines

Toolkits, handbooks, guidelines, and manuals are other common tools used for gender mainstreaming in development agencies. Most evaluations found such documents to be of good quality but used infrequently. For example, DFID produced a Gender Mainstreaming Manual (2002) that was evaluated as “an excellent resource document” and is freely available within and outside the organization. Nevertheless, the “DFID staff who were interviewed as part of the evaluation reported a lack of familiarity with and access to either DFID’s [material] or externally produced toolkits and manuals.”⁴⁶ Moreover, the “gender tools made

⁴² Ibid: 78 and 84.

⁴³ EC (2003: 29–34); UNICEF (2008: viii; xii; 21; 36–38; 47–49); BMZ (2006: 6); SDC (2009: 8–11; 26–27); SIDA (2010: viii–ix; 11; 16–17; 19); UNDP (2006: 15–16; 23–24); WFP (2008: ii–iii; 23–26; 49–50; 52–58). See also World Bank (2010: xiii; 26–29).

⁴⁴ EC (2003: 39); UNICEF (2008: 21); BMZ (2006: 6); SDC (2009: 87); DFID (2006: 48).

⁴⁵ Norad (2005a: 32).

⁴⁶ DFID (2006a: 38).

available by DFID do not meet knowledge needs expressed by staff.” The good intentions and high-quality materials produced as part of mainstreaming efforts, therefore, did not produce the intended results. Similarly, in Norad, the Gender Handbook did not lead to coherent activity⁴⁷:

“A Handbook on Gender and Empowerment Assessment was published in 2000, and systematic training sessions took place in 1999-2000. No other tools and methods have been developed, and little analytical work has been carried out in MFA (Ministry of Foreign Affairs) or Norad on how to mainstream gender concerns and work on W&GE in the new aid structure and new aid modalities; or to operationalise gender as a cross-cutting issue.”

By 2005, it was found that the official Norad/Ministry of Foreign Affairs Development Cooperation Manual made no reference at all to the earlier Gender Handbook. It is not surprising that country gender evaluations conducted by Norad in Zambia (2005) and Mozambique (2009) showed that embassy staff “lacked practical knowledge of good practice and relevant tools” to mainstream gender effectively in country programs.⁴⁸

In the Swiss Development Cooperation (SDC), a gender toolkit was prepared and circulated. However, there “was no evidence in the field that these types of gender analysis tools were being used either intermittently or systematically, although there were reportedly no clear instructions from HQ on the use and promotion of this toolkit”.⁴⁹

Concerning the failures of various handbooks, sets of guidance and toolkits the evaluations reveal two broad causes. Firstly, the use of such knowledge products is not backed consistently by training or incentive systems. There are no sanctions for ignorance of or rewards for use of tools to support mainstreaming. Hence, their uptake is largely dependent on individual interest and not on the needs of the intervention or partner government⁵⁰. Secondly, some evaluations found that the operational relevance of tools and guidelines was reported to be low or in need of refinement⁵¹; and that field staff did not find them useful or user friendly, particularly in sectors (e.g., infrastructure) where there is a traditional reticence to include a gender perspective. Furthermore, tools were often “handed down” from headquarters “experts” to field level teams, creating “one-directional knowledge transfers” with little opportunity to adapt tools to local contexts⁵².

Lastly, there is an element of fatigue concerning the perceived ever-expanding number of priorities. An SDC evaluation summarized the commonly held view that “When you have 50 priorities, you have none.”⁵³ Donor staff, according to this body of evaluations, believe that

⁴⁷ Norad (2005a: 7; 31–32; 41; 54).

⁴⁸ Ibid: 41; Norad (2005b: 29); Norad (2009b: 12). Similar findings were reported by SIDA (2002b: 75); SIDA (2002c: 27); and SIDA (2010: 12).

⁴⁹ SDC (2009: 136).

⁵⁰ See experiences of EC (2003: 21–23); DFID (2006a: 37–38); Netherlands DGIS (1995: 135–139); Norad (2005a: 7; 31–32).

⁵¹ DFID (2006a: 37–38); SIDA (2002a: 74–75); SIDA (2010: 12; 41–42); UNFPA (2008: 8; 36).

⁵² See SIDA (2010; 41–42) and also UNDP (2006: 15; 42).

⁵³ SIDA (2010: 36).

they are overloaded with work associated with an ever-increasing collection of mainstreaming priorities, most of which come with their own toolkits and guidelines. In the absence of any clear priority setting by leadership, or of incentives to adopt mainstreaming procedures, such “priorities” slowly lose impetus and eventually disappear, and only resurface periodically in rhetorical usage.

Checklists

Checklists are another widely used tool for ensuring attention to gender issues. Their effectiveness has not been evaluated as often as other tools. From the early days of WID to current GAD approaches, checklists have moved in and out of favor, primarily as a project cycle screening tool to determine whether an intervention has appropriately incorporated gender issues into its components, activities, and indicators.

Recently, there has been a revival of interest in using gender checklists to screen interventions, strengthen the integration of gender, and encourage a focus on outcome-based reporting. This has been the case, for example, in ADB⁵⁴ and SDC,⁵⁵ which use checklists based on the OECD DAC “gender marker” system⁵⁶.

Experience has shown, however, that checklists often provide limited impetus for mainstreaming. For example, evaluations of EC and Netherlands experience⁵⁷ found that the practical use of checklists was limited to that of a screening, monitoring, or reporting tool. In the case of the Netherlands, checklists were developed in the early 1980s, but their inconsistent use caused them to be discarded in 1992. They were succeeded by the “development screening test,” which aimed to ensure that national policies, including WID, were being applied. This test was also found to be ineffective, as “most staff regarded the test and the criteria merely as administrative procedures that needed to be followed to get a proposed project through,” or as “an administrative ritual.” After the screening test was carried out, any emphasis on women during implementation tended to evaporate.⁵⁸

Underlying the negative experiences of the EC and the Netherlands is the fact that the tools have been required mainly at the project design phase, with limited application during implementation or monitoring. This erodes the perception of their usefulness among operational staff, who are “insufficiently stimulated” or attracted by incentives to use the tools in their work. SDC experience⁵⁹ with its gender checklist indicates that challenges arise if such systems are not backed by clear lines of responsibility and support from management:

“As part of this action plan, the Gender Desk, in cooperation with external experts, drafted a checklist to assess gender equality mainstreaming in project [proposals] and published two gender-responsive budget reports. The checklist is considered voluntary, and is being tested, and there has been no follow

⁵⁴ ADB (2010: vi; 30).

⁵⁵ SDC (2009: 4; 24; 31).

⁵⁶ See http://www.oecd.org/document/6/0,3746,en_2649_34541_37461446_1_1_1_1,00.html

⁵⁷ EC (2003: 7); Netherlands DGIS (1995: 133–136).

⁵⁸ Netherlands DGIS (1995: 26; 139–140).

⁵⁹ SDC (2009: 24; 31).

through by senior management....Using the checklist and the gender marker will require a management decision to make it compulsory, as well as training and monitoring so that staff doing the scoring can apply it consistently.”

The rather limited evaluative assessments of checklists indicated that they have many of the same limitations as other tools; and that they also require a supporting framework of training, incentives, accountability structures, and leadership to enable staff to use them appropriately.

Training and Awareness Raising

Training is one of the standard approaches used to raise the profile and practice of gender mainstreaming, particularly among non-gender specialists. All of the evaluations assessed training; and although good practices can be found, they tend to be fragmented in different pockets within organizations, so that successes cannot be readily scaled up to develop a coherent organization-wide approach to gender training.

An important dimension of such training is that its knowledge and expertise should reach down to the local field level, which has often proved a major problem. This is exemplified by a discussion in a 2001 ADB evaluation.⁶⁰

“Projects with good, gender-inclusive design can still fail to meet their objectives if those objectives are not fully accepted by the government agencies concerned. This is particularly so if insufficient resources are allocated to staff recruitment and training, and to raise beneficiary awareness. This study found that, in most cases, Implementing Agencies at the field level recognized the need for improved training in social and gender aspects and social mobilization for staff and beneficiaries, but lacked the skills and resources needed for these activities. Most of the projects did not provide adequate, item-specific budgets for "software" such as training in skills and social awareness, or for changing attitudes and practices to support development innovations. Budgetary constraints impeded the successful implementation of the "software" required for the sustainability of "hardware" such as clinics or irrigation infrastructure or water supply systems.”

The ADB’s follow-up evaluation of gender conducted in 2009–10 found that training was still not functioning effectively to aid mainstreaming. One problem identified was that at higher levels of the organization, the key operational staff responsible for gender monitoring rarely attend the appropriate training, often citing their burdensome travel schedules. The evaluation found that “the challenge to intensify GAD training to ADB staff remains, particularly on the need to expand the frequency and the number of trainees, targeting headquarters staff including mission leaders.”⁶¹

⁶⁰ ADB (2001: 21).

⁶¹ ADB (2009: 14–15). Similar training experiences were reported by the EC (2003: 20) and the World Bank (2005 xiii–xiv; 39–40); World Bank (2010: xiv; 35–36). In the World Bank, poor attendance of senior management contrasted with good attendance by often transient consultants and junior staff, who have little influence over gender mainstreaming.

Staff training is adversely affected by the common tendency to employ fewer gender specialists than needed, or to gradually scale down gender specialist staffing positions as the immediate incentive of new policies or procedures fades.⁶² An ADB finding from a 2009 evaluation is illustrative of the direct relationship between resources and training intensity:

“Four gender specialist positions (two that were existing and two additional positions) were envisaged in the Policy but, between 2005 and 2008, ADB operated with two gender specialists. Consequently, the expected training of operational staff and the dissemination of knowledge on GAD were much less intensive than expected.”

Well-articulated mainstreaming policies, such as that of DFID,⁶³ lose their effectiveness if not supported by training. An evaluation notes that there has been “little or no training by DFID in gender mainstreaming,” since such mandatory training was curtailed in the late 1990s, and instead was:

“.... mainstreamed in principle into existing training programmes with the objective of rendering the training more effective by linking gender with technical competencies. However, the gender mainstreaming of the training effort has never been reinforced, and DFID’s gender training has effectively come to a halt.”

In DFID, this proved even truer at the country level than at headquarters—evaluation case studies of three substantial DFID country offices (Bosnia-Kosovo, India, Nigeria) found that no staff at any of these offices could recall having received gender training.⁶⁴

Another commonly noted problem with training was that it is not sufficiently targeted to its recipients. An EC evaluation noted that the “main weakness of the training was that it was not based on a sufficiently good training needs assessment. Participants were too heterogeneous and the training material was ‘pre-cooked,’” so it was not adapted to the EC’s needs. In the view of the Gender Desk, “it would have been better if the training had been very focused and worked with smaller, specially selected groups who had the same training needs.” An uncommon example of good practice in gender training was presented by the European Commission for Madagascar. It shows the degree of effort required to achieve good results.⁶⁵

“An example of a successful gender training course in the context of European Commission development co-operation is a residential five-day training course in “gender-integrated PCM” (Project Cycle Management) organised for programme and project managers of EC co-operation in Madagascar in July 2000. This well-targeted training course was developed in response to an identified need and demand by partners and by the ... project, and was based on a solid training needs assessment.... The investment in preparing the training, in adapting the training materials to the specific context of EC-MAD

⁶² ADB (2009: iii).

⁶³ DFID (2006a: 31–32).

⁶⁴ Ibid: 32.

⁶⁵ EC (2003: 21).

(Madagascar) co-operation and in evaluating and following up the training was substantial, but this appears to have paid off in view of the [evaluation results]. Follow-up training was provided in 2002....”

However, all training programs are susceptible to the effects of attrition as staff are promoted, leave, or focus their work on other priorities. As the same EC evaluation notes⁶⁶:

“While one-off courses can have positive effects, the impact of the training is limited and can be difficult to sustain. Although two training sessions had been organised for Delegation, Programme Managers and key counterparts in Jordan in 1999 and 2001, staff and partners felt that further training was needed, particularly with the high turn-over of staff and the large numbers of new staff.”

Another challenge highlighted by many evaluations is the perception of training overload by some officers in international organizations.⁶⁷ At the country level, a complex set of barriers to training effectiveness may be perceived. For example, an ILO⁶⁸ evaluation noted the following difficulties:

“... organizational and recruitment difficulties amongst constituents; difficulties to identify trainers and local language training materials; the need to train at operational levels rather than at the macro level; project staff turnover; the need for better targeting of the groups for gender sensitization; the need for ILO support to be more decentralized; the need for project documents and structure to provide better guidance for project implementation and evaluation.”

The question of where gender equality training “fits” has also raised major difficulties. As noted in an evaluation by Norad⁶⁹:

“... it seems that stand-alone women and gender equality (W&GE) courses have little appeal, and should be avoided. Since also mainstreaming W&GE into all lectures has met much resistance, the option seems to be specific W&GE sessions to be integrated into core and obligatory courses and training sessions.”

Monitoring and Evaluation

Deficiencies in results reporting and M&E were widely noted by the evaluations, with no systematic organization-wide good practices yet observable.⁷⁰ In organizations such as ADB,

⁶⁶ Ibid: 21.

⁶⁷ See EC (2003: 44).

⁶⁸ ILO (2005: 11).

⁶⁹ Norad (2005a: 31–32).

⁷⁰ Repetitive failures seem to be common within the development banks covered with reviews and evaluations covering over 20 years of the ADB and World Bank’s operations.

Norad, SIDA, and the World Bank,⁷¹ which have come under the scrutiny of several rounds of organization-wide gender evaluations, M&E remains a stubbornly challenging area. This has serious implications for gender equality mainstreaming; for without systematic results measurement, it is impossible to learn systematically from successes and failures. Moreover, good results could be used to advocate for and support mainstreaming.

As noted in a Norad evaluation⁷²: “With few exceptions, the projects lacked specific monitoring requirements to assess gender impacts.” This has been a common occurrence, which has been well analyzed, for example, by the Asian Development Bank⁷³:

“Both the Policy itself and the associated section of the Operations Manual presume sound monitoring of GAD activities. So far, despite efforts of GAD specialists on their own to track GAD activities in ongoing TAs and projects, little has been done in terms of standard official documentation to ensure that monitoring takes place....[P]roject performance reports that track project implementation have no specific category or section for GAD indicators. As a result, progress, or the lack of it, in GAD activities is simply not recordedGAD progress is often not covered in back-to-office reports of regular or midterm reviews.”

Only where GAD advisors had made specific inputs into project M&E systems did this situation improve. The failure to monitor and report gender outputs and outcomes relates to the lack of attention given to GAPs and gender analysis, which could provide the basis for developing intervention baselines and indicator frameworks. In general, it is mainly in the human development sector (education, health, social protection), and to a lesser extent in microfinance, that project design analysis and M&E systems have come together to provide a coherent basis for results reporting—and thus a body of experience and practice with the potential to be adapted in other sectors.⁷⁴ Monitoring of gender results has often not followed the good intentions of mainstreaming policies and remains a major area for improvement.

The weaknesses in monitoring are mirrored in evaluation, where inclusion and assessment of gender is generally lacking. This is the case for the European Commission,⁷⁵ whose:

“Evaluations provide very little information on gender. An assessment was undertaken of final reports of sectoral/programme evaluations, which should be an important source of information on the effects of EC development interventions on target groups and beneficiaries. However, these produced very limited information concerning this evaluative question....[M]ost evaluations had not addressed gender, or even women”

⁷¹ See ADB (2001: iii; 27–28); ADB (2009: iv–v; 25; 48); SIDA (2002a: 7; 13; 35; 66); SIDA (2010: viii; 7; 11–13; 16–18); World Bank (1995: 3; 39; 111); World Bank (2005: xiii; 24; 27; 37; 54); World Bank (2010: viii–ix; 29–31; 39–40).

⁷² Norad (2005a): 44

⁷³ ADB (2009: 25).

⁷⁴ See, in particular, World Bank (2010).

⁷⁵ EC (2003: 41).

This was despite the EC evaluation guidelines recommending that cross-cutting issues, including gender, be a standard part of every assessment.⁷⁶ Several evaluations have also noted that by the time gender interests reach the level of field implementation activities, monitoring is of the “bean counting” variety, rather than providing any useful information about processes and outcomes⁷⁷ which can be evaluated. A Norad review of 63 evaluations showed that 38 did not include any reference to gender. Even in the 24 evaluations that were specifically focused on gender-related issues, only 12 contained information about women’s needs and interests. Interestingly, the review found that even when evaluation teams included a female, it made little difference to the adoption of a gender-sensitive perspective. The lack of such a perspective appeared not to be generally caused by deliberate exclusion, but rather to derive from the lack of integration of gender into intervention design and monitoring, which enabled it to be overlooked in evaluation. Perceived topic overload and competing demands within terms of reference also played a role⁷⁸:

“Most evaluations are overloaded with tasks to be investigated and assessed and ToRs are usually full of competing demands. Gender issues are not the only policy that evaluation teams have to respond to.”

A recent World Bank evaluation also found low consideration of gender in implementation completion reports (ICRs), one of the Bank’s main self-evaluation tools. Country Assistance Strategy Completion Reports (CASCRs) also, more often than not, failed to capture gender-related outputs or outcomes.⁷⁹ But the experience of CIDA’s evaluation functions does provide an emerging good practice. Here it was found that evaluation terms of reference are more likely to require some form of gender analysis, even for projects not specifically designated as Gender Equality activities, than are monitoring systems⁸⁰:

“Gender equity appears to be more consistently assessed (generally as a cross-cutting theme) in evaluations of non-GE projects, than in their monitoring. This may be due to the apparently more systematic inclusion of GE among standard evaluation Terms of Reference.”

⁷⁶ EC (2003: 35).

⁷⁷ Netherlands DGIS (1995: 145).

⁷⁸ Norad (2005c: 7–8; 28).

⁷⁹ World Bank (2010: 39–40).

⁸⁰ CIDA (2008: xvii).

4.2 Leadership: The Critical Factor

“You learn far more from negative leadership than from positive leadership, because you learn how not to do it and, therefore, you learn how to do it.”

Norman Schwarzkopf⁸¹

Summary

The evaluative story of gender mainstreaming that emerges from the review is that consistent leadership from management is critical to integrate gender at an organizational, country and intervention level. **When management within donor organizations has not consistently supported the implementation of gender mainstreaming policy, that policy has not been translated into concrete actions at headquarters or at the field level, and has experienced what has become widely described as *policy evaporation*.**

Evaluations indicate that gender champions need to be situated within senior and middle management, with sufficient power to (a) support and influence the implementation of gender mainstreaming policy by technical staff; and (b) ensure that partner governments receive the necessary assistance. The often-tried technical fix of increasing the number of gender specialists or creating dedicated gender units has not resulted in effective leadership (see following section on resources). This is because the human resources and skills created are not backed up with the power to influence operations. The result has often been the marginalization of gender staff, and in some cases, the eventual disbanding of such units.

The review of evaluations indicates that leaders need to go beyond advocacy and technical fixes and develop an organizational structure in which staff motivation, incentives, performance, and accountability benchmarks are closely aligned with learning opportunities, resources, and knowledge management, in order to effectively support policy implementation. In practice, such alignment has rarely occurred and, in general, the leadership record on gender mainstreaming in development organizations demonstrates how not to do it. This section highlights some key leadership issues that emerged from the review.

Ups and Downs of Leadership: Evaporation of Mainstreaming Policy

The importance of management leadership for the effective gender mainstreaming in donor organizations was cited to varying degrees in all 26 evaluations included in this review. The majority of evaluations focused on leadership within donor organizations, but it was also an important factor within partner government ministries and agencies, as reported by the DFID, Norad, SIDA, and SDC evaluations.⁸²

Leadership has not been explicitly defined in the evaluations, it is associated with a mix of soft characteristics such as “vision and commitment,” “decisionmaking and prioritization,”

⁸¹ http://www.brainyquote.com/quotes/authors/n/norman_schwarzkopf.html.

⁸² DFID (2006a: xii; 25 – 28); Norad (2005a: 25; 37; 51) Norad (2009a: 29; 37); SIDA (2002a: 152 - 160); SDC (2009: 18; 29).

“motivation,” “recognition,” “communication and giving voice”; and of hard measurable indicators such as financial and human resource allocations, staff incentives, policy development and dialogue, accountability and performance systems, and results targets.

The evaluations judged leadership to be weak, or at best variable over time, with regard to gender mainstreaming, and this had a detrimental impact on its effectiveness. The evaluations noted strong leadership commitment to gender issues at certain times, such as in the years building up to and following the Beijing Fourth World Conference on Women in 1995. During this period of commitment, the mainstreaming agenda was adopted, as evidenced by increased policy emphasis and organizational resource allocations. However, this leadership commitment was not sustained, so that by the end of the 1990s the interest of agencies had waned at the senior management level, allowing considerable policy evaporation in most organizations.⁸³ This evaporation⁸⁴ eroded many of the positive organizational changes that had been achieved in the 1990s and constrained the actions of technical staff in advancing gender equality in partner countries. The experience of WFP is illustrative of the experiences across the multilateral and bilateral agencies⁸⁵:

“WFP started with extraordinary corporate leadership, and staff committed to women’s empowerment. Subsequently, however, leadership has diminished. Staff and partners describe a prolonged quiet regarding gender mainstreaming. They refer to a downward slide over the last couple of years. Many interpret the recent disbanding of the Gender Unit as a dramatic signal of decreased importance—and they have questions about the adequacy of current staffing to oversee a new policy and coordinate experience.”

Decisions to disband gender departments, reduce or not replace gender specialists, or operate with low and often junior or part-time staffing have been reported in evaluations by ADB, Norad, EC, DFID, UNDP, UNICEF, CIDA, and SIDA⁸⁶ in the last 10 years. This shows that, in comparison to other issues such as governance, poverty reduction, new aid modalities, and the private sector, gender is not a priority of leadership.

The leadership failure to move beyond policy to implementation is explored further in the sections below.

⁸³ See particularly the experiences of Norad (2005a) and DFID (2006b).

⁸⁴ Evaporation is also referred to as ‘vaporisation’ in the corporate world – “In nearly 75 percent of the companies, the leadership team has not made gender parity a stated and visible priority and nearly 80 percent of the firms have not committed resources to the initiatives. One Europe-based female senior manager in a global energy firm says: “Unless senior leaders of the organization are sincerely and genuinely committed to achieving gender parity and putting some metrics and muscle behind it-it won’t ever happen in my lifetime.” See Bain (2010) *The Great Disappearing Act: Gender Parity Up the Corporate Ladder*. Bain Consulting. Boston.

⁸⁵ WFP (2008:49).

⁸⁶ Norad (2005a: 28–29); DFID (2006a: 31; 49); ADB (2009: iii; vii); EC (2003: ii–iv; 14; 20–22); UNDP (2006: vi–ix; 12–13–15; 19); SIDA (2002a: 20–21; 24); SIDA (2010: viii; 12–13); UNICEF (2008: vii–viii; 36–38); CIDA (2008: 23).

Competing Leadership Priorities: Sidelining of Gender Mainstreaming

One of the causes of the erosion of leadership on gender mainstreaming cited by 16 of the evaluations is overload of or competing development [and leadership] priorities, which have tended to supplant gender equality. As noted above, gender mainstreaming gained much attention in the mid to late 1990s, but was soon sidelined by the rise of new priorities, which senior management perceived to be more important. These included the MDGs, poverty reduction, new aid modalities such as GBS, and, more recently, such issues as governance, anti-corruption, and climate change. Norad's⁸⁷ experience is illustrative. The agency highlighted women and gender equality as one of its priorities in 1997, after Beijing; but by the mid-2000s, this had almost completely disappeared and had been replaced by the MDGs, anti-corruption, HIV-AIDs, environment, and rights. Some of these priorities, such as environment, were also promoted as cross-cutting issues with their own mainstreaming agendas.⁸⁸ A Norad evaluation of gender in its Zambia program indicated that while gender remains a consideration in core areas such as education, embassy staff "have other priorities" and pay only "lip service" to gender, which faces a "real danger of donor fatigue."⁸⁹

The "sidelining" effect of new and competing priorities has been compounded by the poor implementation of gender policies. This has been characterized by missed opportunities to link gender to the new priorities, particularly in the case of GBS. Other instances of sidelining include lack of communication and cooperation between "established" sectors within organizations and gender technical staff (the "silo-effect"), leading to the exclusion of gender from projects and programs; and capacity and mainstreaming overload, compounded by insufficient capacity owing to cuts in gender resources. DFID's and SDC's experiences are representative of those of other donors:

DFID: "A common judgment is that after Beijing, DFID engagement in gender issues faded. They did not follow up with resources to governments and civil society to implement the Platform for Action. An opinion is that this process was deepened since top management's focus was on Poverty Reduction, with no connection seen between Poverty Reduction and women's rights."⁹⁰

SDC: "Gender is widely perceived as just one of a continual stream of thematic requirements, guidelines and priorities. New issues—youth, access to information, corruption, climate change, generate policy discussions and guidelines which are meant to be implemented without anything being removed from the plate."⁹¹

⁸⁷ Norad (2005a: 19–22; 24).

⁸⁸ See also DFID (2006b: 118–119); EC (2003: ii; iv; 48–50); UNICEF (2008: viii; 21); UNDP (2006: vi–vii; 40).

⁸⁹ Norad (2005b: 9–10).

⁹⁰ DFID (2006b: 119).

⁹¹ SDC (2009: 32).

SDC: “There is also limited cooperation between government departments on gender equality issues. Gender focal points sitting in national, regional and local governments lack the capacity and institutional leverage to strengthen their analysis and integration of gender issues at the policy and program levels.”⁹²

SDC: “Innovations in GBS are difficult to implement. In the context of working in aggregation, it is difficult to push certain issues that may not be viewed as the core business of development or sectoral priorities. Donor fatigue aggravates this situation. Changes are hard to introduce into the annual work cycle of planning, budgeting and monitoring. Finally, and perhaps most importantly, there is little demand to address gender equality issues—the government does not ask for it and gender equality has in reality been pushed to the back burner of the donor agenda, particularly after the introduction of donor harmonization.”⁹³

Country-led and country-specific programming has allowed senior management to engage with greater sensitivity and inclusion, but has also resulted in focusing on what countries perceive as their most important short-term issues. Gender equality tends to be an area of low or niche demand from partner countries, and this is reflected in donor programming. The only area where gender has maintained a strong operational emphasis is in human development (see 4.5 and Chapter 5), where it is less complicated to integrate operationally.

Career Incentives and Leadership

In many of the evaluations reviewed, one of the root causes of leadership failure is the lack of performance benchmarks or delivery standards to hold leaders accountable. This is exacerbated by the lack of monetary and non-monetary incentives to encourage a sustainable focus on gender mainstreaming processes and improving gender equality results.

Managers, like all staff in donor organizations, respond to their perceptions of the reward and accountability systems, and of how these relate to implementation of current development priorities. In cases where managers do not see clear organizational links among gender policy, incentive systems, sanctions, and career rewards, the leadership focus on gender has proved unsustainable.⁹⁴ The experience of UNICEF demonstrates this⁹⁵:

“The majority of senior managers noted that there are no real institutional rewards for promoting gender equality within a programming context. In general, they observed that UNICEF tends to reward its senior managers for being efficient in addressing administrative as opposed to substantive issues.”

⁹² Ibid: 135.

⁹³ Ibid: 64.

⁹⁴ See experiences of EC (2003: 48–49); DFID (2006a: 26–27); Norad (2005a: 35–36); UNDP (2006: ix; 34–35; 39–40).

⁹⁵ UNICEF (2008: 34).

The World Bank's most recent gender evaluation, completed in 2010, finds almost identical accountability, incentive, and leadership failures to those identified in its 2005 and 1995 evaluations of gender and women's empowerment. The recurring findings demonstrate that senior management progress on developing accountability and incentive systems for gender equality has been slow, despite clear and consistent evaluation findings:

*2010: "The rather elaborate accountability system outlined in the Gender Strategy [2001] was not institutionalized. No standard systems or processes were put in place to assess, reward, or sanction staff and managers' work engagement or outputs."*⁹⁶

*2005: "A staff [and management] accountability framework is normally provided by a series of reviews at different stages of processing to ensure that policy is implemented during the preparation of assistance, as in safeguard policies. This evaluation found no similar processes or procedures explicitly requiring a review of the handling of gender issues at any given stage of product processing, including supervision....As a result, there has been very little institutional accountability for failure to integrate gender considerations. Between fiscal 1996 and fiscal 1997, each Region was asked to prepare and implement gender action plans, but this implementation was not systematically monitored, possibly because of the subsequent reorganizations and changes in management."*⁹⁷

*1995: "Current thinking is that more attention needs to be paid to the organizational context, and that incentives to use these new skills should be built into an organization's incentive structure. Another flaw was the lack of provision for follow-up by either the Training Division, the WID unit, or senior management....First and foremost, a successful gender training program requires a firm commitment from management. This includes senior management participation in the design of the World Bank's gender policy and training. It includes the participation of senior management in the training courses. It also includes the provision of incentives through program or personnel reviews for using these skills."*⁹⁸

In view of the absence of incentive and accountability systems, the implementation of gender mainstreaming and equity policies becomes largely a voluntary exercise, dependent on the commitment and interest of individuals. Few careers advance or fall based on the success or failure of the implementation of gender mainstreaming or gender policy. Ambition, motivation, and personal interest to advance are focused on issues that are seen as more important to the organization. These are priorities that may be in line or at least not in conflict with the current organizational culture. Leaders and aspiring leaders do not see the value of commitment to a cause that is not valued or promoted within their organizations, particularly

⁹⁶ World Bank (2010: 34).

⁹⁷ World Bank (2005: 33–34).

⁹⁸ World Bank (1995: 109–110).

when there are no rewards or sanctions associated with that cause. This being so, “gender equality is often left to the hazards of personal interest and chance.”⁹⁹

Gender Equality in the Leadership of Donor Organizations

The question of gender equality within donor organizations was not assessed by every evaluation. However, from those that did, it is clear that gender equality at the management level is not in sight. Men overwhelmingly occupy positions of power and influence at the highest levels of leadership. For example, in UNDP, women occupied only 26 percent of Resident Representative positions¹⁰⁰ and 31 percent of P5 (senior technical level) positions as of 2006.¹⁰¹ Similarly, an earlier evaluation (1995) of women in development in Netherlands’ overseas assistance found that “the higher the rank, the smaller the percentage of female staff—only a few percent of the highest ranking staff in the Ministry are women.”¹⁰²

Such low figures are often attributed to the competing social roles of women, which mean that a sustained career path is not always possible. However, this also indicates that many organizations do not have the right human resource policies to assist professionals in achieving work-life balance. An evaluation by UNICEF seems to support this conclusion¹⁰³:

“They [staff] did not see how UNICEF could practice gender equality externally in its programs without also practicing it internally. They also noted that UNICEF was not a particularly child or family-friendly organization for staff, citing long work hours as a challenge for those with children or other family responsibilities and the fact that there was little attention to the work-life balance throughout the organization.”

An SDC evaluation reported that women’s advancement and equal opportunities within the organization improved significantly during the period it covered. Many more women were recruited, and there were more women in senior management positions. Furthermore, the SDC put in place family-friendly policies such as telecommuting and part-time work options. These are good concepts, but they have yet to be fully translated into good practice; and the evaluation reported that their application has been skewed by deeply embedded cultural norms regarding the position of women and traditional attitudes to work.¹⁰⁴

⁹⁹ SIDA (2002a: 103).

¹⁰⁰ Although not reported in any of the evaluations, this review looked at former and present presidents of the Multilateral Development Banks (MDBs). We found that since their creation, only men have been selected as presidents of the World Bank, ADB, AfDB, IADB, IsDB, EIB or the EBRD. Whilst this may be an anecdotal measure of gender equality as there are many factors at play in selecting presidents of MDBs it seems gender equality has not played a significant role, despite the increasing availability of well-qualified women leaders within the development, corporate and political fields.

¹⁰¹ UNDP (2006: 20).

¹⁰² Netherlands DGIS (1995: 24).

¹⁰³ UNICEF (2008: 22).

¹⁰⁴ SDC (2009: 30).

“The very success of the women’s advancement and equal opportunity efforts has created a new series of challenges that only attention to more deeply embedded ways of working can address. Staff reported that although it is possible to work part-time, job responsibilities are seldom reduced to match: in other words, they feel they are expected to carry the load of a full-time worker. This means that there is little time for learning or reflection. The administrative work required to facilitate decisions and program implementation dominates the agenda. In addition, it is mainly women who take advantage of part-time work: their male counterparts feel less able to do so, or are only beginning to consider that possibility....Tele-work is grudgingly allowed or refused by some managers, and there is no perceived consistency in permission or refusal. Some senior managers see little possibility of any way of working other than the model they themselves have lived: having a primary commitment in time and dedication to work at the expense of work/life balance. Many of these men come from a tradition of wives whose job it is to raise the children and support their husband’s career. Few of the senior women have young children.”

Although SDC has increased its ranks of women professionals, this has not resulted in systematic improvements in gender mainstreaming in the interventions in partner countries.

4.3 Resources for Delivery

Summary

This section addresses financial and human resources provided to mainstream gender equality. **The majority of the evaluations indicate that resources have been insufficient to enable effective mainstreaming of gender equality within donor organizations.** While less information is available from the country level, what there is suggests that resources within partner governments for gender equality mainstreaming are constraining their ability to achieve sustainable results.

Human resources in organizations, in terms of numbers of gender specialists, have remained at a low level or been cut. Personnel responsible for gender mainstreaming in many organizations are often relatively junior or part-time staff. This has made mainstreaming difficult due to lack of influence such staff have on senior management. Furthermore, gender expertise and activities have not been integrated into the roles and responsibilities of non-gender specialist staff, so gender has failed to become everyone’s business.

There is no established good practice baseline for financial resource commitments to enable effective mainstreaming. Most evaluations highlight the financial resource challenge, but there are scant data available on resourcing gaps, because most agencies do not have budgeting systems that can readily identify commitments to gender mainstreaming at the administrative or intervention level.

Human Resources for Mainstreaming

Human resources are central to mainstreaming gender equality at the organizational and field level. Skilled personnel are needed to deliver appropriate knowledge and to conduct analysis and monitoring functions in the design and implementation of interventions; as well as to provide policy and technical advice to partner governments. Evaluations indicate that a comprehensive approach to mainstreaming would require gender specialists at both headquarters and the country level (for those agencies with such a structure). These specialists must have the budget and mandate to influence the design and implementation of interventions, and to provide technical support to partner governments. With the exception of the IOM,¹⁰⁵ the evaluations tended to report that human resources were not sufficient to support mainstreaming of gender equality.¹⁰⁶ Staffing levels in many organizations had undergone cuts or experienced reorganizations¹⁰⁷ that reduced the ability to deliver intended results. The timing and pattern of cuts is broadly related to the management, leadership, and prioritization issues already highlighted. The prevalent human resource challenges are a symptom of the inconsistent leadership focus on gender.

Organizations that have not cut back on gender-focused staff tend to be those that started off with relatively low human resources in this area. A recent World Bank evaluation¹⁰⁸ stated:

“A rough estimate by the Gender Group in PREM [the Poverty Reduction and Economic Management Network] suggests that staff at the Bank working on gender full or part time number about 64 full-time staff (about 0.59 percent of total staff as of fiscal 2006). This is broadly confirmed by an examination of recruitment figures in the Bank between fiscal 2003 and 2009—staff recruited and mapped to the Gender Network constitute 0.50 percent of all staff recruited.

“At a Regional level, those with gender skills included regional gender coordinators (RGCs); at the country level, country focal points were the locus of those skills. Interviews with RGCs suggest that the time spent on gender work has declined over the evaluation period, with RGCs and country focal points taking on multiple responsibilities unconnected with gender, or the gender responsibility being added to the work of staff fully engaged with other responsibilities.

It is difficult to conclude whether the Bank maintained adequate gender specialists during the evaluation period. During the same period (fiscal 2003–09), the Bank hired almost four times the staff for the environment sector, and as of May 2009, there are more than 16 times the staff formally mapped to environment (267) than to gender (16).”

¹⁰⁵ IOM (2006: 8–25). However, the mandate of IOM is tightly focused and the extent of mainstreaming activities is limited.

¹⁰⁶ ADB (2009: viii; 13) BMZ (2006: 5); DFID (2006a: 31–32); EC (2003: iv–xvii; 25–27); Norad (2005a: 6; 30); Norad (2009a: 4; 44); SIDA (2002a: viii; xv; 20–21; 25); SIDA (2010: viii; 11–12); UNDP (2006: 12–13); UNICEF (2008: viii; 26; 28–29); World Bank (2010: 34–35).

¹⁰⁷ See experiences of Norad (2005a); UNDP (2006); and UNICEF (2008).

¹⁰⁸ World Bank (2010: 35).

Although mainstreaming should result in gender becoming everyone's business, therefore effectively making the role of dedicated gender specialists largely redundant, this organizational status has not been realized in practice. DFID, for example, did not build a cadre of gender specialists, but made this area part of the remit of social development advisors (SDAs). A DFID evaluation found that, although gender specialist staff resources were limited, DFID was active at the international policy and strategic level, and in research on gender equality. However, this did not filter down to the country implementation level, where the availability of resources and training for staff was minimal. The SDAs, who had overall responsibility for gender mainstreaming, tended to be more focused on other priorities, notably poverty reduction and the MDGs. Although in principle, all DFID staff were responsible for gender mainstreaming, "diffused responsibility all too easily equates to no responsibility, [since] no DFID staff members [including SDAs] are held accountable for the attainment of gender policies in practice." To cope with the lack of in-house human resources, DFID outsourced many gender responsibilities, resulting in a loss of institutional memory in this area. Furthermore, the social development practice gradually weakened in comparison with the economics, conflict, and governance departments through the attrition of key staff. The evaluation concluded that "the current level of staffing is not appropriate for broad based gender mainstreaming."¹⁰⁹ It is clear that the diffused responsibility structure adopted by DFID did not work in the absence of incentive and accountability measures.

Many organizations adopted a structure of "gender focal points," in part to substitute for dedicated gender specialists. The intended use of focal points has been to disseminate gender-based knowledge resources across sectors at the country or field level, as well as to provide informal backstopping and advice to supplement formal training. The SDC, EC, UNDP, and UNICEF evaluations¹¹⁰ found that many gender focal points did not possess enough knowledge on gender issues to assist other staff or to provide advice to partner governments. In the case of UNDP, for example, gender focal points were often the "most junior staff, with no job description or clear sense of role," and in many cases, their gender responsibilities were one task among many, making them very much part-time focal points. In Norad, the network of gender focal points in regional departments was created in the late 1990s but had "disintegrated" by 2004, due to "lack of status, mandate and management support."¹¹¹

Although the gender focal point system of deploying human resources for mainstreaming has the potential to be effective, the focal points would need to have sufficient time, knowledge, and support from management to influence their colleagues. The example of SIDA indicates that, although the organization has persisted with the focal point system, the results have not improved. An early SIDA evaluation (2002) shows that while focal points possessed detailed gender knowledge, other staff in the embassies viewed gender mainstreaming as the responsibility of the focal point and not themselves. Therefore, mainstreaming stopped at the focal point. The follow-up gender evaluation in 2010 again reported that focal points were

¹⁰⁹ DFID (2006a: xviii; 31–32).

¹¹⁰ EC (2003: 50–51) and SDC (2009: 32; 153–154). SIDA (2002a: 69–70; 149); SIDA (2010: 12); UNICEF (2008: ix); UNDP (2006: vi; 12–13).

¹¹¹ Norad (2005a: 27–30).

finding it difficult to influence colleagues and that they were overburdened with other responsibilities.¹¹²

The evaluations showed a similar situation at the country and field level. There were few gender specialists, and most organizations had part-time gender focal points in embassies or country offices to assist staff and partner countries in mainstreaming gender equality, often with little or no backup.¹¹³ In general, the few full-time gender specialists have not been decentralized to field positions and are remote from the design and implementation of the interventions they need to influence and support. As a complementary approach, the ADB has had some success with the recruitment of national gender specialists through its regional technical assistance funds¹¹⁴ in six¹¹⁵ of its member countries. These personnel have enabled the ADB to serve the needs of partner countries and incoming missions more effectively¹¹⁶:

“The consensus is that these experts provided valuable support to the Resident Missions themselves, operational staff from headquarters, and the individual governments. However, the sustainability of this measure is in question since funding comes from a series of Regional Technical Assistance funds, and is, thus, time-bound and could end once the technical assistance is completed.”

While national gender specialists somewhat strengthened the ADB approach, until 2008 the organization functioned with only two full-time gender specialists in its headquarters,¹¹⁷ which limited the amount of time and training that could be devoted to integrating gender concerns into its interventions.

Findings concerning national governments were inconsistently reported across the evaluations, due to differences in their focus and design. However, the available information shows that human resource challenges similar to those found in donor organizations are common in ministries and government departments. These include low numbers of staff with gender equality skills, attrition of staff, and male bias in management and performance perspectives, all of which constrain opportunities for gender equality. SIDA’s experiences in Bangladesh, South Africa, and Kenya are illustrative¹¹⁸:

Bangladesh: “The overt policy environment for advocacy relating to gender equality in Bangladesh must be seen as very positive. For most external development partners in Bangladesh, the difficulties in promoting gender equality have been much more on the operational side than in the basic policy framework. They have noted that the very large scale and limited resources of many ministries, agencies and programmes has often meant that priorities

¹¹² SIDA (2010: 12); SIDA (2002a: 70; 111; 149; 153).

¹¹³ See for example, UNICEF (2008); Norad (2005a and 2009a); SIDA (2002a and 2010).

¹¹⁴ Regional Technical Assistance funding is not part of the ‘core’ ADB administrative budget.

¹¹⁵ Bangladesh, Indonesia, Nepal, Uzbekistan, Pakistan and Vietnam.

¹¹⁶ ADB (2009: 27).

¹¹⁷ It was originally envisaged that four gender specialists would work across the Bank, but 2 positions were not filled because of internal reorganizations. The situation remained the same until steps were taken in 2009 to recruit extra full-time staff. See ADB (2009: iii; 26–27).

¹¹⁸ SIDA (2002a: 12–13) and SIDA (2010: 15).

expressed at the national level are not followed through with specific actions within development interventions. Or, alternatively, those actions are frustrated by operational issues relating to staff turnover, availability of resources, training and the need to serve very large programme constituencies with very limited resources.”

South Africa: “There are no plans in place to ensure that [South African] legislation is implemented and monitoring systems are very weak. In addition, the gender structures in government remain relatively weak and under-resourced.”

Kenya: “Trainers also remarked that while the training on cross-cutting issues [gender] often was ‘a real eye-opener’ to some of the (exclusively male) District Engineers, it would be unrealistic to expect them to champion the issue since their primary concern is the quality of roads, which is what they will be evaluated on in their own reporting systems and performance contracts.”

Recruitment Processes

Recruitment processes also reflect the absence of serious attention to gender expertise and experience. There are relatively few gender specialists within most organizations, and gender does not feature as a cross-cutting issue in recruitment of non-gender specialists. For example, in UNICEF¹¹⁹:

“HQ is responsible for preparing generic job descriptions of the different positions held by UNICEF staff. With the exception of the GFPs (Gender Focal Points) at the HQ level, these job descriptions do not include any reference to staff responsibilities for incorporating gender as a cross-cutting issue in their specific area of work. This means that during recruitment, staff are not routinely asked about their competencies in relation to gender, and there is nothing in their job description to hold them accountable for their performance in relation to gender equality.”

A common “remedy” to the continuing absence of the required gender expertise throughout donor organizations is simply to hire consultants or junior staff¹²⁰ to address these issues as needed.¹²¹ Although such practices may be more cost effective and provide organizations with much-needed flexibility, the problem with this approach is that the knowledge and overview of the institution gained by the consultants almost always stays with them, rather than permeating the institution itself. Therefore, it is not a real solution to internal human resource deficiencies. Furthermore, junior staff and consultants often have very limited influence on organizations, as they are either not sufficiently embedded or considered outsiders.

¹¹⁹ UNICEF (2008: 34).

¹²⁰ UNDP (2006: vi; 13); SDC (2010: 59); UNICEF (2008: ix).

¹²¹ See, in particular, the experience of the EC (2003: iii; 22; 27; 33–34).

The low status of gender equality expertise in the recruitment patterns of international development institutions has tended to reinforce the perception of other staff that gender is not a high priority.

Financing for Gender Mainstreaming

Financing for gender mainstreaming is critical to ensuring adequate budgets for gender specialist staff positions and consultants; as well as for capacity building resources, such as tools and training. Funds also need to be available at the intervention level for gender analysis, supervision, and M&E. The evaluations reveal two key issues: (a) tracking of gender financing has been weak, so there is no established good practice on the costs of effective mainstreaming; and (b) despite the lack of financial data, most evaluations conclude, on the basis of proxy indicators, that financial resources are not sufficient to support the organizational changes required to mainstream gender equality.

The availability of evaluative data on financing at the organizational and intervention level was relatively weak, as it was not possible for all evaluations to get a clear picture of administrative or intervention-level budget commitment of their organization. Some data were not reported,¹²² while other evaluations noted deficiencies in internal tracking, such as the absence of any formal budget line for implementing gender policy, which meant that there were no specific and traceable allocations within the system.¹²³

Among the evaluations reviewed, there are some emerging good practices. For example, AusAid and CIDA have put in place financial tracking through a marker on gender expenditures in interventions, although less detailed information is available on the administrative budgets of these organizations.¹²⁴ However, even when tracking systems have been put in place, they can be undermined by uneven record keeping and interpretation, as shown by the experience of DFID¹²⁵:

“... the system, or the way it is applied, has many limitations. The GE score mainly represents intentions at the project design stage and does not reflect the actual implementation of a project nor its achievements. There is also some evidence indicating that there are differences in the interpretation of GE markers (and hence inconsistencies in their application) between countries. This was evident in the Nigeria country study and in interviews with country office and HQ staff: ‘the markers are applied in a non-coherent manner’, was a typical comment. The gender marking of some of the Poverty Reduction Budget Support (PRBS) expenditure also supports the view that the GE marker is applied inconsistently. The PRBS to Uganda is ‘principal’ gender marked, the PRBS to Ethiopia is ‘significant’ gender marked, while more than 80 percent of DFID’s total PRBS expenditure is not gender marked at all. Altogether, the relationship between GE-marked expenditure, the incorporation of gender objectives into project documents and actual results is uneven.”

¹²² Norad (2005a: 7; 9); SIDA (2002a and 2010).

¹²³ ADB (2001: iii; 21–22); DFID (2006a: 33–34); UNDP (2006: 17); WFP (2008: 54–55; 83).

¹²⁴ AusAid (2008: 19); CIDA (2008: 10–12).

¹²⁵ DFID (2006a: 33).

Despite the problems with establishing how much and in what way financial resources are deployed, with or without hard data, most of the evaluations concluded that not enough financing was provided to mainstream gender equality. This was concluded on the basis of proxy indicators, such as (a) the level of human resources, training, and inclusion of gender in interventions¹²⁶; (b) inconsistent or lack of use of procedures and tools to enable gender mainstreaming; (c) lack of monitoring; and (d) absence of observable results. The recent WFP, UNICEF, and SIDA evaluations¹²⁷ are illustrative of some of the financing issues that contribute to mainstreaming failure:

WFP: “With a fixed budget structure and no line for the gender policy, WFP has not fully mainstreamed gender in budgeting or decentralized it at the operational level. This means limited opportunities to initiate opportune initiatives, adjust to changes, and meet emerging needs at the operational level....” (direct quote from interviewee)

WFP: “Resources have been inadequate for the Gender Policy implementation. HQ’s support for and commitment to the policy should mean: consultation, resources for programs, especially M&E and finally resources to target women.” (direct quote from interviewee)

UNICEF: “There is a gap between corporate policies and their practical implementation at the CO [country office] level, which is partly due to a lack of financial and technical resources. Support for gender mainstreaming is often hampered by the perception that it is a complex and redundant strategy in the face of high workloads. The unconditional support of senior managers at the CO level, which is necessary for effective implementation of the Policy, is not always forthcoming.”

SIDA: “At field level, a clear limitation is the lack of in-house capacities in terms of human and financial resources to provide ongoing support and coaching, given that SIDA does not have full-time gender advisers available in-house even for large country programs like Kenya and Ethiopia. There is also no flexible fund available to source such support from the outside.”

The financial challenges facing mainstreaming have been extensively reported in the past decade. A widely circulated EC evaluation¹²⁸ stated:

“Financial resources have also been seriously insufficient. Rather than increasing the budget allocation to gender to match the new demand, the main financial resource to support gender mainstreaming was reduced just at the moment when the program of action was required to come into effect.”

¹²⁶ BMZ (2006: 4); EC (2003: 24–25); Norad (2005a: 7–9); SIDA (2010: viii; ix); UNDP (2006: 14–19); UNICEF (2008: viii; x; 3–4; 38–39); WFP (2008: iii; 54–55).

¹²⁷ WFP (2008: 83); UNICEF (2008: 3); SIDA (2010: 18).

¹²⁸ EC (2003: 24).

In many organizations, evaluation findings on insufficient financing for gender mainstreaming have not led to an appropriate response. Whether this has been due to insufficient management commitment and resistance, or to weak evaluation systems, or both, is difficult for this review to determine.

4.4 Accountability and Incentives

Summary

A broad conclusion from the review of evaluations is that **gender mainstreaming has not been consistently incorporated into overall organizational reform processes designed to improve development effectiveness, but instead has been advanced as a separate category with no incentives or accountability.**¹²⁹

Many evaluations have echoed the Norad finding “that mainstreaming is an uphill struggle and requires top management’s commitment, middle managers’ priority setting, dedicated staff on the ground, and good management systems.”¹³⁰ Incentives are a potential tool to secure commitment and raise the priority of gender equality among the many other objectives of development institutions. It cannot be said that the evaluations of any agency found the full combination of incentives required to deliver on gender policy commitments.

Although the absence of incentive systems has been strongly emphasized by evaluators as one of the key factors limiting the achievement of gender equality results, it is important to note that discussions about the effects of such systems are almost entirely hypothetical. In practice, they do not seem to exist in any coherent form. For this reason, the status they have acquired as a solution to the broad failure of gender mainstreaming should be approached with some caution.

A number of concrete features would need to be included in institutional systems to generate a coherent response. These include (a) gender-focused terms of reference for staff and consultants; (b) support services to provide tailored expert advice; (c) time and financial budgets to enable quality implementation; and (d) incentive systems to provide motivation to personnel at all levels, who currently see gender mainstreaming as just one priority among many. The following section focuses on the importance of incentive systems and their relationship to accountability.

The Importance of Incentives

The importance of incentives for the success of gender mainstreaming was emphasized in 20 of the 26 evaluations.¹³¹ Most attention was focused on the role of incentives within donor organizations, although a few studies noted that such incentives are just as necessary in the ministries, departments, and agencies of partner countries, and in field-level implementing organizations.

The concept of incentives includes both direct and tangible benefits, such as pay level and promotion; and less tangible factors, such as professional recognition and increased budgets for activities seen to promote gender mainstreaming. In addition to personal incentives, the

¹²⁹ See for example, BMZ (2006); UNDP (2006); AusAid (2008).

¹³⁰ Norad (2009a: 7).

¹³¹ See, for example, Norad (2005a: 7; 57–58); DFID (2006a: xv; 26–27; 56–60); ADB (2001: 23); ADB (2009: viii; 6–7; 16); UNICEF (2008: 31–32); SDC (2009: 153; 283–284).

value of recognition or reward systems for high-performing teams, departments, or projects was widely noted. Staff interpreted the lack of such incentives as an indication of top management's lack of commitment. For example, in the EC evaluation¹³²:

“Staff members believe that gender is very low on the list of priorities of the institution. While there is widespread awareness of the necessity of making formal references to “gender as a cross-cutting issue” in texts, there are no incentives or encouragement to address gender substantively in the management of EC development co-operation.”

Institutional Commitment to Incentives and Accountability

An important consideration for gender mainstreaming is who has ownership of it within the organization. Is ownership clearly identified, and does the owning entity have sufficient weight to make things happen?

The absence of institutional commitment to gender mainstreaming has been recorded at all levels in donor organizations. In the EC, the commitment is seen as trickling down from top management to middle management, where gender has few to champions to bring in an element of distributed leadership. This supports the conclusion that “mainstreaming results and experiencing changes in gender equality on the ground require staff and other resources, especially at country level, as well as incentives to promote the pursuit of synergies between different goals.”¹³³ So the perceived lack of genuine commitment at the top of development institutions has been found to work its way down throughout the system, even to the field level.

This failure to institutionalize intentions to mainstream is well illustrated by the case of the World Bank, where the most recent evaluation found that¹³⁴:

“...the gender policy was weakly institutionalized within the Bank. The accountability framework, well laid out in the Gender Strategy, was not operationalized, and the monitoring system was not fully established. On gender-related staffing, budgeting, and partnerships, there is little information. At the corporate level, no control systems were established for gender integration.... Further, some Regional processes to monitor gender integration during the previous evaluation were eliminated during this period. Thus, there are few or no control systems at any level to ensure implementation of the gender policy.”

Even at the level of preparing policy and strategy documents, the inclusion of gender is seen as optional, since, for example, this “does not make any difference in terms of sanctions or rewards and recognition within the organization. DFID staff have acknowledged the fact

¹³² EC (2003: iv).

¹³³ EC (2003: 49).

¹³⁴ World Bank (2010: 34).

that there is too little or no incentive to address gender equality in policy and strategy work.”¹³⁵

Thus the absence of effective incentives to promote gender mainstreaming, which is a prevalent finding among the evaluations reviewed, forms part of a more all-embracing lack of commitment. The lack of incentives passively supports the failure to use the gender tools and procedures necessary to achieve results, the effects of which become self-reinforcing. As documented earlier, procedures and processes have been developed without clear accountability mechanisms to ensure their use, and this approach has not met with success. A Norad (2009) mid-term review of gender initiatives reports that GAPs were to be undertaken between 2007 and 2010, but that this did not happen because management resisted separate planning and reporting lines in the established reporting system; and there was no other accountability mechanism to force managers to follow the policy. The Norad evaluation concluded: “Using regular established management lines seems not to be easy when one wants to introduce new innovative thinking and practices/praxis.”¹³⁶

Lack of Monitoring as a Disincentive

Monitoring of mainstreamed programs is an important dimension of accountability, since it provides feedback on intervention progress and the foundation for lesson learning. As noted above, however, monitoring is often weak or non-existent. A vicious cycle is set in motion, in which the “lack of visible results in the field of gender equality (as a result of lack of monitoring and communicating results) serves in itself as a disincentive for staff to promote the gender equality in their work.”¹³⁷ In other words, the lack of reported results from gender work feeds a lack of interest in promoting such work, which in turn leads to a low level of results (see also 4.5).

Personal Development Incentives

Another prevalent aspect across the evaluations reviewed is the lack of gender specific-performance indicators in staff personal development plans, terms of reference, or job descriptions,¹³⁸ with the exception of those specifically engaged as gender experts. There is a need for clear guidelines on mainstreaming, strong incentive systems, and performance tracking to ensure that these mechanisms are producing the desired increased commitment and activity. A particular problem is that gender is largely absent from the competency assessments of senior management, who therefore rarely have sufficient knowledge or commitment to the area to ensure that those below them in the system are pressured to perform with regard to gender mainstreaming.

In addition to this gap in competencies, the evaluations found that few managers include gender as a key element of their annual objectives; and that this gap feeds into the objectives of the staff they supervise, who also largely ignore gender. For example, an evaluation in UNICEF found that only 2 out of 94 people interviewed (who were not gender focal points)

¹³⁵ DFID (2006a: 54).

¹³⁶ Norad (2009a: 39).

¹³⁷ SIDA (2010: 18). See also experiences of the World Bank (2010: 34–36).

¹³⁸ See, for example, DFID (2006a: 25); EC (2003: ix; 48–49); UNDP (2006: vi–x); SDC (2009: 31); SIDA (2005a: 81–82; 169).

had gender equality as one of their key assignments.¹³⁹ A WFP evaluation found that the inclusion of gender in individual performance tracking systems was “very low.” However, in order to appear to be in line with required competencies, staff indiscriminately scattered standard phrases from the gender policy in their performance tracking reports, in a manner that made it impossible to track actual capacities and gaps.¹⁴⁰ Such practices reduce the value of performance tracking tools to hold staff accountable for policy-related actions.

The evaluations found no clear accountability for implementation of the ubiquitous mainstreaming policies and strategies. Responsibility for their implementation is not included in the job descriptions, terms of reference, and personal performance targets that drive most development organizations.

Learning as an Incentive

Individual and group incentives to learn about gender equality and mainstreaming are also generally low; leaving the ubiquitous toolkits, manuals, and training on good practices to gender specialists and consulting staff,¹⁴¹ In UNDP¹⁴²:

“... the Gender Unit and Bureau for Development Policy practice areas provide guidance; there is an internet forum and country-based knowledge management networks. Guidance is also available in person from a variety of sources. However, staff have no incentive to use these resources or take opportunities for training.”

Learning is not mandatory but left to personal motivation, which reduces an institution’s capacity to implement its mainstreaming policy. This has been seen as particularly detrimental at the country office level, where learning incentives for gender mainstreaming approaches are seen as essential for the sustainability of positive gender outcomes.

Recognition as an Incentive

The increased focus on high-level development goals, notably the Millennium Development Goals (MDGs), has also been found to detract from monitoring of gender mainstreaming results. In DFID, for example, staff achievements are mainly rated by senior management in connection with their contribution to the Department’s Public Service Agreement, which only considers gender to the (limited) extent that the issue is specifically mentioned in the MDGs. This means, at the country office level, that gender is given a much lower priority than issues such as debt relief.¹⁴³

In some cases, decentralization of decisionmaking to the country level has allowed corporate policies such as gender mainstreaming to be pushed to the periphery, unless there are compulsory directives that they should be implemented as a matter of priority.

¹³⁹ UNICEF (2008: xiv; 34–35).

¹⁴⁰ WFP (2008: 161).

¹⁴¹ See, for example, World Bank (2010: 35–37).

¹⁴² UNDP (2006: vi; 14–15).

¹⁴³ DFID (2006a: 49–50).

Gender Equality and Development Effectiveness

The main opportunities to promote gender equality measures at operational levels come where there is clear evidence that they result in higher development effectiveness. Such improved results can generate recognition within the system, with its anticipated linkage to an improved career path. One of the overarching failures of mainstreaming gender has been the lack of clear results, which organizations do value and reward. If results were demonstrated more effectively, the impetus for gender mainstreaming would be greatly increased.

Recognizing Exceptional Work

Corporate awards or budgetary incentives could also raise the profile and status of gender equality. Discretionary funds, such as a Gender Challenge Fund or a Gender Awards Fund, could be set aside to reward exceptional work or support innovative programs.¹⁴⁴ Budgeting in general has not been widely used in support of gender equality work. An allocation solely for this purpose in program or project budgets, which would be lost if appropriate activities were not carried out, could provide a strong incentive to pay adequate attention to gender. Such resources should be earmarked and traceable, to allow for results monitoring and act as an incentive. If some units are enjoying additional budgets in recognition of the strength of their gender equality work, others would be motivated to step up their efforts.

Coherence of Mainstreaming Approaches

Few of the evaluations looked at the coherence of mainstreaming approaches across donor, country, and field implementation systems, as their focus was on mainstreaming within the development organizations themselves. However, even if the formidable barriers to effective mainstreaming within donor organizations were overcome, partner governments and field implementation agencies face as many or more challenges which it will take time to overcome. Box 2 shows some of the problems encountered at the country level.

The need to strengthen accountability at the country level has been inconsistently addressed. AusAid is one agency that has tried to do so¹⁴⁵:

“The aid program has taken steps to institutionalise a more consistent response, including, importantly, by improving accountability at [the] country program level through the annual program and thematic performance reporting processes. At [the] initiative level, the quality reporting process is proving to be a valuable accountability mechanism....Strengthened institutional processes and accountability mechanisms will continue be an important determinant of success. In the short term, attribution of gender equality results to Australia’s aid program will continue to rely on monitoring inputs and processes.”

Many evaluations covered by this review paid remarkably little attention to the need for incentives at the field level to include gender dimensions. The only specific observation on this issue is from the ADB¹⁴⁶:

¹⁴⁴ UNDP (2006: 46)

¹⁴⁵ AusAid (2008: 27–28).

“...although financiers may not favour the integration of microfinance with other projects, it provides a powerful incentive for women to form groups, associations, and cooperatives, and to become involved in community management activities. In gender-segregated communities, it also gives husbands an incentive to allow their wives to take part.”

Box 2. National Level Barriers to Gender Mainstreaming

The issue of national level barriers to gender mainstreaming was addressed in an Asian Development Bank evaluation, which included case studies of nine projects. The evaluation notes:

“A common problem observed in most of the nine projects evaluated was the difficulty government departments appeared to have in implementing the ‘software’ provisions due to institutional barriers. Design assumptions were made that the EAs [executing agencies] were committed to and could manage and supervise gender provisions, and that the IAs [implementing agencies] had the capacity to implement them. However, the incentive structure of the institutional system was not geared to achieving such implementation. (p. 22)

“There was insufficient policy commitment and too few staff incentives to achieve the gender objectives. Closer supervision from ADB is required, along with extra design components for training health staff to understand the need for innovation and change. New staff incentives are required in the structure and organization of health and family planning service provision, as the current system of incentives deters change. (p. 23)

“Developing member country [DMC] supervision of gender provisions, where included in projects, was less than satisfactory. Project designs assumed that the EAs were committed to, and capable of, managing and supervising gender provisions, and that implementing agencies had the capacity to implement them. However, the incentive structure and the institutional systems were not geared toward implementation of these provisions, and there was inadequate monitoring by ADB review missions.” (p. iii)

Source: ADB (2009).

At this field level, difficulties in recruiting female field workers also pose problems in many projects, where broader cultural norms restrict the activities of women. Again in the experience of the ADB, solutions were felt to be far away¹⁴⁷:

“Ultimately, the answers to providing female field staff for rural development programs and finding more responsive EAs and implementing agencies may lie in public sector reforms that permit greater flexibility in recruitment processes and incentives. Meanwhile, in the short term, ADB may have to consider training and employment of women field workers as an integral component of all rural development projects. In countries where the shortage of female field staff is not as problematic, the requirement to deploy or recruit and train women field staff should be included as a loan covenant.”

¹⁴⁶ ADB (2009: 15).

¹⁴⁷ ADB (2009: iii).

4.5 Results Reporting

“A gender problem is a problem for everyone and women’s issues are people’s issues.”¹⁴⁸

Summary

The evaluations tended to focus mainly on **process issues relating to mainstreaming, and how it is constrained by poor or non-existent monitoring and evaluation data.**

Where mainstreaming results are reported, they tend to be in traditionally strong areas for gender, such as education and health, where there is a good understanding of how gender equality improves results, and where there is clear donor and country ownership. However, mainstreaming results from these sectors have not been scaled up or transferred coherently to other important areas, such as infrastructure. **Furthermore, results tend to be reported at the individual project level, and are therefore easily atomized within and across organizations and not useful for dissemination or scale-up.**

Resonating with the earlier evaluation synthesis conducted by Norad,¹⁴⁹ this review finds that reported results in many evaluations tend to focus on women as opposed to gender, reinforcing the critique that GAD is largely reduced to WID in practice.

Limited, Fragmented, and Invisible Results

The recording and systematic documentation of gender equality results over time and across sectors would perhaps be single most powerful tool for development practitioners to give purpose and power to mainstreaming. However, one of the most common themes of this evaluative synthesis has been the lack of M&E and supervision systems across donor organizations, which has resulted in limited, anecdotal reporting and often invisible results. As noted above, lack of monitoring creates a vicious cycle of disincentives to integrate gender into the design or implementation of interventions (see 4.4). It also constrains the production of good practices and an evidence base from which inspiration can be taken and disseminated across organizations.¹⁵⁰ The second evaluation of SIDA’s gender policy,¹⁵¹ completed in 2010, is illustrative of the challenges:

“In the absence of country-level gender strategies and indicators, it is difficult to assess the overall results in gender especially in relation to Sweden’s four priorities for gender equality. There is also no framework by which individual projects can assess progress toward these objectives, share lessons learned, or identify synergies among projects. In general, gender objectives and indicators are weak or non-existent, and are consequently rarely monitored or reported on.

¹⁴⁸ ILO (2005: 16).

¹⁴⁹ Norssad (2006: 10–12).

¹⁵⁰ See EU (2003: 22–23; 52); DFID (2006: xiii; 20–21); ILO (2005: 9–11); Norad (2005: 8; 41); Norad (2007: 7); SDC (2009: 285).

¹⁵¹ SIDA (2010: vii).

As a result, many of the good gender results encountered were at an anecdotal level and were invisibilized. There [was no] feedback into institutional learning nor was there any [attempt to] demonstrate the impact of gender equality on development results.”

Furthermore, evaluations spanning the last decade indicate that donor organizations have major internal challenges to disseminating results even when they are well documented—often in traditional areas such as the education and health sectors.¹⁵² For example, the third World Bank gender evaluation (2010)¹⁵³ stated:

“Quantitative data to help understand results were available mainly for outcomes in health, education, and labor force participation. The evaluation had to rely on qualitative data in other areas.”

In the World Bank, where there is a strong internal cultural bias toward quantitative data, the lack of such data outside of health and education creates a barrier to mainstreaming gender in other sectors, since qualitative results are often perceived as lacking rigor, rendering results less powerful and/or invisible.¹⁵⁴

In DFID, the documentation of results in education and health sectors has dominated mainly because of a narrow view of gender mainstreaming based on the MDGs. DFID’s significant experience in gender mainstreaming in those sectors has reinforced this bias. In contrast, results monitoring in other sectors, such as pro-poor growth and budget support (see Chapter 5), has been much less systematic. “The narrower the interpretation, the more limited its [gender] application will be as a result.”¹⁵⁵

Where gender results are reported, they tend to be at the micro or project level and retained at the country or sector level. There are few reporting tools or systems for aggregating data at the central level to demonstrate a coherent response to gender policy objectives and expected results. The effect of this has been the fragmentation or isolation of gender equality results across organizations, with no clear picture of what works and why for the purposes of scaling up or learning.¹⁵⁶ UNICEF’s experience¹⁵⁷ is illustrative:

“The organizational review noted a general need for UNICEF to be more systematic in its sharing of good practices, etc. The self-assessment exercise similarly concluded that knowledge management systems for gender mainstreaming did not provide enough information to build UNICEF staff competency to effectively implement the 1994 Policy. This is particularly important for gender equality as the majority of UNICEF’s successes in increasing gender equality through its programming take place in relative

¹⁵² ADB (2009: 29–34); AusAid (2002: 8); DFID (2006a: 20 – 21; 52); EU (2003: iii; vii; 52); UNDP (2006: vii; 24); World Bank (2005: xiv; 41–47); World Bank (2010: 41–46).

¹⁵³ World Bank (2010: 42).

¹⁵⁴ See also CIDA (2008: xv – xviii) for problem of results invisibility.

¹⁵⁵ DFID (2006a: xiii; 21–23; 38–39).

¹⁵⁶ See for example, CIDA (2008: 64 – 65); UNICEF (2008: 40)

¹⁵⁷ UNICEF (2008: 40)

isolation, primarily (although not exclusively) at the country level. It is currently not possible to capture many of these lessons learned and good practices in UNICEF's existing reporting systems because explicit gender equality results are often not included in programme documentation."

Only the AusAid and CIDA evaluations¹⁵⁸ pay some attention to the underlying challenge of achieving gender equity results, which requires a long-term perspective that goes beyond the traditional three to five-year lifespan of most interventions, and also beyond normal practices of monitoring and evaluation:

"Inequality is the product of a complex web of forces and cannot be addressed by isolated interventions. There is real debate about what equality between men and women should look like across regions and within each nation. In addition, equality is a long-term goal that must be seen as the work of generations. The complexity and long horizons make the identification and assessment of results inherently challenging, particularly over the short term."

This would seem to imply that donor organizations need to make more substantive time commitments to achieve gender equality in their programming, and should place the emphasis on building sustainability over a 10 to 20-year timeframe.

Women's Results not Gender Results

In line with Norad's earlier evaluation synthesis,¹⁵⁹ the review found a strong propensity for results reporting to be focus exclusively on women, with less attention given to men or to changes in gender relations between women and men.¹⁶⁰ There are multiple reasons for this. First, gender mainstreaming is often misinterpreted as a focus on women, due to an operational culture that tends to favor WID and is slow to adopt new concepts of gender and ways of working. For example, the World Bank gender evaluation from 2005 showed that throughout the 1990s, Bank operations placed a strong emphasis on WID despite the conceptual and practical criticisms of the approach that emerged during the 1980s, and the consequent development of GAD.¹⁶¹ Second, the women-only focus seems to be reinforced in many donor organizations through the dominance of women-centered education, health,¹⁶² and micro-finance sectors interventions, which offer relatively straightforward but narrow women-centered design and implementation opportunities. DFID's experience illustrates the ways in which WID approaches exert a simplifying influence on both DFID and country strategies¹⁶³:

¹⁵⁸ AusAid (2008: 8); CIDA (2008: 64–67; 75). The CIDA evaluation discusses the link between results measurement and , sustainability, and measurement.

¹⁵⁹ Norad (2006: 9).

¹⁶⁰ ADB (2001: 29); CIDA (2008: xv; 50–56; 84–88); DFID (2006a: 21–22); EC (2003: v); ILO (2005: 16); UNDP (2006: vii) UNICEF (2008: viii); WFP (2008: 59–60).

¹⁶¹ World Bank (2005: 34–36).

¹⁶² Ibid: 34–36; DFID (2006a: 21–22).

¹⁶³ DFID (2006b: 22). Similar findings were also reported in the Ethiopia and Mozambique case studies

“In the Tanzania PRSP, references to gender aspects are almost absent. The only exceptions are: ‘Achieved gender equality in primary and secondary education by 2005’ and ‘reduced maternal mortality.’ Moreover, the approach resembles that of the Women in Development (WID) approach with its narrow focus on women rather than gender. In addition, the PRSP does not seem to recognise that other initiatives (e.g., infrastructure services and micro-finance facilities) are not gender neutral and have gendered implications....

“[Although] DFID’s key poverty reduction policy paper [“Eliminating World Poverty: A Challenge for the 21st Century is not a justice or human rights policy paper, it] addresses some of the gender equality concepts in the justice and rights field by recognising that poor people— particularly women—are the most vulnerable to all forms of crime and civil conflict, including domestic violence; and that in very many cases formal justice systems fail to protect them.

“The White Paper’s inclusion of a women’s focus in relation to justice is the result of internal and external negotiations and lobbying. There was not necessarily a clear consensus at the time as to which gender-related concepts to include. Some groups lobbied for gender equality following the momentum achieved as a result of the Beijing conference in 1995, while others were more in favour of retaining a strong women’s empowerment focus. A weakness of the paper is that it failed to integrate the progress made in Beijing in terms of making a clear transition from or alternatively explaining the co-existence [of the] WID and GAD approaches to development.”

DFID’s internal experience points to the third factor involved in the reduction of GAD to WID. The UNICEF, UNDP, and WFP evaluations¹⁶⁴ report that the understanding and conception of gender and gender mainstreaming is often uneven within donor organizations. In-depth knowledge of approaches to including gender in interventions often resides with a few gender specialists. With a lack of specific knowledge, coupled with time and budget constraints, operational staff are more likely to fall back to an WID-like approach, which leads to WID-like results.

The challenge of putting in place monitoring and supervision systems that can provide gender-disaggregated data, to enable the reporting of gender-sensitive results, was an issue in all evaluations. Because of the lack of attention to this area, those results that are reported tend to be focused on the easiest relevant point—women—whose participation and receipt of project benefits can be most easily quantified at an output level. The result, however, is that gender equality results are invisible. In the absence of gender-sensitive monitoring and evaluation it becomes difficult to recalibrate the system to achieve more. Again, UNICEF’s experience illustrates this point¹⁶⁵:

¹⁶⁴ See, in particular, the discussion in WFP (2008: 59–60).

¹⁶⁵ UNICEF (2008: x).

“In particular, annual reports tend to report mainly on the participation levels of boys and girls or women and men as opposed to qualitative changes in gender equality. Specific programmes show little analysis of whether programme activities would affect girls and boys and men and women differently, and there is limited analysis of the underlying causes of gender inequality and how these should be addressed.”

5. CHALLENGES AND OPTIONS FOR GENDER MAINSTREAMING

The concluding chapter focuses on three issues. First, it looks at the emerging evaluative data on the challenges and opportunities of integrating gender into new aid modalities. Second, it looks back to the roots of mainstreaming failure, with emphasis on four aspects: (a) the disconnect between theory and practice; (b) priority overload within development organizations; (c) leadership failure; and (d) evaluation failure. The chapter then discusses some emerging organization-wide good practices that, if applied more broadly, have the potential to put gender mainstreaming on the road to results. Finally, it looks briefly at possible options to break through the persistent barriers to gender mainstreaming.

5.1 A Place for Gender in the New Aid Architecture?

This section looks at the emerging evaluative data on mainstreaming gender equality into the aid effectiveness principles of the Paris Declaration,¹⁶⁶ and new aid modalities such as GBS, PBL, DPOs, and SWAps.¹⁶⁷ The data points for this part of the synthesis are limited, with only CIDA, DFID, Norad, SIDA, SDC, and the World Bank providing some observations from the field level.

Several key challenges emerge from these evaluations:

Ownership and alignment through the Poverty Reduction Strategies (PRS) has resulted in gender equality being pushed further down the list of priorities for partners that do not make it a priority in their PRS. SIDA, CIDA, and DFID reported that ownership of gender equality issues is often seen to reside with the donors and not with the country:

*“Gender is an area that is frequently seen as donor driven. Even where governments have signed and ratified all the international agreements, and promote gender equality in national legislations, ownership may still be weak due to factors such as a low priority on gender in face of a range of demands, lack of capacity or experience, or a general feeling—not unusual in male run governments—that it is a women’s problem.”*¹⁶⁸

Consequently, the design and implementation of new aid modalities¹⁶⁹ that respond to the PRS¹⁷⁰ tend not to systematically mainstream gender equality. DFID found that the extent of gender orientation in budget support depended on the quality and depth of its integration into the country PRS, noting:

“It requires considerable effort (policy dialogue, influencing and advocacy) to make the implementation of the PRS more gender focused than the PRS itself.”

¹⁶⁶ Ownership, alignment, harmonization, managing for results, and mutual accountability,

¹⁶⁷ Designed to operationalize and support implementation of the Paris principles in accordance with national Poverty Reduction Strategies (PRSs) and partner country-led programming.

¹⁶⁸ SIDA (2010: 25). See also similar comments in DFID (2006a: 17) and CIDA (2008: xi; xxvi).

¹⁶⁹ See also UNIFEM (2006).

¹⁷⁰ CIDA (2008: xxvi; 146–149); DFID (2006a: 12–19); Norad (2005a: 56); Norad (2009a: 24); SIDA (2010: 24–26).

*Hence in view of the generally limited attention given to gender issues within the PRSs examined, ... DFID's ability to promote GE through PRBS and to assess achievements needs to be strengthened and better documented....We found no evidence on the impact of DFID's work on GE in any of the documents reviewed for the study. In Mozambique, DFID decided to provide PRBS knowing that Mozambique's PRS is largely gender blind....The evidence from Uganda shows that stakeholders in the PRBS arrangements were principally concerned with fiduciary risk, budgeting and financial management....*¹⁷¹

Ownership and mainstreaming of gender tend to show better performance in DPLs and SWAs, which can be targeted at specific sectors; but it is not surprising that gender fares best in education and health, as it does under project-based interventions in the same sectors—and for similar reasons.¹⁷² A World Bank evaluation (2010) reported that out of 307 DPOs, gender concerns were mainstreamed in 53 of them (17 percent), with the majority being in the education, health, and social safety net sectors. Gender concerns were said to be mainstreamed if the DPO included at least one women-in-development or gender-related measure. These measures constituted less than 1 percent of the total measures designed in all DPO operations.¹⁷³

Building ownership of gender in new aid modalities is also reported to be difficult because of the amount of front-end analysis and work needed to mainstream gender into the objectives, actions, indicators, and resource allocations of these types of aid. Therefore, demonstrating to partner governments that gender-sensitive modalities can result in sustainable outcomes has been difficult as well.¹⁷⁴ Some evaluations¹⁷⁵ have reported that “non-technical” operational staff do not have the appropriate analytical tools and procedures to integrate gender into GBS or PBL. Furthermore, many of the procedures and tools developed to conduct gender analysis, such as plans, checklists, and training are still focused on traditional project approaches and have not yet caught up with the new aid modalities.

Harmonization and dialogue are important to ensure alignment between donor and government priorities in the design and implementation of new aid modalities. The evaluations found that the extent to which gender is mainstreamed into dialogue with partner countries receiving this type of aid is variable, because (a) not all donors place equal importance on including gender in the new aid modalities; and (b) as noted above, many partner governments do not demand it through their PRS. In such situations, gender tends to be left to the attention of the particular donor or group of donors that want to support it. SIDA

¹⁷¹ DFID (2006a: 16–17).

¹⁷² Noted by DFID (2006a and 2006b); SIDA (2010); SDC (2008); and World Bank (2010) in relation to SWAs and DPOs.

¹⁷³ World Bank (2010: 28–30). DPOs implemented between 2002 and 2007 constituted 33 percent of all Bank lending.

¹⁷⁴ This may also be related to weak economic and sector analysis not making the gender case, and, in equal measure, to priority overload within partner governments.

¹⁷⁵ CIDA (2008: 77; 146–149); DFID (2006a: 49); Norad (2009a: 53); SDC (2008: 74); SIDA (2010: 26–27).

(2010) has taken positive steps in this regard, in relation to the design of multi-donor operations in Ethiopia¹⁷⁶:

“SIDA’s key challenge in donor harmonization is the level of heterogeneity of the donor community in terms of its understanding and prioritizing of gender equality. Its response is to work most closely with a group of like-minded donors... which have dedicated resources to mainstream gender in dialogue, to influence the donor groups to take a strong and effective joint approach. Largely with CIDA and Irish Aid support, the Productive Safety Net Program (PSNP) donor group was able to carry out a gender analysis of the program which provided documented evidence for dialogue on gender results with the donor group and government, and to improve the incorporation of the gender in the PSNP II.”

Once the implementation of budget support began, however, joint donor supervision missions tended to focus on administrative issues rather than tracking progress toward outcomes. Irish Aid noted¹⁷⁷ the problem and circulated preparatory notes on gender prior to each mission, to ensure that it was included in monitoring. Although such backstopping is clearly needed, the Irish example illustrates that, as in traditional projects, gender can be integrated into design, but without consistent attention and a champion during implementation, it can be easily sidelined.

One of the issues highlighted by SIDA, Norad, and DFID¹⁷⁸ is that the dialogue required to get gender a place at the table during the design of budget support operations requires the presence of staff with the requisite commitment, seniority, and technical and tactical knowledge to influence the process. Unfortunately, however, resources are not always available at the right level or are spread too thinly; so opportunities to harmonize gender into new aid modalities are missed, moved to the periphery, or left to the attention of a single donor. Given the low overall priority of gender equality at an organizational level and in traditional project-based approaches, it is not surprising that efforts to harmonize and promote gender-sensitive dialogue on new aid modalities are proving challenging.

The evaluations indicate that **managing for results and accountability for results** in relation to gender equality are still, at best, works in progress, and at worst not even on the agenda. Results and M&E frameworks still reflect the bias toward promoting gender equality in traditional areas. The World Bank’s experience is typical¹⁷⁹:

“In assessing results of Bank support, IEG [the Independent Evaluation Group] examined 29 closed DPOs in 8 of the 12 focus countries. Gender-aware DPOs helped deliver results in education and social protection in Bangladesh, Benin, Ghana, Peru, and Turkey. Outside these areas, it was less common to find evidence of any sustained results. In Yemen, for example, a DPO supported studies on gender and land, but there was little evidence of gender-aware

¹⁷⁶ SIDA (2010: 26 – 28).

¹⁷⁷ Ibid 27 – 28

¹⁷⁸ CIDA (2008: 77: 144–146); DFID (2006b: 16–17); Norad (2009a: 53) SIDA (2010: 26).

¹⁷⁹ World Bank (2010: 52)

outcomes. In Benin, there was some discussion of gender-aware interventions in the water sector, but, once again, ICRs [implementation completion reports] did not discuss the issue.”

More often than not, gender equality is still not systematically included in M&E frameworks for budget support, even where it is relevant to do so.

Within the increasing focus on managing for results using the new modalities, gender equality sits somewhat uncomfortably. It requires a long-term sustained commitment, yet donor organizations operate on short-term planning, funding, and operational cycles. Many new aid modalities are also rapid-disbursing interventions with a short timeframes, which in itself presents serious results measurement difficulties, even without considering gender. Neither donor nor country M&E systems are currently set up to systematically track long-term progress toward gender equality. Furthermore, subtle changes in gender equality relating to power between men and women are not amenable to donors’ traditional concentration on measuring only what can be counted, with minimal reflection on qualitative data. The pressure the Paris Declaration places on donors to show results may well cause them to shy away from promoting changes that are difficult to measure, including changes in gender equality in all but the most straightforward sectors.

Despite the challenges outlined above, the aid effectiveness principles and new aid modalities have offered some opportunities to strengthen gender mainstreaming, as outlined in the SIDA evaluation.¹⁸⁰ Based on a limited number of cases, the evaluation found that the new aid modalities:

- Encourage a more participatory and coherent poverty reduction strategy, resulting in increasingly mainstreamed policy commitments in national development policy and planning;
- Encourage shared analysis and a more coherent approach to policies, including gender equality, particularly if it is incorporated in the PRS and supported by national leadership;
- Provide a more comprehensive framework for dialogue on gender issues;
- Promote and demonstrate gender results, if gender is incorporated into results frameworks at the national or sector level and monitored effectively.¹⁸¹

The first step, however, is for gender to be included in the policy dialogue, so that it can be incorporated into PRSs and other national policies that feed into the development of PBL, GBS, and SWAp interventions. The most coherent approach would be to continue to build on SWAps in the education and health sectors, and integrate gender into policy reforms and government capacity building related to those sectors (see 5.3).

¹⁸⁰ SIDA (2010: 26, Table 2).

¹⁸¹ Although these opportunities are encouraging, they are based on a limited set of observations, and, as expressed by CIDA (2008: 146), “the jury is still out” with regard to mainstreaming gender into new aid modalities.

5.2 The Roots of Mainstreaming Failure

Too Much Theory To Practice

Gender mainstreaming is in large part a theory about how development assistance can be more effective, efficient, inclusive, and equitable in its delivery and results. It is a more complex and all-embracing theory than the one it replaced—the women in development (WID) theory.

WID tried to ensure that women would be included in development interventions and thereby receive a fair share of the benefits. The aim was to move development from a situation of gender blindness or male centeredness to one in which the particular needs of women were addressed—with the increased role of women, particularly in economic activities, leading to women's empowerment. Moving women from silent partners to full participants in development activities would improve overall development effectiveness, because a more complete range of stakeholders would benefit.

The idea that including women fully in activities would improve development effectiveness was not in itself threatening at any of the key levels in the process—national governments, managers of development institutions, or field staff. The additional work involved in WID could be reduced by attaching WID elements to more traditional development approaches and projects. Furthermore, in terms of monitoring, the effects of a WID approach on an intervention could be quite easily counted by seeing the extent to which women had participated and what benefits this had brought. Such results could be easily aggregated to show the cumulative benefits to women from a project, development agency, NGO, government, or other entity.

The WID approach also had other advantages. It was easy for stakeholders to understand; and from a management perspective, it presented opportunities for substantial gains with minimal organizational change. However, WID required human and financial resources, and these resources were eroded as other priorities were promoted. Over time, it was found that WID was not having the degree of impact that it once had. It had become marginalised in development organisations, and its results were mainly disconnected and individualized benefits to target groups of women. There was little evidence that the root causes of gender inequality were being addressed. Top management gradually replaced WID with other issues that were seen as more important for the reputation of their organisations.¹⁸²

The response to the decline of WID was the concept of gender and development (GAD), which introduced a more complex and fundamental critique of development processes and assistance. While WID had never attempted to change the underlying dynamics of power and inequality in societies—and therefore had not moved social structures significantly toward gender equity or truly equal opportunities—GAD introduced explicit analysis of power imbalances within societies on the basis of attributed gender characteristics and roles.

¹⁸² See, for example, Netherlands DGIS (1995); and Staudt (1981) for a non-evaluative case study of WID in USAID.

Despite its more comprehensive approach, however, GAD has fared no better than WID, and is perceived to have some inherent disadvantages compared to its predecessor. First, GAD is seen as a concept that is driven by intellectuals and is difficult to operationalize. The evaluations noted that development organization staff did not always understand GAD, and regarded it as a concept whose interpretation is often “down to the individual.”¹⁸³ Consequently, most donor interventions have lacked the level of coherence and sensitivity necessary to achieve or report GAD-related results.¹⁸⁴ Further, GAD is often perceived as just another new concept, and many governments still prefer to think about women in development rather than gender.¹⁸⁵ Second, GAD approaches appear to challenge male dominance at all levels. Evaluators have noted the paradox of male-dominated donor organizations pressuring partner countries to undertake serious analysis of their gender-based power structures, and to make changes to better reflect equality concerns. Partner country governments have not always been inclined to change their national power structures to conform to the latest donor imperatives. In addition, local-level partners, with the exception of some gender-focussed NGOs, also felt little commitment to the GAD agenda, and it became difficult to ensure field-level delivery on this new priority. In practice, many projects have reverted to WID principles, ensuring some role and benefits for women and reporting these under the GAD banner (see 4.5).

Having introduced a theoretically driven approach calling for detailed social analysis and fundamental changes in power structures, donor organizations exacerbated the situation by requiring these to be mainstreamed within their own internal structures and interventions. This would require that a gender perspective be introduced into all aspects of the organisation’s activities, from policy to field level, with the aim of getting partner governments and other stakeholders to follow the same path. In theory, gender would become so entrenched in the thinking and actions of all stakeholders that the necessary processes of social, political, and economic change would follow in due course. But the theory has not been widely adopted in the development field, and based on the multiplicity of findings presented in this report, three key issues that have contributed to this failure.

Too Many Priorities to Mainstream

A major challenge to gender mainstreaming, reported widely in evaluations, is the strong perception of “priority and/or mainstreaming overload” felt by staff throughout development organisations (see 4.1 and 4.2). Each priority comes with associated policies and procedures, backed up by tools and often training. Once the first wave of organisational enthusiasm for a new priority subsides, staff take stock of where the issue settles in the hierarchy of concerns of top management and their own immediate managers. The great majority of evaluations

¹⁸³ Individual interpretations of gender equality are widespread even if development organizations have a gender policy and clearly mapped out the concepts and practice. This is due mainly to the voluntary nature of such policies, under which almost anything from WID to GAD can fit operationally.

¹⁸⁴ See for example, CIDA (2008: 26; 80); DFID (2006a: xiv; 50); EC (2003: iii; viii; 31); SDC (2009: 27; 33; 89; 111–112; 121; 153); SIDA (2002a: xiv;); SIDA (2010: 12; 27); UNDP (2006: vi; ix; 15–16; 40); UNICEF (2008: viii; 3; 31–32; 38; 43); World Bank (2010: 14; 61).

¹⁸⁵ ADB (2009: 23); CIDA (2008: 74; 81; 104; 139); DFID (2006a: xiv; 50); Norad (2005a: 26); Norad (2006: 41; 43); SIDA (2002a: 72–73).

reported that, once pressures associated with specific initiatives or events have passed, gender falls to a relatively low position in the order of priorities, as a “cross-cutting issue” to be attended to in niche sectors of education and health, but very much an optional and frequently forgotten issue in others.

Some evaluations noted that gender is not incorporated into the MDGs, except for health and education, and that the MDGs, along with issues of aid effectiveness, frame the areas of concentration for most major donors.¹⁸⁶ As more organisations try to establish the meaning of development effectiveness for such modalities as general budget support (GBS), policy-based lending (PBL), and sector-wide approaches (SWAs) (see 5.1), the position of gender on the development agenda is likely to fall further. Faced with many pressing and complex issues, all levels of management have to make decisions concerning where to put their resources, including staff and administrative budgets. Even managers who may want to make gender a priority often struggle to do so because they cannot easily locate appropriate technical expertise or overcome internal resistance and competition for resources. This is a knock-on effect of the inadequate resources devoted to gender in the first place, because of its low priority among top management.

Management Failure

The key challenge to gender mainstreaming has proved to be the failure of top-level management to move beyond policy and rhetoric and fully commit to the organisational changes, staffing, and resources that mainstreaming requires. Most of the tools and procedures created to facilitate implementation of gender mainstreaming have failed, largely because they have not been applied consistently over a long enough period, but rather in a fragmented and occasional manner. Coherent management strategies for sustained implementation of gender mainstreaming have been absent from the development field.

One of the common tools applied by management is the Gender Action Plan (GAP). Although GAPs are currently seen as the solution to mainstreaming failures, the existing evidence indicates that GAPs have also lacked a results orientation, have been inadequately resourced, and have not been supported by incentive structures to encourage their consistent use. Although they are in theory a good technical fix, they are also likely to fail if management does not address the underlying structural causes of mainstreaming failure.

Gender analysis is another tool commonly used to achieve mainstreaming. The evaluations found that gender analysis has mostly been applied at the level of individual interventions, but rarely in a sufficiently detailed manner to allow effective and system-wide integration of gender issues. Even in cases where gender analysis has been effectively undertaken at the project design stage, its findings are rarely followed up during implementation or monitoring. Furthermore, whatever gender analysis is undertaken usually misses the fundamental and distinctive element of the approach, namely analysis of the power relations of society. Thus, this aspect of gender mainstreaming is often actually implemented through WID analysis, designed to increase women’s share of benefits, thereby negating the original advances intended to be delivered under the GAD approach. Gender analysis has not therefore made a substantive contribution to mainstreaming (see 4.1 and 4.5).

¹⁸⁶ See DFID (2006) and SDC (2009).

The next array of support systems for mainstreaming consists of handbooks, guidelines, manuals, and toolkits. These have often been of good quality, but evaluations have found them to be infrequently used by their target groups. Barriers include the view that they have been handed down from headquarters “experts” to country and local level, where they do not address the relevant issues or are not culturally adapted; and that they are out of date by the time they appear and have only peripheral relevance in the light of new aid structures and modalities.

Checklists are another tool that has been widely installed in administrative systems. They have largely been used as a project cycle screening tool, intended to ensure that official requirements for gender inclusion have been followed in project concepts and designs. However, since the staff of international development agencies are well practiced in complying with official requirements, the checklists soon fall into the category of administrative rituals. Since the checklists are only used at the design stage and usually have no carry-over into project management and monitoring, they are not valued by staff. In addition, staff in many organisations noted that there is no push from management to make any constructive use of the checklists, so they are rapidly lost in the background noise of the increasingly complex system of management and administration.

Training is another tool put in place by management to mainstream gender and development. Evaluations have noted good practice in this area; however, training is fragmented across different parts of the organisations and knowledge and learning are not aggregated. Therefore, GAD training has not made any substantial difference in the way gender equality is promoted within and by development agencies. Furthermore, such training was rarely found to be readily available at the country level; it was often of a generic nature and did not fit the needs of staff at different levels and locations; and did not get down to the field level, where new approaches to gender are ultimately delivered. Overall, the evaluations showed that there is no simple solution to the problem of where gender training fits in development organisations; and that even if training is carried out, it often runs into resistance or disinterest at the level of partner governments. This in turn gradually lessens the commitment of country-level staff, who must promote a broad range of policy imperatives.

The mainstreaming approach has also largely defeated the intentions of results-based management (RBM) systems. In the absence of strong gender analysis, the monitoring of gender results is typically weak at activity level. Some country offices have attempted to assemble some results data, but the effort is so unsystematic that the data cannot be accurately scaled up to the country or regional level. Where aggregated gender results are presented, they are almost inevitably based on poor quality data. Thus it is extremely difficult to assemble a coherent body of good practice or go beyond the evaluation of process (see 4.1 and 4.5).

Overall, having decided to mainstream gender, management has typically put in place a repertoire of tools designed to achieve that goal. However, management has not supported these tools with adequate staffing, resources, or budgets; there are weak mainstreaming strategies, unsupported and largely unmonitored GAPs, and few accountability systems to measure performance. Furthermore, it is clear from the many evaluations reviewed that all levels of staff in donor organisations develop a sense of management’s real priorities and of

the rewards for focusing on those priorities. In no evaluated case was gender mainstreaming reported by staff to be seen as a true and consistent priority of top management. This was because of the lack of incentives, recognition, or accountability on the issue. High individual or unit performance on gender was therefore seen to be driven by strong personal interest or by individuals for whom gender is a monitored performance area (see 4.2 – 4.4).

Evaluation Failure

Evaluations of gender mainstreaming have often noted that evaluation itself has failed to systematically incorporate the issue into its body of evidence. Outside of specific gender policy and/or mainstreaming evaluations, evaluation offices of donor organizations have tended to place gender on their list of topics for occasional coverage, rather than integrating it systematically into all their evaluative work. Specific thematic evaluation of gender have been relatively infrequent, although AusAid, ADB, Norad, SIDA, and the World Bank now have a series of such evaluations. These evaluations have made it possible for the organizations to at least track internal process responses to gender mainstreaming. But with the exception of AusAid (see Chapter 4), these evaluations show many reoccurring challenges.

Evaluation failure falls into two main categories: (a) failure to evaluate; and (b) failure to respond to evaluation findings. First, gender is rarely a priority for evaluation offices, and terms of reference for regular project or thematic evaluations do not systematically require gender effects to be addressed, even where this is an organizational requirement. Second, the management response to evaluation findings on gender has usually been minimal or ineffective. For example, SIDA, Norad, and the World Bank's series of evaluations on the topic reported similar findings each time.¹⁸⁷ This shows that evaluation findings do not, in themselves, necessarily lead to improved systems and practices. In response to the evaluations, senior managers at those organisations conveyed a renewed commitment to gender (e.g., the GAP) and promised to do better in the future.¹⁸⁸ But they did little to improve the underlying corporate accountability or incentive structures that would drive real change, preferring to apply technical fixes that have little organisational impact.¹⁸⁹ Therefore, no substantial change occurs, and gender mainstreaming continues down the road to nowhere.

The failure of evaluation is often compounded by lack of follow-up, through subsequent evaluations, in order to improve the effectiveness of interventions. Although it is encouraging that some organisations have been proactive in responding to evaluation findings, only AusAid seems to have made the important link between accountability for implementation and the use tools such as GAPs and gender analysis, on the one hand, and the improved effectiveness of interventions, on the other. In contrast, the World Bank and SIDA approach of launching successive waves of thematic evaluation seems not to have had the same impact on management, perhaps because the period between evaluations is too long, and the

¹⁸⁷ See Norad (2005a; 2009a); SIDA (2002a; 2010); and World Bank (1995; 2005; 2010).

¹⁸⁸ See World Bank (2010). World Bank management envisioned a monitoring framework and accountability system to support implementation of the 2001 Gender Policy, but neither materialized.

¹⁸⁹ Norad's (2009a) mid-term evaluation of its GAP shows indifferent organizational response to the previous (2005a) evaluation and to the action plan.

evaluations themselves tend not to focus on failures in accountability and management. These are often uncomfortable and difficult issues to evaluate compared to the effectiveness of projects and processes. The latter are more familiar ground for development evaluators, most of whom are not organizational performance or change management specialists.

5.3 Good Practice and Options—What Next for Gender?

The final section presents some good practices and options for mainstreaming and harmonising gender equality across donor organizations.

Good Practices

Many of the evaluations contain lessons and good practices related to gender equality in the design and implementation of interventions. However, the focus below is on organization-wide good practices:

- **Linking accountability to the implementation of measures to support gender equality:** *AusAid* is currently the only donor organization to report on enhanced resources, processes, and accountability mechanisms at the managerial level to ensure more systematic mainstreaming of gender equality through GAPs and results reporting. Measures have included (a) raising the profile of gender equality to “an overarching principle of the aid program,” so that senior and middle management are directly responsible for implementation and results; (b) a quality reporting tool to improve results reporting and focus on accountability; and (c) an increase in the number of gender specialists from one to six persons, including at the director level.
- **Use of trust fund resources to support gender mainstreaming:** *ADB*, which has small cadre of permanent gender specialists at headquarters, has used trust fund resources to recruit gender specialists at the country/regional level to support gender mainstreaming in interventions. The use of nationally recruited gender specialists has resulted in great contextual relevance to gender equality programming.
- **Use of Gender Action Plans at the intervention level:** *ADB* has institutionalized GAPs for projects as part of the design process, although links to accountability to ensure systematic follow-up during implementation are still incomplete. Taking GAPs to the micro level may be good approach to promote gender equality concerns in projects from a relatively low baseline organizational situation; but in the long term, gender will need to be included in staff performance evaluations to ensure that procedures are backed with regularized action.
- **Use of follow-up mid-term reviews and/or annual performance reports to put additional pressure on management:** *AusAid* and *Norad* have followed up evaluations with mid-term or annual performance reports. *AusAid*’s linkage of performance reporting to accountability mechanisms provides a strong push to management on mainstreaming. *Norad*’s mid-term review of the organization’s GAP ensured that gender remained in sight of management; but the GAP still is not linked

to any clear accountability framework, and hence has not been an effective agent of change.

- **Drawing on positive experiences in the education and health sectors, and transferring lessons and good practices more systematically to additional sectors:** Many of the evaluations highlight the need to take experiences from education and health sectors and apply them more broadly. However, given the challenges of a broad mainstreaming approach, a good option would be to focus on gender one or two additional sectors, in line with resource and leadership commitment (the “gender focusing” option; see below).

What Are the Options for Mainstreaming Gender?

Given the substantial challenges that have prevented gender mainstreaming from operating effectively, the evaluation evidence suggests that it may be time to adopt a different approach. The bottom line is that gender mainstreaming in development organizations requires the full commitment of management, including top management; and that this commitment must be converted into (a) human and financial resources; (b) accountability and incentive systems; and (c) detailed planning, implementation, monitoring and evaluation. In essence, there must be major organizational change. To date, progress along these lines in almost all agencies has been minimal; and in those agencies that have done a series of evaluations over time, it is also clear that such progress has not been cumulative. The World Bank’s experience is a prime example of the varying management commitment to gender at an operational level.

Lessons and good practices often emerge at the micro level, and thus have insufficient weight to drive fundamental change. Furthermore, most activities that have been identified as “good practices” or “lessons” are somewhat hypothetical (e.g., accountability and incentives are needed, yet in practice, there are no comprehensive systems from which to learn and draw real lessons. Many evaluations have pointed out what has not worked, and then assumed that an alternative approach would be more effective. However, there is little evidence that these alternatives have actually been implemented, and still less of any results. Furthermore, most evaluations have noted that there is minimal demand from country-level partners to engage in gender mainstreaming, so the efforts of international agencies are, in any case, largely lost in terms of national development.

These evaluation findings lead us to ask, what can be tried next? The simplest solution would be to draw on the common operational practice of simplifying GAD to a women-centered or women’s empowerment approach—what might be called **WID Plus**. This approach would build on those elements of WID that did deliver results, but with the proviso that they should incorporate more fundamental analysis of gender power structures. Such interventions could deliver direct benefits as well as raise issues of gender equality in development more systematically. In particular circumstances, the focus of such activities could be on males; for example, male under-achievement in education. The main change from gender mainstreaming would be the return to concentration on interventions, which could deliver early benefits to women (and men where appropriate), with the expectation of deeper social change over a longer time frame.

A second, rather different option might be called **gender focusing**—i.e., focusing on those areas where gender equality appears to be sufficiently embedded and has made some progress. This approach would also replicate some of the achievements of the WID era, by initially focusing on health and education through project or SWAp-based interventions. A record of positive results has made interventions in these sectors less problematic to partner governments. Sectors then could be added, at different times in different countries—most likely (a) microfinance, which is often seen as an area of women’s empowerment and economic participation; and (b) labor market and investment policy reform, with involvement from the private sector. The latter may find some government support, even in relatively resistant countries, as part of policy-based lending designed to increase international market competitiveness and economic development.

Building on the labor market area, a gender focus could also be applied to broader issues, such as the role of women in private sector development to increase competitiveness. The emphasis on private business would avoid the appearance of imposing external social and political concepts that do not match national priorities. In the current economic climate and with the emphasis on globalization and outsourcing, interventions supporting the business environment may be preferred to prescriptions on government policies and programs. A business approach would also link corporate performance with social sustainability and equality—although there are also barriers to improving gender equality in the corporate world.¹⁹⁰

Enhanced M&E will be central to improving results and learning within organizations, within the context of the options outlined above. Gender monitoring and evaluation would be targeted in sectors where gender equality and women’s empowerment are the focus. Enhanced efforts could also be made to integrate gender more broadly across all evaluative activities, to identify unintended results, enhance cross-sectoral learning, and reduce blindness.

¹⁹⁰ See Bain (2010); McKinsey (2007; 2010).

Annex 1. Evaluation Studies Included in the Synthesis

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