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Successful strategies for addressing gender equality issues in programs and projects: What works?

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Introduction

How can we increase the likelihood of women benefiting equally from donor-funded development programs and projects? What lessons can we learn from development initiatives where some progress has been made towards equality between women and men? In other words, what strategies have worked in practice in the field?

Do we know what works?

The recent *Review on Gender and Evaluation: Final Report to DAC Working Party on Evaluation* (Hunt and Brouwers 2003, hereafter referred to as 'the review') provides evidence of change strategies that have actually worked in the field. The review assessed 85 evaluations undertaken by bilateral and multilateral donors from 1999 to 2002. Half were thematic evaluations designed to evaluate gender equality, mainstreaming and women's empowerment efforts, and half were general program or project evaluations, which included some gender analysis. The database for the review represents the highest quality and quantity of gender analysis in evaluations from 19 agencies. There was significant consensus among evaluators about the strategies that have helped us to address gender equality issues in programs and projects, regardless of the type of development assistance, the donor agency, the partner country or the program/project sector.

Build partnerships on equality for women through dialogue

Building partnerships on gender equality is an important principle for success. What this means in practice is that development workers need to talk to their partners about how equality of benefits for women is necessary and relevant to the work that they plan to do together. This type of dialogue and negotiation on gender equality needs to occur at policy level, during the development of country assistance strategies, and during program/project design and implementation. Fundamental success factors are:

- *Develop a shared vision and explicit consensus on gender equality objectives for the country strategy or development activity.* Of course, these objectives are far more likely to be owned by the partner agency if they are transparently relevant to the policies and commitments that the partner has already made on equality for women. One challenge here is for development workers to articulate, in a very concrete manner, how women's needs, benefits and rights are relevant to the development activities being planned and implemented, taking into account the social, economic and political context. The ideal outcome from such a dialogue is agreement on investments and activities, with a clear understanding of how benefits for both women and men will be realised.
- *Involve stakeholders from civil society in dialogue on development objectives and activities.* National machineries for women, local women's organisations, NGOs

and other local advocates for gender equality can play a key advocacy role in setting the directions for country strategies and in the design of development activities, if they have a place at the table. Ownership of development interventions and sustainability of outcomes may also be enhanced. Civil society organisations can play an important role in holding partner institutions accountable to close gaps between policy commitments and practice.

- *Make long-term commitments to development activities.* This is essential for making sustainable progress towards gender equality, and is also important for building the trust upon which partnerships are based.

Like those of other donors, AusAID's gender and development policy recognises the importance of high-level consultation in ensuring that partner countries are aware of the policy and that the priorities and commitments of partners are considered in programming to address gender inequalities (AusAID 1997:11). However, the need for the same type of dialogue to occur during program/project design and throughout implementation has not been acknowledged. Similarly, most Australian NGOs now have gender policies, but it remains relatively uncommon for those policies to be translated into local languages, or discussed in any detail with partners during program/project design and implementation.

Knowing and understanding your partner and their context is a prerequisite for effective dialogue and for the development of shared objectives for program/project interventions. Nevertheless, assessing and building partner capacity and commitment for gender-responsive programming remains one of the weakest links in our efforts to ensure that women participate and benefit from development activities. (Most evaluation reports did not identify partner capacity building for gender sensitive planning or implementation as a successful strategy. This may be because assessment of partner capacity remains rare, along with efforts to build partner capacity for gender sensitive development work).

Successful strategies for design, implementation and monitoring

Attention to gender equality issues in program and project design and implementation is essential if agencies want to increase the likelihood that both women and men will participate and benefit, and to ensure that neither is disadvantaged by development activities. This statement may seem blindingly obvious or trite. Nevertheless, lack of participation by women in design, poor needs analysis, lack of baseline data on key gender differences germane to the specific program/project, and a failure to address gender issues in program/project objectives and monitoring are most commonly cited as major obstacles to women participating and benefiting from development activities. Even limited attention can make a significant difference to whether women participate or benefit. Successful strategies most frequently noted in evaluation reports are:

- *Include gender equality objectives in overall program/project objectives* wherever possible. This is noted as a key reason for success when evaluators find positive benefits and impacts for women. This does *not* mean that development activities need to focus exclusively on achieving equality between women and men, or that women-specific activities are the only way to make progress towards equality. It means that there is a greater likelihood of both women's and men's needs, participation and benefits being considered if they are *explicitly* reflected at some level in program/project objectives. For example, the Sida (Swedish International Development Cooperation Agency) review of gender

mainstreaming found that projects with the most explicit gender equality objectives also had the most positive impacts on gender equality (Mikkelsen 2002:viii). My own experience strongly supports this finding: many design documents now include some gender analysis, but unless this is reflected in the design in a concrete way (such as in the logical framework matrix), it is less likely that gender equality issues will be given systematic or serious attention during implementation.

- *Use participatory strategies to involve both women and men in design and implementation.* Having adequate time and resources for participatory fieldwork is essential. However, participatory strategies by themselves do not guarantee that gender equality will be adequately understood or addressed, since participatory methods still often overlook women (Guijt and Shah 1998).
- *Ensure that gender strategies are practical, and based on quality gender analysis.* One finding from the review is that even where gender analysis is undertaken during design, it is often of a general nature, not linked to the activities to be implemented, to the expected results, or to overall social, poverty or sustainability analysis. This increases the likelihood that women will be marginalised during implementation. A number of evaluations note that an explicit gender strategy is critical, but most qualify this by saying that the strategy must be high quality and practical. This means that gender strategies need to identify, in very concrete terms, how gender equality is relevant in each program/project and context, and what this actually means in practice: what activities are needed, with whom and why; what results are expected; how these activities and results will contribute to achieving program/project objectives; how the strategy will be resourced; and how the strategy and its results will be monitored. The author's experience also suggests that 'stand-alone' gender strategies generally have little impact. To be implemented, key elements of the strategy need to be integrated into day-to-day project implementation and management tools and processes, such as in the logframe, budget, annual work plans, project monitoring and progress reporting.
- *Include explicit responsibilities for implementing gender equality objectives and strategies into job descriptions, scope of services documents and terms of reference for all personnel through every stage of the program/project cycle.* It may seem ridiculously obvious to note that development workers need to be told (through their job descriptions) that they have a responsibility to implement gender policies. Nevertheless, this is not yet routine practice, and evaluators found that it significantly increases the likelihood that gender equality issues will be seriously addressed. The challenge here is to ensure that statements about responsibilities are specific, meaningful and relevant to the program/project in question, rather than a resort to vague or general references to policy. One key to success noted by some evaluation reports is having competent and committed staff and stakeholders in the field, who also have the time, resources and support to dedicate to this issue.

- *Provide in-country social and gender analysis expertise.* It is hardly surprising that this has also been a key success factor where there is some evidence of success in meeting women's needs or making progress towards gender equality. In addition to analytical skills, gender specialists need good strategic assessment and planning, communication, advocacy and negotiation skills to be effective change agents within their design and implementation teams. Experience suggests that progress is more likely to occur when gender specialists are effective resource people, motivators and facilitators who mentor and support their colleagues to address gender equality issues in their specialist areas of work (Hunt 2000:32–33).
- *Collect adequate and relevant sex-disaggregated baseline information, and use gender sensitive indicators and monitoring processes as a minimum standard for program/project design, implementation, monitoring and evaluation.* Sex-disaggregated information is needed on who participates and benefits, what prevents males and females from participating and benefiting, unintended or harmful effects of programs/projects, and changes in gender relations. Unfortunately, many development activities still lack relevant sex-disaggregated baseline data and gender-sensitive indicators. These are serious constraints to assessing possible differences in participation, benefits and impacts between males and females. Where sex-disaggregated information is collected, it tends to focus on inputs and activities (such as the attendance of women or men at training, the number of women in groups set up or supported by the project, or the number of loans provided), rather than on benefits or longer-term impacts (such as learning outcomes from training, the benefits to livelihood or changes in gender relations from participation in groups, or whether women control or benefit from loans). Unintended impacts on women, or any other social group, such as men, women or children living in poverty, minorities or disadvantaged groups, were seldom investigated in the evaluation reports included in the review.

Effective approaches for making progress towards gender equality

The *Review on Gender and Evaluation* found evidence that the strategies listed above increase the likelihood of women participating and benefiting, and decrease the likelihood of women being disadvantaged from development activities. However, attention to gender issues in design and implementation is a necessary but insufficient condition to ensure that benefits are in fact achieved and sustained. Moreover, ensuring that women gain some benefits from development programs and projects is not necessarily the same as making real progress towards equality. This requires particular types of benefits, in addition to sustainability of benefits, which in turn depends greatly on local context, and the capacity of partner agencies and communities to sustain positive outcomes.

For example, a subset of evaluations (macro-level policy, sectoral and program studies) concluded that the local cultural, institutional and policy context of interventions is a more important determinant of whether women benefit, and whether benefits will be sustained, than any specific actions to address gender issues during design or implementation. The World Bank found that this also works in reverse: women were able to benefit from largely gender-blind World Bank assistance in Poland and Vietnam where implementing agencies stepped in with targeting mechanisms, or where both women

and men were able to access benefits because of other factors in the local social and institutional environment (World Bank 2002:14–16).

It is still rare for evaluations to acknowledge that men also have a role to play in changing gender relations. Where evaluations have found evidence of progress towards gender equality, a combination of approaches are identified as being keys to success:

- use of participatory approaches which strengthen women's leadership capacity;
- support for women's organisations as agents of civil society; and
- targeting of women to ensure that they have access to key project resources.

Using female staff, extension agents and women's groups facilitates women's participation, and helps to ensure that they have access to program/project resources. While this may seem self-evident, effective targeting strategies (including analysis of the constraints which prevent women from accessing resources and benefits), are not yet routine. The content of targeted programs is as important as the strategy of targeting. The provision of leadership training is a key feature in some successful programs. In others, providing women with skills training has had an empowering impact on women's decision making capacity, particularly when combined with participatory planning and monitoring processes, or group formation strategies which enable women to either work together or gain support from each other. Supporting women's organisations as agents of civil society enhances progress towards sustainable changes in gender relations, particularly where women's group identity and organisational capacity is strengthened, and where support is provided for women's advocacy activities with men and local institutions. Activities which have been specifically designed to empower women and promote gender equality, by strengthening local women's organisations to pursue their own agenda for equality, show the strongest evidence of strategic changes in gender relations. Some programs demonstrate increased participation in decision making by women, either at household, community or local government level. These are very positive examples; sadly, many of these activities remain small-scale.

The obstacles

None of the approaches listed above is a 'magic bullet'. However, they are core requirements if we wish to increase the likelihood of females participating and benefiting from development activities, along with males. More to the point, none of these approaches is new: most fall into the category of 'lessons learned', which we have failed to apply consistently to development cooperation efforts. The evidence from the review is overwhelming: systematic attention to gender equality issues in program/project design, implementation and monitoring is still rare.

Why is progress towards gender mainstreaming and programming for women's rights so slow in donor organisations? Lack of accountability to gender equality policy continues to be a serious obstacle to ensuring that both women and men benefit from development activities in all types of donor organisations (bilateral and multilateral agencies and NGOs). Evaluations highlight the problem of crowded policy agendas, which results in a failure to prioritise gender equality objectives in country strategies and in program/project design and implementation. Many agencies do not provide adequate guidance on how to operationalise gender equality policy. Policy commitments are not sufficiently embedded into agency procedures, management tools and systems, which results in a failure to monitor policy implementation sufficiently at any level. Many agencies are reluctant to utilise mandatory systems, or do not utilise them to their full

effect, and there are few incentives for good performance on gender equality (Hunt 2000:15–17). Confusion about gender equality concepts and objectives remains widespread: the word ‘gender’ is still frequently used as a synonym for ‘women’, or is used without qualification (rather than being used meaningfully in relation to equality, relationships, roles or responsibilities). Links are rarely made at any level (policy, country assistance strategies, program/project interventions) between poverty reduction and gender equality objectives.

Overall there is a sense that momentum has been lost since the Fourth World Conference on Women in Beijing in 1995. For example, while the history of progress on this issue within AusAID is largely one of individual effort from below, there were a few years (centred around the Beijing conference) when the implementation of gender policy was more likely to be seen as mandatory. However, in recent years, major policy initiatives such as the 2001 Strategic Plan, the 2002 Ministerial Statement to Parliament, and policies on governance, water, and humanitarian programming have given little or no attention to gender equality policy or issues (AusAID 2001a, AusAID 2002a, AusAID 2000, AusAID 2003, AusAID 2001b). While AusAID’s policy on poverty reduction (AusAID 2001c) makes a number of references to women, the links between gender inequality and poverty reduction are poorly articulated.

Despite the obstacles, there are many positive examples of development activities which have made serious efforts to involve and benefit both females and males, and donor staff who are highly committed to finding and nurturing space within development programs to benefit women and make progress towards gender equality and human rights. This is certainly the case in Australia in AusAID, NGOs and contracting companies.

Conclusion: A strategic approach to gender mainstreaming

While we now have a strong basis in evidence regarding approaches needed through the program/project cycle, this does not mean that these approaches are easy to apply in the field, or that changes in gender relations will automatically follow. Making progress towards equality for women is complex, with a variety of economic, social and cultural obstacles. As a result, change is bound to be incremental and impact will be demonstrated in the medium to long-term only if benefits are sustained. Moreover, the role that development cooperation can play in changing gender relations needs careful reflection, collaboration with partners, and future investigation through well-designed research and evaluation.

Does gender mainstreaming lead to improvements in women’s lives? The question cannot be answered: we simply do not have enough examples of authentic gender mainstreaming, on any scale, to present evidence in favour or against the proposition. What about activities which have been specifically designed to promote gender equality? Here we are on somewhat firmer ground, although existing evidence is based mostly on small-scale interventions and sustainability is closely linked to an enabling social, institutional and economic context.

Where should gender specialists and advocates focus their energies now? Charlotte Bunch’s (2003) suggestion seems the best way forward. We need to take a strategic approach by focusing on areas where we can actually make a difference. For me, a strategic approach to gender mainstreaming means:

- Focus more on supporting activities designed and owned by female and male advocates for human rights and gender equality in partner countries. This builds

- an enabling political and social environment for progress and sustainability at the micro-level in individual development activities, as well as at the macro-level.
- Scale-up or replicate activities and strategies that have demonstrated equality of participation and benefits, and sustainable progress towards equality and human rights for women.
 - Continue efforts to improve design and implementation, by applying the proven strategies noted above, and by using gender-sensitive indicators as a minimum standard for design and implementation. It is essential for governance activities to address gender inequalities.
 - Strengthen internal accountability within donor agencies. Progress to date owes so much to the commitment of donor staff and contractors who nurture human rights approaches and who support programs which advance the status of women. Commitment from below will be critical to sustain progress already made within donor agencies.
 - External accountability needs to be strengthened. In donor countries, this requires donor NGOs to ensure that their houses in order, so that they can be credible advocates for gender equality. In partner countries, this takes us full circle again to the first point above: support activities undertaken by local women and men who are advocates and activists for women's human rights.

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