Handbook on mainstreaming gender equality into the OAS project cycle

Organization of American States

"The elimination of all forms of discrimination, especially gender, ethnic and racial discrimination, as well as diverse forms of intolerance, the promotion and protection of human rights of indigenous peoples and migrants, and respect for ethnic, cultural and religious diversity in the Americas contribute to strengthening democracy and citizen participation."

(OAS Inter-American Democratic Charter, September 11, 2001).

Modules

Introduction

This Handbook grew out of the efforts of the OAS Department of Planning and Evaluation to introduce a gender and rights approach into international mandates on gender equality and human rights, as part of a process of modernizing the management of the institution and incorporating a results-based management system. In principle, the Handbook is addressed mainly to those who design, manage, monitor and/or evaluate projects in the OAS, but is not confined to the Organization's staff. It is a training initiative, in the form of a handbook that provides practical tools for addressing gender issues at each stage of the project cycle. It summarizes and organizes a number of tools that are often used in gender-sensitive planning and evaluation, with up-dated content referencing the specific areas in which the OAS operates.

This Handbook consists of ten thematic Modules, organized according to the different phases of the planning and evaluation cycle, so that each guide can be used independently of the others: (1) Conceptual framework; (2) International mandates and instruments of the Inter-American System; (3) Evaluability of gender-sensitive project profiles; (4) A gender equality approach to stakeholder analysis; (5) Gender assessments; (6) Identification of gender equality-based objectives and alternatives; (7) Sources of information on gender matters; (8) Gender indicators; (9) Checking whether a logical framework is gender-sensitive; (10) Gender-sensitive monitoring and evaluation.

Each Module summarizes the conceptual, methodological and operational issues, and provides checklists, examples, glossaries of terms, bibliographies and supporting materials that will help examine a specific topic in more depth. It represents a major effort to compile, systematize and adapt gender materials, and seeks to stimulate further study by those who wish to include a gender equality perspective into their projects for change.

We thank Elizabeth Guerrero and Soledad Quiroz, consultants on Inclusion and Equity, for their valuable contributions, and their critical and constructive approach. Special thanks are also due to Carmen Moreno, Executive Secretary of the Inter-American Commission of Women

(CIM); to her team, Belkis Mones, Hilary Anderson and María Celina Conte, for their cooperation, and to the team from the OAS Department of Planning and Evaluation for their openness to learning and to taking a fresh look at what they do, particularly Yacsire Cutler, Denise Goolsarran, Mariana Herrera, Carla Sorani, Alejandro Cruz, Paola Cárdenas, and Lili Romero, and to the Department Head, Ricardo Graziano, for his commitment and vision.

We are convinced that incorporating a gender focus is not simply a technical exercise. It is also political, because achieving gender equality means redistributing resources and power, negotiating interests and change processes that imply changing attitudes and day-to-day organizational behaviors by men, women and institutions in our societies.

This Handbook deals with the technical aspects of gender-sensitive planning, monitoring and evaluation; however, behind it lies the idea of a transformation of relations between men and women, so that they can both fully exercise their rights in societies that are increasingly more just and more equitable.

Module 1
Conceptual framework

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1. Equality over time

Equality is a central feature of democratic societies[1]. The principle of equality holds that all persons have the same rights, regardless of race, gender/sex, religion, social position, ideology or any other characteristic inherent in individuals, their cultures and their beliefs. This principle has allowed women progressively to claim rights similar to those of men.

Over time, this principle has taken on content and significance, as it became apparent that different population groups were excluded from recognition and exercise of the rights that States sought to guarantee. People with fewer resources --children and women, to name but some—were among those to whom the principle of equality did not apply in the initial stages of definition and formal acceptance. It therefore became necessary to expand and recognize the rights of these groups (to this end, instruments such as the Declaration of the Rights of the Child, and conventions on women's rights were adopted)[2].

This failure to put the principle of equality into practice made it necessary to address specifically equality between men and women – or gender equality--, understood as a "situation in which women and men have the same rights and opportunities, *de jure* y *de facto,* and take part equally in all spheres of public and private life, with freedom to develop their capacities and to take decisions"[3].

The principle of gender equality seeks to ensure that the differences between men and women do not turn into inequalities. Thus, it postulates that the same value and rights are accorded to all persons, who would be neither superior nor inferior to each other. It does not mean that men and women have to become the same, but rather that their rights, responsibilities and opportunities will not depend on the fact of having been born male or female[4].

Gender equality means that women and men have equality of conditions and opportunities to exercise all of their human rights, to use their potential to contribute to political, economic, social and cultural development, and to realize the benefits of its results. It means that society therefore places equal value on the similarities and differences among women and men, and on their changing roles.

Gender equality means that consideration has been given to the specific behaviors, aspirations and needs of women and men, and that they have been given the same value and attention.

Achieving gender equality means that equality should be not only formal, but also real.

- *Formal equality* (d*e jure*) means legal or regulatory prohibitions on discrimination against anyone for reasons of any characteristic or trait (in this case, sex). Formal

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[1] For more information on the topic of gender equality, see Paloma Durán (2005).

[2] Hanna Arendt talks of the idea of a primordial right: "the right to have rights", which gives historical and social meaning to the achievement of rights.

[3] European Union. Glossary , Mainstreaming and gender equality policies in Europe". Available at: http://www.ucm.es/info/mageeq/glosario.htm (Spanish only).

[4] ILO. (2000). ABC of Women Workers' Rights and Gender Equality, Geneva: ILO.

- *Real or substantive equality (de facto)* requires that measures be taken to ensure that equality is effective or real, removing cultural and other obstacles that might stand in the way of achieving that equality.
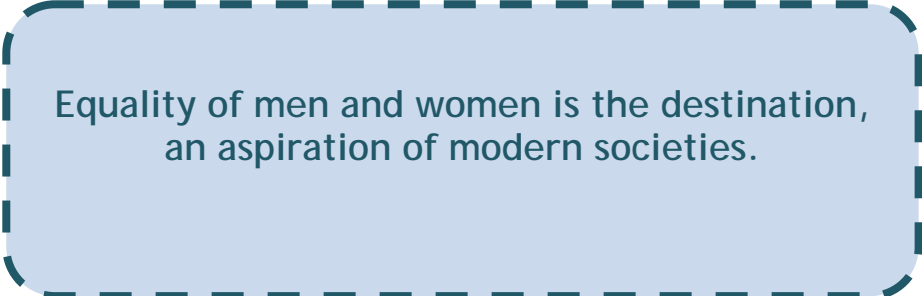
The concept of gender equality has evolved and has been advanced over time, thanks to the contributions of women's movements, recommendations of international instruments, and measures that have been taken to eliminate all forms of discrimination against women.

We therefore speak of equality of opportunities, equality of treatment, and equality of results or outcomes, each of which addresses different dimensions of equality.

Equality of opportunities presupposes that all members of a society start at the same point and have the same possibilities of participating in the various spheres of society. It therefore means compensating for initial disadvantages.

Equality of treatment means treating all people in the same way, independently of their sex, race, age, religion, etc. It stresses in a positive way the principle of equality and non-discrimination in terms of access to services, resources and exercise of rights.

Equality of outcomes means that all persons have the same ending point in each area or field of undertaking and that they obtain the same benefits from their actions.

> Equality of men and women is the destination,
> an aspiration of modern societies.

2. The OAS pillars and equality of men and women

The OAS has four pillars that are the basis for achieving its purposes: Democracy; Human Rights; Security, and Development. Equality of men and women runs through each of these pillars in a crosscutting way, since none of these goals can be achieved unless the inequalities and inequities between men and women that are present in today's societies are taken into account.

Democracy

Strengthening democratic processes and expanding citizenship[5] means that men and women must participate and that their interests must be represented. Women's opportunities to participate in politics and in public life must therefore be assured and expanded, since historically, women have been under-represented in this field, and have encountered greater structural problems in participating in politics and in influencing decision-making at different levels. Traditionally, the ways in which politics have operated have been more suited to the interests and needs of men and have restricted or limited the participation of women[6].

Assuring full political citizenship and strengthening democratic governance requires supporting equal representation of women in the legislative, executive and judicial branches, as well as in political parties, electoral bodies and other major bodies (CIM, 2010).

Human Rights

All persons have the right to exercise their human rights and to have those rights protected by the laws and customs of their country of residence. However, women often do not exercise their rights, either because they do not know them, or because national laws or cultural practices in their countries may hold them back. Historically, the exercise of human rights has not been equal because understanding of how they could or should protect women continues to be limited, and it is often not recognized that the fact of being a women is an additional risk factor in violations of some human rights.

At the same time, it is very important that women's rights be promoted and protected by means of economic, social and cultural policies, both in the work of the OAS and in the member states (CIM, 2010).

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[5] See definition of citizenship in the Glossary of this Module.
[6] The Gender Empowerment Measure (GEM), a measurement taken each year by UNDP, has shown how the gaps are being reduced in indicators related to women's condition, or practical needs, but have at the same time, stagnated or changed little, or more slowly, with regard to women's position vis-à-vis men in places of power and decision-making.

Security

The OAS views security from a multidimensional perspective, and makes reference to the protection of all persons[7]. From this standpoint, equality of men and women may be seen in the different 'threats' (whether old, new, public or private) mentioned in the Declaration on Security in the Americas; these threats have particular implications or connotations for each sex, given the prevailing gender order, which must be understood in order to take action on them[8]. Thus, terrorism, extreme poverty, lack of public security, domestic violence, trafficking in persons, and so forth do not affect men and women in the same way, and therefore, a gender approach is required.

A gender perspective, in a broad sense, must be part of the debate on the hemispheric security agenda, particularly since violence against women is of great importance for the lives of millions of women in the Americas. The need to include civil society organizations in monitoring and overseeing the security sector from a gender perspective (CIM, 2010) is also important.

United Nations Security Council resolutions 1325 of 2000, 1820 of 2008 and 1889 of 2009 on including women in decision-making on peace and humanitarian actions should also be borne in mind.

Development

The debate over the concept of development has come a long way since the initial economic-focused ideas of the sixties. Nowadays,capacity building and what is termed human development are stressed. From this perspective, action to promote and assist national development should be geared to greater empowerment of both men and women, building the capacities of both, and developing greater participation in decision-making. This in turn means transforming the way society is organized and allocates resources (both material and intangible), but also, and particularly, changing the way that social actors – men and women—define themselves, relate to others, and access the use of resources.

One of the principal issues to be considered here is related to economic rights, participation in the labor market, both formal and informal, and the increasing attention paid to the economy of care-giving in modern societies (CIM, 2010).

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[7] The OAS concept of security can be found in the 2003 Declaration on Security in the Americas. Accessed at http://www.oas.org/en/sms/docs/DECLARATION%20SECURITY%20AMERICAS%20REV%201%20-%2028%20OCT%202003%20CE00339.pdf

[8] It is also important to note that often, "...both public debates on lack of security in the city, and actions and public policies geared to responding to that lack of security are based on indicators thatcircumscribe violence to the types of crimes that generally do not include violence against women." (Rainero, 2006).
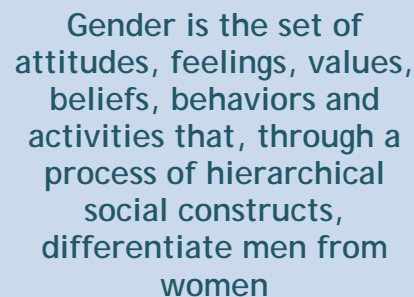
3. How do we move forward towards gender equality?

"… the findings in the evaluations all point in the same direction. Work on institutionalizing the empowerment of women and gender equality have had low priority, there have been insufficient resources to implement policies and strategies, the focus has shifted to other areas […] The mainstreaming strategy has been unsuccessful."

Norwegian Agency for Development Cooperation, Lessons from Evaluations of Gender Equality in Development Cooperation. 2006.

Achieving equality among men and women requires a qualitative, substantive leap forward, in order to understand and use a *gender equality perspective*. This means taking into consideration and paying attention to the differences between men and women in any policy, program and project activity or area: this new strategy has been described as gender mainstreaming.

What is Gender?

The concept of gender has changed over time, and now has a number of different nuances. It is understood as the characteristics that society attributes to the sexual difference between men and women. These characteristics are social and cultural constructs that make up a system of power relationships and that assign the performance of certain functions in society to one or the other sex; these functions are given different value and are socially and economically rewarded differently, and are therefore expressed in terms of hierarchy.

> Gender is the set of attitudes, feelings, values, beliefs, behaviors and activities that, through a process of hierarchical social constructs, differentiate men from women

It is important to stress the distinction between gender and women, since they are often understood as being synonymous. It may be felt that in order to incorporate a gender approach, it is sufficient to mention women, or to include women as project beneficiaries, without questioning the socially constructed relationships, roles and stereotypes. Taking a gender approach necessarily means analyzing the bases of the inequities between men and women (not forgetting that in some areas of life, asymmetries are unfavorable to men), and taking action to change them.

IN SUMMARY:

- Gender is not synonymous with women; it is both masculine and feminine.
- It is a concept of day-to-day relations, in both the public and private spheres, where men and women interact according to social norms and expectations.
- It is hierarchical; it is an expression of power relationships.
- It is affected by other relationships --religious, ethnic, social, economic and others.
- It is a social and cultural construct; it changes over time.
- The distinction of gender roles affects different spheres of social and material life.
- It has layers of value associated with the differences. The result is a structurally asymmetrical access to resources, which in turn generates privileges and subordinations.
- It means recognizing that specific, differentiated gender identities and demands must be taken on board in development projects: there are both practical gender needs and strategic gender needs.
- In order to change gender discrimination or inequities, a perspective of change in gender relations is needed.

Caroline Moser, C. Levi in "Gender, Training and Planning" SUMBI 1988 Lima

A gender approach can be used in two ways in planning: (a) inclusion of specific gender actions and components to address specific situations (such as, for example, a training course for women, quotas by sex, medical care for women who suffer violence in armed conflict), and (b) by mainstreaming a gender perspective into the daily work of an institution as a whole (such as, for example, in its regular programming, budgets, evaluation systems, human resources policies, etc.)

What is gender mainstreaming?

Starting in 1995, the discussion of gender issues in public policies has become much more profound. The Fourth World Conference on Women held in Beijing (China) triggered a series of processes and initiatives that governments throughout most of the world were taking in order to pave the way for gender equality. The need and mandate arose to change the assessments, methodologies, policies and processes for planning, implementation and evaluation that governments had been using: "(all) actors should promote an active and visible policy of including a gender perspective in all policies and programs, and to that end, the effects on men and women should be examined before decisions are taken".[9]

Since that time, **mainstreaming gradually became an essential strategy for including a gender focus in public policies**.[10] However, while this strategy has had successes and failures over the years, it must be acknowledged that it represented a qualitative leap forward in the management and implementation of public policy, since it helped move gender issues from the sidelines where they had remained in earlier years.

We must also acknowledge that mainstreaming has enabled us to take a different approach to offsetting the impacts of gender inequality that are often produced by overall public policies, even by those policies geared to women themselves and their families if the policies do not have a gender perspective.

This gradual process of conceptual and methodological development grew over time, and today, interesting experiences can be found in various areas of endeavor of different government agencies, both in Latin America and elsewhere in the world.

Gender mainstreaming has been defined as emphasizing two perspectives that we consider complementary: the effect of policies on women and men, on the one hand, and an institution's policy process itself and the building of capacities needed to carry out those gender equality policies, on the other.

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[9] Platform for Action of the Fourth World Conference on Women, Beijing, 1995.

[10] Evaluations that have been conducted of mainstreaming have shown that there are still difficulties in implementing it: "It has not achieved its ambitious goal of completely permeating organizations and what they do". Berger, 2004; Rao, 2005; Moser, 2005; Rao and Kelleber, 2005; Murhopadhyay, 2006, cited in Navarro, Natalia (2007). Gender inequalities in organizations: organizational change towards equity. UNDP. El Salvador.

Diagram 1
Different forms of addressing gender issues at the macro level
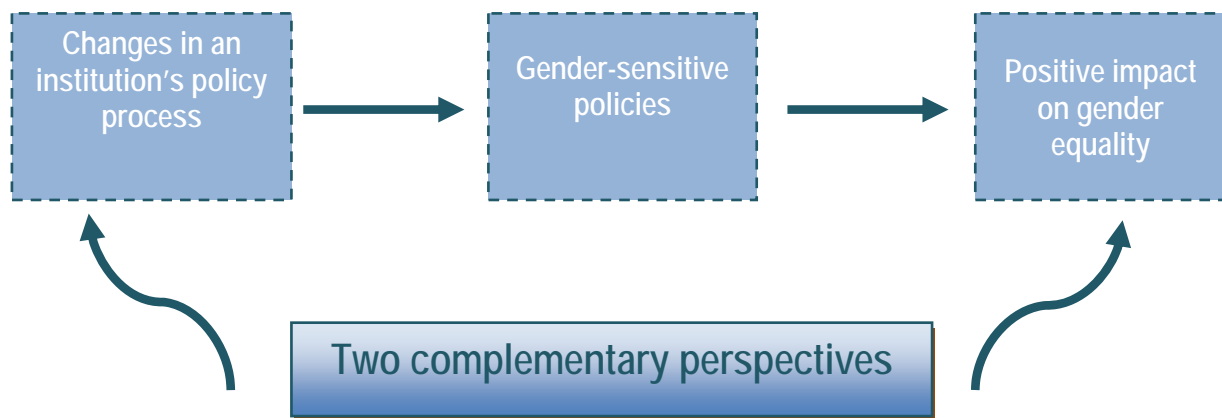
Source: Gender and policies on social cohesion. Mainstreaming ideas and experiences.
International and Ibero-American Foundation on Public Administration and Policies (FIIAPP) –
EUROSOCIAL. (2007)

In short, *gender mainstreaming* may be defined as: "… the process of assessing the implications for women and men of any planned action, including legislation, policies or programs, in any area and at all levels. It is a strategy for making women's and men's concerns and experiences an integral part of the design, implementation, monitoring and evaluation of policies and programs 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."[11]

> The goal of specific actions on behalf of women, and of gender mainstreaming is to achieve equality between men and women

Mainstreaming is the inclusion of gender in the mainstream of public policies, and is considered as a strategy for ensuring that the interests, concerns and experiences of women and of men form an integral part of the design, implementation, monitoring and evaluation of programs and projects in all political, economic and social spheres, such that the inequality between men and women is not continued nor perpetuated.

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[11] Definition of the United Nations Economic and Social Council (ECOSOC), 1997, document E/1997/L.30.

If we want to incorporate a gender perspective into project management, we should consider:

- Fully accepting that women in all societies are in a position that is subordinate to men, and that this translates into disadvantages in access to and enjoyment of the opportunities and benefits of development, as well as the existence of discriminatory practices of various types. This does not mean ignoring the fact that in some areas, it is men who are in a disadvantaged position.

- A growing awareness on the part of most governments and societies that the subordination of women and discrimination against them is a matter of public interest.

- Government authorities have the obligation to take action to assure gender equality; this obligation finds support in international human rights accords with which governments are obliged to comply.

- Full and authentic development and democracy cannot exist as long as inequality and discrimination on account of gender or any other reason persist. Therefore, all development policies should be formulated, approved and executed from a perspective that will assure equality and the elimination of all forms of discrimination based on sex.

4. What does gender and rights mainstreaming mean for the work of the OAS?

Mainstreaming these approaches has a number of implications for an organization[12]. In the case of the OAS, these implications are, at a minimum, the following:

a) Develop and use a concept of equality of men and women that is not merely formal equality, but also substantive equality.

b) Include a gender approach in all OAS policies, plans and programs, particularly those that are key for the Organization. This means that a gender approach cannot be limited to projects or actions that are of lesser interest to the Organization. The same is true of a human rights approach.

c) Promote the inclusion and participation of women in all actions undertaken, and in decision-making processes.

d) Include all of the Organization's actors (staff at different levels and from different units and sectors) in the gender mainstreaming process, since it is the staff of the Organization as a whole who will be called on to promote gender equality actions.

e) Change the Organization's institutional culture, since gender equality and rights-based mainstreaming means coordinating work among the different parts of the Organization.

Thus, gender mainstreaming requires the OAS to work not only "on the outside" but also inside the Organization, as has been stated in several General Assembly resolutions and in the **Inter-American Program on the Promotion of Women's Human Rights and Gender Equity and Equality (PIA)**[13]: *"2.1.3. Adopt, in coordination with the CIM, the measures needed to integrate the gender perspective into the execution of programs and activities by all organs, agencies, and entities of the OAS, and promote the incorporation of this perspective into the work of the agencies of the inter-American system."*

Incorporating a gender perspective *inside the Organization* requires at least the following:
- Building capacities, developing leadership on the subject, and reviewing the Organization's procedures and practices, among other measures, to support the OAS's effort to help the countries in this area.

- Reviewing programs and projects, from design to evaluation, as well as budgets and monitoring systems. This Handbook is intended to help this effort.
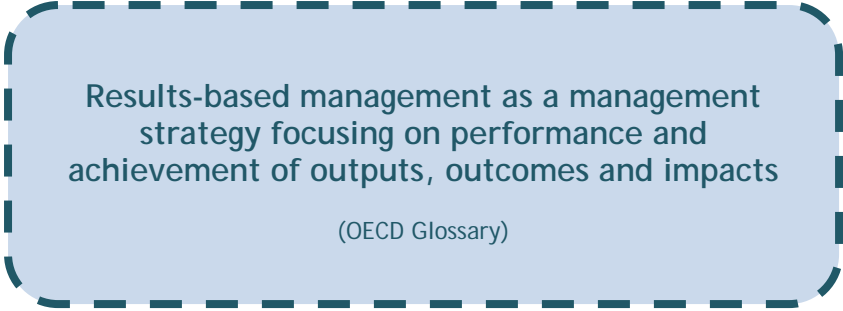
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[12] See, for example, the thoughts of Emanuela Lombardo "Gender mainstreaming in the European Union". Equalitas. Legal Review of Equality of Opportunities for Women and Men, vol. 10-15, May-December 2003, pp. 6-11.

[13] AG/RES.1732 (XXX-O/00), Adoption and implementation of the Inter-American Program on the promotion of women's human rights and gender equity and equality.

4.1. The new paradigm of Results-Based Management (RBM)

Results-Based Management came about as a response to the need to improve effectiveness and efficiency in the use of public resources, and is part of the new public administration paradigm. RBM is a means of improving management's accountability and efficacy, and of having the principal actors participate in defining expected results, assessing risk, monitoring progress, and incorporating lessons learned into future management decisions.

> **Results-based management as a management strategy focusing on performance and achievement of outputs, outcomes and impacts**
>
> (OECD Glossary)

By **result or outcome,** we understand change that can be described or measured and that stems from a cause-effect relationship. Outcomes may be initial or immediate (short-term), intermediate (medium-term), ultimate, or final (long-term).

Measuring this change is important and necessary, and therefore the proposed outcome must be realistic, must clearly identify who will be the beneficiaries of the change, and must be based on a good analysis of the situation. Appropriate indicators should also be considered to measure progress toward the expected results (for more details, see Module 8 on gender indicators).

A second key element is the existence of a **cause and effect relationship** as the logical basis for managing change. Thus, outcomes are those changes that are attributable to the influence that an organization has had using particular resources. From this standpoint, consideration should also be given to the context and to any risks that might endanger achievement of the expected outcomes.

RBM stresses achievement of short and medium term outcomes, although long-term outcomes are not discounted. RBM operates in a strategic framework, and is based on the general rule that a project is but one step in a long-term strategy backed up by a theory of change. In the area of gender, evidence on the status and position of women vis-à-vis the theory of gender is mixed, and this in itself is a theory of change in gender relations in society.

a. Results Chains (Logical Model)

The logical model establishes the causal sequence for a development intervention. It stipulates the sequence needed to achieve the desired objectives, beginning with inputs, moving through activities and outputs, and culminating in outcomes, impacts, and feedback. (OECD Glossary). The results chain describes the causal or logical relationships between inputs, activities, outputs, and the outcomes of a particular policy, program, project or initiative.

Diagram 2
Results chain of a project using a RBM approach
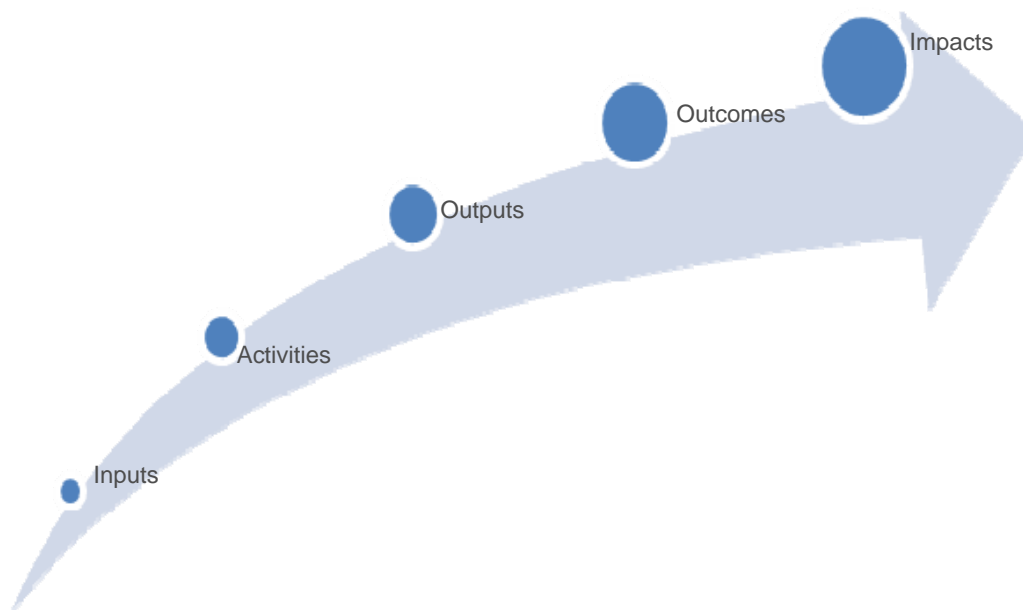
Inputs are the organizational, intellectual, human and material resources that are used to achieve particular results.

Activities are the actions undertaken or the work done to mobilize the inputs, such as funds, technical assistance or other types of resources to generate particular outputs.

Outputs are the goods, services, training, knowledge and information that the executing agency should produce and for which project inputs are provided (personnel, money, non-financial resources).

Outcomes: The anticipated outcomes are physical, financial, institutional, social, environmental or other outcomes to which a development intervention is expected to contribute.

Impacts (long-term) are the long-term impacts (3 to 5 years after the project has ended), both direct and indirect, positive and negative, that are generated by a development intervention, whether intentionally or not. They represent an overall change in living conditions, or in gender positions or relations among the beneficiary population.

It should be remembered that the fact of executing or completing an activity is not, in and of itself, a development impact. The results should always reflect the real changes in the level of development that are attributable to the executing agency. Each level of results is linked to the level above.

The project outcome should be framed realistically, in such a way that it is achievable within the constraints of time and available resources.

b. Risk management

As stated earlier, this strategy emphasizes the identification of risks. **Risk** is the possibility that a critical condition may impede achievement of the anticipated results. Risk management means considering the context and its impact on the cause-effect relationship of results.

These risks or assumptions must first be identified. In planning a program or project and defining the anticipated results, it is important to remember that the context changes constantly and may be unstable. External factors may often cause it to fail. The planning and concept stages should determine the conditions necessary for success. The assumptions describe the necessary conditions that must be in place if we want the cause-effect relationship among the different levels of results to function as expected.

c. Measuring performance in Results-Based Management (RBM)

This is the action of measuring and controlling the course of the project, and of monitoring key project activities. This measurement is taken by means of indicators. **Indicators** are the most standard instruments for measuring the results achieved through a project, whether in quantitative or qualitative terms. In selecting the indicators, consideration should be given, at the very least, to those indicators called SMART indicators.

Table 1
Description of SMART indicators[14]

Type of indicator	Description
Specific	Clearly states what is to be measured
Measurable	Can be monitored
Achievable	Realistic, neither too modest nor too ambitious
Relevant	Related to the objective to be achieved and the result to be measured
Time-bound	Expressed in terms of quantity, quality and time

Source: UNDP (2009). Handbook on Planning, Monitoring and Evaluating for Development Results. United Nations.

Means of verification should be specified for the indicators selected; these are the ways in which the indicators will be measured and the sources that will provide the information[15].

RBM puts more emphasis on indicators of outcomes than on process or input indicators. It is also important to note that the use of indicators presupposes that there is a **Baseline,** which is the reference point that enables us to measure change over time, the starting point against which an indicator is defined, with an initial value in order to measure progress. In gender issues, a number of country assessments were carried out in connection with the Fourth World Conference on Women in Beijing in 1995, which in some areas, are considered baselines on the status, condition and position of women. In the years since then, measurements have continued from this milestone.

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[14] For more details, see Module 8 on gender indicators.
[15] For more details on information in gender matters, see Module 7 on sources of information.

4.2. Planning and gender focus

Planning is a tool used for changing or transforming a particular problem or unsatisfactory situation and achieving the desired situation. The literature in general shows the planning cycle in the following simple chart:

Diagram 3
OAS project cycle
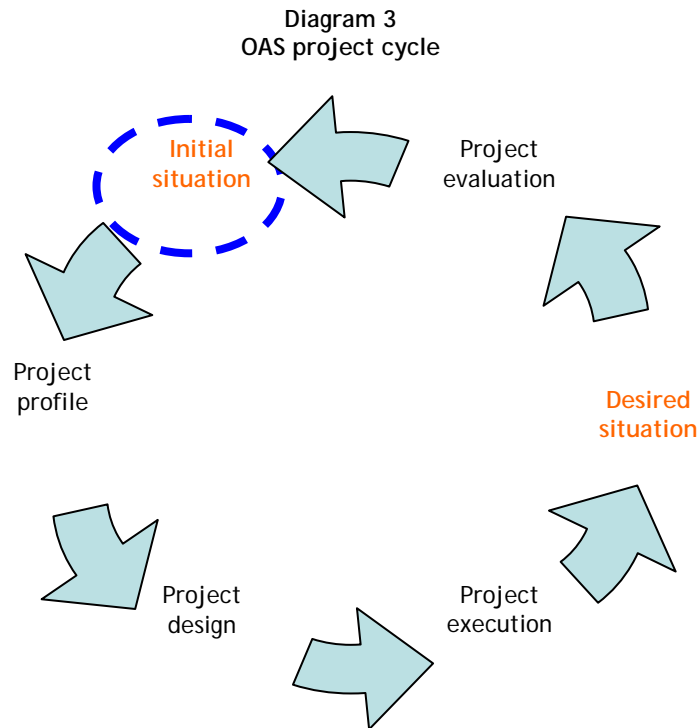
In order for the intervention to achieve the anticipated results, a *Gender analysis*[16] must be considered from the outset, because it is what helps identify differences in men's and women's participation in the home, in the economy and in society, as well as the structures and processes that contribute to an unequal distribution of opportunities for men and women. Gender analysis therefore contributes to an assessment of differences, and makes it possible to design alternatives and courses of action that include both sexes effectively in the project, not overburdening one or the other. It also helps our understanding of how the benefits of the actions taken affect both sexes and the various kinds of impacts on the people they reach.

Project-planning processes may represent risks for gender equality and may fail if they presuppose that at the outset, conditions and opportunities for women and men are equal. Sometimes, the way in which different cultures operate regarding what women and men can or cannot do is ignored; this may generate undesirable conflict if the situation at the beginning has not been sufficiently understood before the interventions are planned. Projects are definitely risky if they are not gender-sensitive. The principal risks here may be:

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[16] See details on gender analysis in Module 5 on gender-focused assessments.

a) Setting unequal requirements for access to project benefits and economic opportunities, including remunerated work, training, credit, scholarships, business opportunities, and others.

b) Not considering means of prior consultation about the project, nor effective or real participation in it of women and men. This may result in a culturally inappropriate intervention, and is particularly important in the case of projects involving indigenous peoples and/or peoples of African descent, given applicable international accords on these matters.

c) Ignoring women's right to inheritance and land ownership, housing and other goods or natural resources, given the particular way in which women are behind in these areas.

d) Introducing unpaid work in an unequal way --when projects require volunteer work or community contributions and do not offer the same possibilities or conditions for equitable participation by men and women in these specific activities.

e) Introducing restrictive, discriminatory conditions regarding pregnancy, maternity or paternity leave, or marital status on women's or men's participation in project activities and benefits.

f) Increasing the risk of violence, sexual exploitation, trafficking in persons and/or sexually transmitted diseases.

Planning that fails to consider a gender equality perspective, or that views gender as "neutral", starts from the presumption that the population is homogeneous and that policies and plans therefore affect men and women in the same way. It fails to recognize that both have different social and cultural determinants, have different roles and responsibilities, do not have the same resources, and have unequal positions of power. All of this means that they cannot participate in the same way in accessing the benefits of development in equal fashion. This supposed neutrality has traditionally been an obstacle to effective development planning.

> **The old planning paradigm using the "Women in Development" approach (WID) presupposes that women:**
>
> ▪ **Are passive receivers of development,**
>
> ▪ **Motherhood is a woman's most important role,**
>
> ▪ **Rearing and socializing children and caring for family members is the most effective role for women in all aspects of development.**

The current need to include a gender equality perspective in projects stems from the recognition that both women and men are actors in and subjects of development, and therefore should have access to development decisions, resources and benefits. As a result, projects should address the specific needs of men and women, and should propose responses that will assure equality for both genders. This is what has been called the **Gender in Development Approach**, which, unlike WID (Women in Development), seeks its own rationale for development and empowerment. It proposes rethinking public policies, from formulation through execution and evaluation, as well as priorities for change, by analyzing not only women's life conditions[17], but also their position and changes in gender relations that reproduce and perpetuate inequality.

It is useful to bear in mind the areas for intervention set out in the proposed Strategic Plan[18] of the **Inter-American Commission of Women** (CIM), which assesses priority problems in gender equality in terms of its four program areas:

- **Women's full political citizenship for democracy and governance.**

- **Women's economic security and citizenship.**

- **Human rights of women and gender violence, and**

- **Multidimensional security from a gender perspective.**

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[17] We shall adopt Kate Young's understanding of the condition of women as meaning their current material status (poverty, lack of education or training, workload, lack of access to modern technology, work skills, etc. See her article "Reflections on addressing women's needs" (1991).

[18] CIM (2010). Strategic Plan 2011-2016 of the Inter-American Commission of Women (CIM). Washington D.C.

Glossary

CITIZENSHIP

Citizenship covers a set of rights and civil liberties that pertain to members of a national community: civil rights to freedom and equality; social rights to health, education, housing, sports and recreation; economic rights to work, property and productive resources; the right to a life free of violence; and political rights to freedom of thought, expression and organization, to elect and be elected, and to participate in decision-making on national development. All are human rights, which taken as a whole, define the condition of being a citizen. Women's full citizenship thus refers to legal capacity and true opportunities for exercising their political rights and enjoyment of the wellbeing and security that come with their fulfilling their civil, social, economic and human rights as full members of the community.

"Achieving full citizenship of women means advancing towards a development process that will break with discrimination related not only to specific gender demands but also to a just distribution of goods and services, social benefits, and natural resources, as well as recognition of and respect for cultural and ethnic diversity. Exercise of citizenship lies in large part on citizens' capacity to influence and take the decisions that will determine their possibility of having all their rights respected. In a historical context of inequalities among men and women, characterized by asymmetric power relationships that have favored men and subordinated women, enjoyment of these rights has been unequal".

GENDER EQUITY

By gender equity, we understand the impartial treatment of men and women, according to their respective needs; they may be treated equitably, or differently but still equitably. Gender equity refers to a fair and just distribution of resources, responsibilities, tasks, and so on, among women and men while respecting their differences. In the area of development, specific measures must often be taken to compensate for or mitigate the historical and social disadvantages that hold women back.

GENDER FOCUS

Is a way of looking at and understanding the world and relations in society, bearing in mind the unequal power relationships between genders, and making their different needs visible.

GENDER

A set of ideas, beliefs and attributions that are assigned to men and women by a society's culture and that determine the relationships between them. Gender is what a society attributes to each sex, that is, it refers to the social construct of being a man or a women, the inter-relationship

between the two, and the different power/subordination relations in which they occur. (OXFAM, 1997).

The sex-gender system is a set of practices, symbols, representations, norms and social values that societies construct on the basis of sexual differences (De Barbieri, 1992).

A component of relations based on sex differences, and a primary form of significant power relationships (Joan Scott, 1990).

GENDER EQUALITY

A situation in which there is equivalence in value and hierarchy between men's and women's possibilities, opportunities, rights, access to and control of resources. It is the recognition of all persons as rights-holders.

GENDER INEQUITIES

Unjust and avoidable situations that are gender-based. Inequalities among men and women as a function of the socio-cultural system, which translate into barriers, discrimination or limitations on one sector of the population's access, use, control and decision-making.

INSTITUTIONALIZING THE GENDER PERSPECTIVE

A process by which women's demands or claims for gender equality become part of the routine and norms of public institutions. This process means changing a country's body of laws, political agenda, values, public policies and budgets, institutional structures and workings of government, and also changing the approaches traditionally used to interpret and analyze social problems". Márdero, Gabriela.

CITIZEN SECURITY

The social situation in which all people can freely enjoy their fundamental rights, and in which public institutions have sufficient capacity, in the framework of the rule of law, to guarantee the exercise of those rights and respond effectively when they are violated (…) Citizenship is therefore the principal objective of protection by the State." UNDP. Human Development Report. New York: United Nations Development Program, 1994.

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Module 2
International mandates and instruments of the inter-American system

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

In the international and inter-American normative framework, to provide the arguments needed to promote long-term gender equality and progressive change, as a consensus of the international community.

General Concepts

Treaties and international and inter-American agreements provide the normative framework for promoting gender equality in public policies. They are important because they can help forge a consensus on progress needed on human rights and the role of the State that goes beyond the particular circumstances and interests of individual actors at any given historical or political moment. This has been very useful for gender equality interests.

The international norms or standards cover a wide range of areas of promotion of women's capacities and rights, including education, health, work, and equality of civil and political rights. In the OAS, the Inter-American Program on the Promotion of Women's Human Rights and Gender Equity and Equality (PIA) (2000), the Convention of Belém do Pará (1994), and the OAS Inter-American Democratic Charter (2001) are part of its normative framework. Direct mandates to the OAS come from the General Assembly, the Summits of the Americas, and resolutions from some specific Ministerial meetings.

CEDAW (1979) was the first legally binding international instrument of broad scope that explicitly recognized that "women continue to be subject to major discrimination", and stressed that such discrimination "violates the principles of equality of rights and respect for human dignity". It was the first international treaty that obliged governments to take measures to promote gender equality.

This Module will discuss various international instruments, including:

- World conferences
- Declarations
- Conventions and Treaties
- OAS mandates and resolutions

> The international community's instruments to promote human rights and women have represented major efforts to overcome the formal barriers that restrict people's access to a life of dignity in conditions of equality.

Some historical landmarks

1934	Convention on the Nationality of Women.
1945	Recognition of the principle of men and women's equality of rights and treatment in the United Nations Charter.
1948	Inter-American Convention on the Granting of Political Rights to Women.
1948	Inter-American Convention on the Granting of Civil Rights to Women.
1949	Convention for the Suppression of the Traffic in Persons and of the Exploitation of the Prostitution of Others.
1951	ILO Equal Remuneration Convention (equal remuneration for men and women workers for work of equal value).
1952	UN Convention on the Political Rights of Women.
1957	UN Convention on the Nationality of Married Women.
1960	UNESCO Convention Against Discrimination in Education
1962	UN Convention on Consent to Marriage, Minimum Age for Marriage and Registration of Marriages.
1967	Declaration on the Elimination of All Forms of Discrimination against Women.
1968	Proclamation of Teheran of the International Conference on Human Rights, including parents' reproductive rights.
1969	Inter-American Convention on Human Rights.
1975	First World Conference on Women, Mexico. UNIFEM and INSTRAW are created.
1979	Convention on the Elimination of all forms of Discrimination against Women (CEDAW).
1980	Second World Conference on Women in Copenhagen.
1985	Third World Conference on Women in Nairobi.
1989	Inter-American Convention on Support Obligations.
1992	UN Conference on Conference Environment and Development, Rio de Janeiro.
1993	Declaration on the Elimination of Violence against Women.
1994	Inter-American Convention on the Prevention, Punishment and Eradication of Violence against Women. Belém do Pará.
1994	World Conference on Population and Development in Cairo.
1995	Fourth World Conference on Women in Beijing.
2000	Declaration on the Millennium Development Objectives.
2000	Adoption of the Inter-American Program on the Promotion of Women's Human Rights and Gender Equity and Equality in the OAS.
2003	Protocol to Prevent, Suppress and Punish Trafficking in Persons, especially Women and Children (Palermo Protocol).
2007	Tenth Regional Conference on Women in Latin America and the Caribbean, Quito.
2010	Eleventh Regional on Women in Latin America and the Caribbean, Brasilia.

Source: Adapted from INMUJERES (2008).

World Conferences

World Conferences are policy agreements by the international community, which then become Action Plans and Programs signed by the countries, and therefore have specific implications for conditions in each country.

First United Nations World Conference on Women – Mexico 1975

This World Conference—the only one held in Latin America—declared the first decade of women under the title "Equality, development and peace".

Third World Conference on Women - Nairobi 1985

The Nairobi Forward-looking Strategies for the Advancement of Women were adopted at this Conference.

UN Conference on Environment and Development - Rio de Janeiro 1992

Recognized the vital role that women play in preserving and managing natural resources, and examined and proposed actions on the link between poverty, gender and the environment.

World Conference on Human Rights – Vienna 1993

For the first time in the history of humanity, this Conference recognized the human rights of women and girls as inalienable, and as an integral part of universal human rights. The Conference recommended that a Special United Nations Rapporteur be named on violence against women, on the understanding that human rights violations may occur in public and in private, and that both case may give rise to a responsibility of the State.

World Conference on Population and Development - Cairo 1994

The outcome of this Conference was a very specific Platform for Action, Chapter IV of which addressed gender equality and equity.

Fourth World Conference on Women – Beijing 1995

This Conference ended with a Declaration and an Action Plan that commits States to ensuring that their policies and programs reflect a gender perspective. This was the most comprehensive document ever produced by a United Nations conference. Some of the commitments are:

a. Ensure the full enjoyment by women and the girl child of all human rights and fundamental freedoms, and take effective action against violations of these rights and freedoms.

b. Take all necessary measures to eliminate all forms of discrimination against women and the girl child and remove all obstacles to gender equality and the advancement and empowerment of women.

c. Encourage men to participate fully in all actions towards equality.

d. Prevent and eliminate all forms of violence against women and girls.

e. Intensify efforts to ensure equal enjoyment of all human rights and fundamental freedoms for all women and girls.

f. Develop the fullest potential of girls and women of all ages, ensure their full and equal participation in building a better world for all and enhance their role in the development process.

World Conference against Racism, Racial Discrimination, Xenophobia and Related Intolerance – Durban 2001

Held August 31-September 8, 2001. Its main gender-related issues were trafficking in persons, particularly women and children; migration and discrimination; dual discrimination on the grounds of gender and race; racism against indigenous women; multi-ethnic States and protection of the rights of minorities.

Tenth Regional Conference on Women in Latin America and the Caribbean – Quito 2007

Twenty-six agreements were reached on different areas of development. The Conference adopted the Consensus of Quito, which recognized [gender] parity as "one of the driving forces of democracy, the purpose of which is to achieve equality in the exercise of power, in decision-making, in social and political participation and representation, in family relationships in various types of families, and social, economic, political and cultural relations".

II World Conference against Racism – Geneva 2009

Held April 20—24, 2009. Its purpose was to assess progress made towards the Plan developed in the World Conference of Durban in 2001.

I World People's Conference on Climate Change and the Rights of Mother Earth- Cochabamba 2010

Held on April 20, 2010 in Bolivia. The idea of "Living Well" was the main proposal for addressing climate change, restoring our harmony with Mother Earth as part of the legacy of the indigenous peoples.

Conventions

Convention on the Elimination of all forms of Discrimination against Women (CEDAW) of 1979

This international treaty, adopted by the United Nations in 1979, is concerned solely with women's right to non-discrimination. Under the Convention, States may take temporary special measures aimed at accelerating de facto equality between men and women; these shall not be considered discrimination as defined in the Convention, but rather as affirmative action measures. A majority of Latin American countries have signed this Convention[19]. Because of its binding nature, it is the most important Convention for women.

The Convention commits States, inter alia, to:

a. **Amend national laws to:**

- Enshrine the principle of equality and provide legal means of ensuring practical application of this principle.
- Ensure that women have the right of access to the courts and other public institutions to seek protection in the face of acts of discrimination.
- Establish punitive sanctions for acts of discrimination.
- Take steps to eliminate discrimination against women by individuals, organizations and enterprises.
- Derogate all legal provisions that discriminate against women.

b. **Eliminate discrimination:**

- In political and public life.
- In equal access to education.
- In access to health services, including family planning.
- In economic and social life, including employment.
- Take steps regarding the status of rural women.
- Recognize that men and women have the same legal capacity over family decisions.

Inter-American Convention on the Prevention, Punishment and Eradication of Violence against Women of 1994

The Convention of **Belem do Pará**, adopted by the OAS in the Brazilian city of the same name, entered into force in May 1995. Its fundamental contribution was to recognize the right of women to a life free of violence, and has inspired legislative advances on the question of gender violence in a number of countries of the region.

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[19] For status of signatures and ratifications, see: http://treaties.un.org/Pages/ViewDetails.aspx?src=TREATY&mtdsg_no=IV-8&chapter=4&lang=en

With the adoption of the Convention of Belém do Pará, the Inter-American Commission of Women (CIM) received a mandate to promote the right of women to live lives free of violence. To this end, the Follow-up Mechanism to the Belém do Pará Convention (MESECVI) was established, with two fundamental components: the Conference of States Party, and the Committee of Experts (CEVI):

- The **Conference of States Party** is composed of the thirty-two OAS member states that signed, ratified or acceded to the Convention of Belém do Pará. The principal functions of the Conference are: i) to set guidelines for the work of the Committee of Experts (CEVI); ii) to receive, examine and evaluate the CEVI's reports and recommendations, and iii) to publish and disseminate the Hemispheric Report of the MESECVI. The Conference meets every two years.

- The **Committee of Experts** is composed of national experts named by their respective State Party to serve on the MESECVI in a personal capacity. Its main functions include: i) developing an evaluation methodology and establish a timetable of work; ii) receiving and evaluating the reports from the States Party, and preparing recommendations; and iii) presenting its reports to the Conference of States Party.

Status of signatures and ratifications of and accessions to the Convention:

SIGNATORY COUNTRIES	DATE	RA/AC	DEPOSIT	INST[20]
Antigua and Barbuda	/ /	08/12/98	11/19/98	AD
Argentina	06/10/94	04/09/96	07/05/96	RA
Bahamas (Commonwealth of)	05/16/95	05/03/95	05/16/95	AD
Barbados	05/16/95	02/08/95	05/16/95	RA
Belize	11/15/96	11/25/96	11/25/96	AD
Bolivia	09/14/94	10/26/94	12/05/94	RA
Brazil	06/09/94	11/16/95	11/27/95	RA
Chile	10/17/94	10/24/96	11/15/96	RA
Colombia	/ /	10/03/96	11/15/96	AD
Costa Rica	06/09/94	07/05/95	07/12/95	RA
Dominica	/ /	06/30/95	06/06/95	RA
Dominican Republic	06/09/94	01/10/96	03/07/96	RA
Ecuador	01/10/95	06/30/95	09/15/95	RA
El Salvador	08/14/95	11/13/95	01/26/96	RA
Grenada	/ /	11/29/00	02/15/01	RA
Guatemala	06/24/94	01/04/95	04/04/95	RA
Guyana	01/10/95	01/08/96	02/28/96	RA
Haiti	/ /	04/07/97	06/02/97	AD
Honduras	06/10/94	07/04/95	07/12/95	RA
Jamaica	12/14/05	11/11/05	12/14/05	RA
Mexico	06/04/95	06/19/98	11/12/98	RA
Nicaragua	06/09/94	10/06/95	12/12/95	RA
Panama	10/05/94	04/26/95	07/12/95	RA
Paraguay	10/17/95	09/29/95	10/18/95	RA
Peru	07/12/95	04/02/96	06/04/96	RA
St. Vincent & Grenadines	03/05/96	05/23/96	05/31/96	RA
Saint Lucia	11/11/94	03/08/95	04/04/95	RA
St. Kitts & Nevis	06/09/94	03/17/95	06/12/95	RA
Suriname	/ /	02/19/02	03/08/02	RA
Trinidad & Tobago	11/03/95	01/04/96	05/08/96	RA
Uruguay	06/30/94	01/04/96	04/02/96	RA
Venezuela	06/09/94	01/16/95	02/03/95	RA

Source: OAS Multilateral Treaties: http://www.oas.org/juridico/english/sigs/a-61.html

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[20] Instruments: RA = RATIFICATION / R = RESERVATION / AC = RECOGNITION / AD = ACCESSION

Convention and Treaties

Conventions are international instruments that are the results of accords among countries. They have a strong technical component, in an effort to make earlier, more general commitments, concrete and binding.

Some ILO Conventions

Since its creation in 1919, the International Labor Organization (ILO) has adopted many accords and recommendations on gender matters. At the beginning, these referred particularly to maternity protection, and then addressed working conditions that in those days were considered unacceptable, up to today, when they cover equality before the law, and true equality of opportunities, treatment and outcomes.

Today, we refer to "workers of both sexes with family responsibilities", which means taking another look at the old paradigm of how productive and reproductive work is organized in society. This effort took off in the nineteen seventies when women began to enter the productive labor force *en masse*.

a. Maternity protection – ILO Convention 183 and Recommendation 191

This Convention is an improved version of one of ILO's concerns since it was founded, namely protection of pregnancy, to ensure compliance with the following basic points: maternity leave, job protection, medical and cash benefits, and protection of health and breast-feeding. These agreements have been largely incorporated into national laws around the world. Recommendation 191 proposes that maternity leave be given for at least 18 weeks, that maternity leave be extended for multiple births, and that these guarantees and rights also apply to cases of adoption. It also covers paternal leave in the case of the death of the mother, among other things.

b. Equality of opportunity and treatment for male and female workers – Convention 156 and Recommendation 165

Emphasis on the topic of family responsibilities, the idea of domestic work of care giving. It opened up an area of public policy to help people with family responsibilities exercise their right to paid work. This Convention also deals with issues such as free choice of employment and access to vocational guidance and training. It suggests measures for local and regional planning, bearing in mind the needs of the unemployed and the provision of community services, public and private, for childcare and family services.

Recommendation 165 focuses on ensuring that male and female workers with family responsibilities can obtain employment, stay in the job and return to it. It includes measures to improve working conditions, in particular, reducing the workday, flexible working hours, part-time work and work from home. For the first time, it proposes that both parents could use maternity/paternity leave to take care of newborn children and sick children.

Declarations

Universal Declaration of Human Rights (1948)

At the center of this Declaration is recognition of equality in generic terms, as well as non-discrimination on account of sex. The discussion is, however, now about the application and exercise of equality for both sexes (Durán, 2005).

United Nations Millennium Declaration (2000)

Both during the preparatory meetings and at the debate at the Millenium Summit itself (held in New York in 2000), advances were made on specific, measurable objectives on gender equity; the empowerment of women was considered to be a development priority.

The OAS has joined this world-wide effort by adopting the Millenium Development Goals (MGDs) into the Organization's strategic and normative frameworks.

United Nations Declaration on the Rights of Indigenous Peoples (2007)

This international treaty, which refers exclusively to the rights of indigenous peoples, was adopted on September 13, 2007, with the purpose of ensuring that the rights of indigenous peoples be recognized. The drafting and negotiation of the text of the Declaration was a lengthy process that lasted more than twenty years. Representatives of indigenous organizations, delegations from member states, legal experts and NGOs participated in. Importantly, no other international agreement was drawn up with the participation of all parties involved in the way that this one was.

> "All the rights and freedoms recognized herein are equally guaranteed to male and female indigenous individuals."
>
> Article N° 44

OAS mandates and resolutions

The OAS General Assembly declared 2010 as the Inter-American Year of Women, under the banner of "Women and Power: for a World of Equality" aimed at reversing the constraints women face in occupying positions of power and decision-making in society.

The Inter-American Commission of Women was created in 1928 in Havana, Cuba, giving voice to a grassroots women's movement that had demanded to participate in the Sixth International Conference of American States, and had also demanded ratification of the 1923 Equal Rights Treaty. For the first time, women in this Conference were able to speak officially in a plenary session, accompanied by more than a thousand women who filled every corner of the great conference hall at the University of Havana. The Equal Rights Treaty was not ratified on that occasion, but the Inter-American Commission of Women (CIM) was created. Since that time, CIM has made many contributions, which continue to this day, to advancing women's exercise of their rights, particularly their civil and political rights.

The Conventions

The Organization of American States (OAS) has witnessed many accords among its member states, on many varied topics. In the area of gender, the following are of note:

> **Inter-American Convention on Human Rights (1969).**
>
> **Inter-American Convention on the Granting of Political Rights to Women (1948).**
>
> **Inter-American Convention on the Granting of Civil Rights to Women (1948).**
>
> **Convention on the Nationality of Married Women (1957).**
>
> **Inter-American Convention on Support Obligations (1989).**

General Assembly resolutions

In 2000, the OAS General Assembly adopted a landmark resolution on gender: the *Inter-American Program on the Promotion of Women's Human Rights and Gender Equity and Equality (PIA)*, in which it decided:

"2.1.2   Ensure that a gender perspective is consistently mainstreamed into the preparation and application of international instruments, mechanisms, and procedures within the framework of the OAS, and particularly on the agendas of ministerial-level meetings."

"2.1.4   Provide all organs, agencies, and entities of the OAS system with the necessary training to incorporate the gender perspective into their work and to prepare suitable tools for attaining this program's main objectives, tapping, where applicable, the experience of other international organizations, cooperation agencies, and member states."

Article 9 of the Inter-American Democratic Charter, adopted on September 11, 2001, states that: "The elimination of all forms of discrimination, especially gender, ethnic and race discrimination, as well as diverse forms of intolerance, the promotion and protection of human rights of indigenous peoples and migrants, and respect for ethnic, cultural and religious diversity in the Americas contribute to strengthening democracy and citizen participation."

Subsequently, the international community's debates on the matter produced two important resolutions in the OAS, one in 2007 and the other in 2009, which state:

AG/RES. 2324 (XXXVII-O/07)
PROMOTION OF WOMEN'S HUMAN RIGHTS AND GENDER EQUALITY AND EQUALITY
(Adopted at the fourth plenary session, held on June 5, 2007)

To urge the Secretary General to:

c. Continue working with the CIM to ensure the integration of a gender perspective in the development of the programs and actions of all the organs, agencies, and entities of the Organization;

AG/RES. 2454 (XXXIX-O/09)
PROMOTION OF WOMEN'S HUMAN RIGHTS AND GENDER EQUITY AND EQUALITY
(Adopted at the fourth plenary session, held on June 4, 2009)

To urge the Secretary General to:

a. Continue, with support from the CIM, promoting and working on full implementation of the IAP so as to achieve integration of a gender perspective into all programs, activities, and policies of the Organization of American States (OAS);

b. Request the organs, agencies, and entities of the Organization to include in their annual reports to the General Assembly their initiatives to mainstream the gender perspective into their policies, programs, projects, and activities, and to forward that information to the CIM so that it may be included in the annual report to the General Assembly that is drawn up pursuant to this resolution;…

CIM has been given other mandates covering a broad array of topics and activities: i) the CIM Assembly of Delegates and the Executive Committee; ii) the Meetings of Ministers or of the Highest-ranking Authorities responsible for the Advancement of Women in the Member States (REMIM); iii) the OAS General Assembly; iv) the Summits of the Americas, and v) other intergovernmental agreements such as the Convention of Belém do Pará and the Inter-American Democratic Charter.

Over the last two years (2008-2010), CIM received 25 specific mandates from its thirty-fourth Assembly of Delegates (November 2008), 45 specific mandates from the sessions of its Executive Committee that took place during the same period, and 37 mandates from the OAS General Assembly.

At the fortieth regular session of the OAS General Assembly (Lima, 2010), the member states reaffirmed their commitment to execution of the PIA. The Program, which began in 2000, has been revised[21] and strengthened by an updated Strategic Plan 2011-2016.

Summits of the Americas

Quebec Summit (2000)

Gender equality objectives were included in the Quebec Summit's Plan of Action, and a specific chapter on gender equality was adopted.

Special Summit of Monterrey (2004)

The Declaration of Nuevo León adopted at this Summit reiterated the commitment to continue promoting gender equity and equality, and the mandates of the Summits of the Americas on this matter.

Fourth Summit, Mar del Plata (2005)

This Summit dealt essentially with the issue of decent work and strengthening of democratic governance. It reaffirmed the member states' determination to combat gender discrimination in the workplace.

Fifth Summit, Port of Spain (2009)

Commitment to strengthen institutional mechanisms for the advancement of women, including the Follow-up Mechanism to the Belém do Pará Convention (MESECVI), and financing for it; to promote the full and equal participation of women in political life and in decision-making at all levels, through laws and policies that promote respect for women's human rights and fundamental liberties, and for gender equality and equity. It further committed to promoting and assuring the inclusion of a gender perspective in national and hemispheric policies, plans and programs that are carried out in the various sectors.

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[21] CIM/doc.7/10

The OAS gender equality normative frameworks are, in summary, as follows:

1. Citizenship and political rights

- *American Convention on Human Rights, OAS 1969*
- *Inter-American Convention on the Granting of Political Rights to Women, OAS 1948*
- *International Covenant on Civil and Political Rights, UN 1966*
- *Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), UN 1979*
- *Inter-American Convention on the Prevention, Punishment and Eradication of Violence against Women, OAS 1994*
- *Inter-American Democratic Charter, OAS, 2001*

2. Women's economic, social and cultural rights

- *International Covenant on Economic, Social and Cultural Rights, UN 1966*
- *Convention on the Elimination of all forms of Discrimination against Women, UN 1979*
- *Additional Protocol to the American Convention on Human Rights in the area of Economic, Social and Cultural Rights, "Protocol of San Salvador", OAS 1988*
- *Optional Protocol to the CEDAW, UN 1999*
- *ILO Conventions and Recommendations on labor rights*
- *The most recent commitments of the inter-American system are contained in the Inter-American Program on the Promotion of Women's Human Rights and Gender Equity and Equality [AG/RES.1732/00 (XXX-O/00)], and the Plan of Action for Participation in Structures of Power and Decision-Making [CIM/RES 198 (XXIX-O/98)].*

3. Multidimensional security from a gender perspective

- *International Covenant on Civil and Political Rights, UN 1966*
- *American Convention on Human Rights, OAS 1969*
- *Convention on the Elimination of all forms of Discrimination against Women, UN 1979*
- *Inter-American Convention on the Prevention, Punishment and Eradication of Violence against Women, OAS 1994*
- *UN Security Council resolutions 1325, 1820, 1888 y 1889 on Women, Peace and Security*
- *Universal Declaration of Human Rights, UN,*

4. Women's human rights

Convention on the Elimination of all forms of Discrimination against Women
- *Article 2. "The States Party States Parties condemn discrimination against women in all its forms, agree to pursue by all appropriate means and without delay a policy of eliminating discrimination against women..."*
- *Article 3. "The States Parties shall take in all fields, in particular in the political, social, economic and cultural fields, all appropriate measures, including legislation, to ensure the full development and advancement of women, for the purpose of guaranteeing them the exercise and enjoyment of human rights and fundamental freedoms on a basis of equality with men."*

Inter-American Convention on the Prevention, Punishment and Eradication of Violence against Women, "Convention of Belém do Pará"
- *Article 4. "Every woman has the right to the recognition, enjoyment, exercise and protection of all human rights and freedoms embodied in regional and international human rights instruments..."*

Glossary

CONVENTION

The term "Convention" is generally used for formal multilateral treaties to which there are many Parties. Normally, instruments negotiated under the auspices of an international organization or one of its agencies are called Conventions.

INTERNATIONAL COVENANT, PACT OR TREATY

Written agreement between two or more States, governed by international law and binding on the Parties that ratify it.

RATIFICATION OF A TREATY

Ratification, adoption and/or accession refer to the act whereby a State consents to be bound by a Treaty.

OPTIONAL PROTOCOL

At times, human rights treaties have been followed by Optional Protocols, which establish certain procedures in relation to the Treaty, or develop certain content more extensively. Optional Protocols to international human rights treaties are Treaties in their own right, open to signature, accession or ratification by those countries that are Party to the main Treaty.

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Module 3
Evaluability of gender-sensitive project profiles

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To provide tools for assessing the viability of a
project that will be developed and executed
using a gender equality focus

What is evaluability?

The purpose of this module is to familiarize those responsible for project planning and management with the concept of evaluability. Although a formal evaluability study is not done for all projects, it is important that the concept and the ideas be understood at the time when project profiles are submitted, and beyond that, to understand what makes the project add value and what should be borne in mind prior to the approval of the project, if we want it to include a gender focus.

1. What is an evaluability study that has a gender focus[22]?

An evaluability study is a systematic process that helps determine whether certain conditions are present that will enable us to include a gender focus in a particular project, and whether those conditions are fully justified, feasible and capable of contributing useful information. The purpose of an evaluability study is to determine whether to include a gender focus in the project and to develop the project profile it so as to create the necessary conditions in which that can occur.

It is advisable to conduct this type of study before applying a gender focus to the project itself, since the evaluation of the profile is a first step in ensuring that such a focus will be viable and useful for in the future project. An evaluability study may also be carried out as part of the mid-term project review, in order to identify areas that need improvement, both in the management and in design, in order to include an appropriate gender focus throughout the project.

It should be noted that a gender-sensitive **evaluability study is no substitute for a good program design, nor for project monitoring.** Rather, it is a simple tool to help managers determine whether the situation is such that the project can go forward, and enable them to cover any gaps. It is also useful for management teams that must make decisions on the course a project profile will take within the institution.

This tool requires prior knowledge of the project (preferably, in a profile format), since, depending on the scope of the project, it may be necessary to conduct such a study of the entire project once it is written, and sometimes, it should be done by a professional external evaluator.

2. Does a gender approach apply to the project?

Firstly, it is important to point out that there is usually a **tendency to avoid the possibility of including a gender focus in projects.** This is almost always because those who design and/or implement projects have the idea that including a gender focus will entail additional work, or else because they do not know how to do so and what issues should be looked at before considering using it. We therefore suggest that all projects involving people can incorporate a gender focus in different ways, as well as in projects whose ultimate goal is to improve people's living conditions. Much specialized literature has shown the benefits that a gender focus can bring to improving project effectiveness and therefore a project's ability to resolve peoples' specific needs and problems, and to create a public value for project beneficiaries and, cumulatively, for society as a whole.

Whenever a gender dimension is not included in projects, we may find: (a) a high degree of subjectivity and error as to the meaning of observable differences between women and men in a project, whether during the assessment or during execution; (b) the outcomes of a project may be attributed to factors inherent in the differences between sexes, rather than to structural causes in the sex-gender system.

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[22] Taken from Guides to evaluation. Office of Evaluation, UN Women. New York. 2011.

A gender-sensitive evaluability study will produce recommendations about how to improve the project profile so that it is ready for formulation and/or execution – or, it may be concluded that it is yet not ready.

Project limitations are often found in three areas: design, availability of relevant information, and the existence of a favorable context. The checklist below outlines the conditions that should be taken into account here. These conditions are normally the main parameters of the study on the evaluability of a gender focus in a project.

Checklist for the evaluability of a gender focus in project profiles		
Parameters of evaluability	**Main questions**	
Mandates	Is the project based on and backed up by a specific mandate in the Group of Mandates on promotion and protection of women's rights in the Human Rights pillar?	
	Is the project based on achieving gender equity as an unquestionable and essential part of its implementation, but is not clearly associated with the promotion and protection of women's rights Group of Mandates?	
	Is the project aligned with the Strategic Plan of the Inter-American Commission of Women?	
Relevance	Is the project aligned with some broader program or plan that includes work on gender equity?	
	Does the donor require that gender be considered in the formulation of the project?	
	Does the project address a strategic area for overcoming gender inequities or for promoting the empowerment of women?	
	Do the authorities of the member states or project counterpart institutions have a particular interest in including gender considerations?	
Program design	Does the project clearly define the problem to be resolved, and is it related to men and women?	
	Are the gender inequality factors and women's needs clearly and explicitly identified?	
	Has the program beneficiary population been disaggregated by sex?	
	Is it consonant with the strategies defined by the Unit responsible for the issue of gender?	
	Are the anticipated results of the project geared explicitly or implicitly to gender equity and/or empowerment of women?	
	Do the results respond to needs identified for women and men?	
	Do those results include gender equity and equality or the empowerment of women?	
Availability of information	Is the baseline information needed for an assessment disaggregated by sex available?	
	Can the project provide sex-disaggregated data as part of its baseline for formulating an intervention?	
	Do the stakeholders request information on gender matters?	
	Can the interested parties contribute sex-disaggregated information to the project?	

Parameters of evaluability	Main questions	
Favorable context[23]	Is the context conducive to incorporating a gender equality focus into the formulation of the project?	
	Is the context conducive to incorporating a gender equality focus in the process of project execution?	
	Is the context conducive to incorporating a gender equality focus in the evaluation of the project?	
	Has provision been made in the budget for incorporating a gender approach into the different phases of the project (properly trained staff, funds, equipment)?	
	Does the institution have the capacity and expertise to incorporate a gender equality perspective in the project formulation phase?	
	Does the institution have the capacity and expertise to incorporate a gender equality perspective into the project execution phase?	
	Does the institution have the capacity and expertise to incorporate a gender equality perspective into the project evaluation phase?	

Source: Adapted from the UN Guide to the evaluability of projects. UN Women, 2010).

3. How to conduct a gender-sensitive evaluability study of the project profile or of the project itself

This will generally require using a variety of quantitative and qualitative data collection methods to refine our assessment of the changes/results that we hope to achieve. It may also include secondary data analysis and interviews with the main interested parties. Depending on time available and the scope of work, it may take days, weeks or months.

Some authors propose taking the following steps in evaluability studies[24]:

a. Involving the anticipated users of the information that will be needed in the project, or that the project itself may generate.

b. Clarifying the project proposal from the points of view of decision-makers, program managers, those involved in generating outcomes, and other interested parties.

c. Examine the realities of the project, including the possibility that it will achieve and quantify its goals.

d. Come to agreement on changes that may be needed to the project activities and goals, using the above checklist.

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[23] A context conducive to incorporating a gender equality approach is one for which there is a normative framework for the area to be analyzed, and that can draw on an institutional capacity of personnel trained to do a gender analysis, specific institutional mandates, donor indications on the topic, etc.

[24] The main steps for conducting evaluability studies have been taken from Wholey, J.S., Hatry, P.H Newcomer (2004) *Handbook of Practical Programme Evaluation, pp.* 33- 41.

e. Explore designs for alternative participatory projects.

f. Agree on project priorities and the uses to which the information obtained will be put.

> *EXAMPLE OF THE CONSEQUENCES OF AN OMISSION:*
>
> *"The mid-term evaluation of a forestry project for women, carried out by the Ministry of the Environment and Natural Resources of Nicaragua (MARENA), identified a number of obstacles that had arisen in the first two years of project execution and that had not been taken into account at the time the project was drafted. These obstacles included agricultural and lending policies that limited women's access to resources; limited access to economic resources, means of production, and decision-making; high birthrates, illiteracy, triple workdays and vulnerability to institutional and family violence; and extension workers who could not communicate well or who were not trained for the hours of work, work load, etc."*
>
> Mayorga, Arleen. (1994). "Conocimiento y experiencia en proyectos integrados en los recursos forestales. Hacia una estrategia de género". Remarks to a seminar on Issues of Gender and Cooperation in Latin America, ASDI. Managua. Taken from a mimeographed copy of Barig and Ruiz-Bravo. (Spanish only).

4. How to incorporate gender equality into a project

Below are some examples of explicit questions to be asked in incorporating a gender focus into projects[25]:

a)   **In the project goal:**

- Achieving full exercise of women's human rights (citizenship), empowerment and autonomy to plan their lives without family, social and/or institutional constraints, and create the objective and subjective conditions for self-determination.

- Accelerate changes in attitudes and behaviors that discriminate against women and men based on the sex-gender system, by redefining traditional gender identities into identities geared to equity, respect for human rights and harmonious, non-violent relations grounded in solidarity and dignity.

- Mobilize and involve men in actions to eliminate women's gender discrimination, inequities and inequalities, and help them expand their understanding of the economic, social, legal and political factors that may impede the exercise of egalitarian gender roles. Men should also

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[25] Adapted from Belkis Mones, in Methodological guide to incorporating a gender equity perspective in UNFPA's population and development programs. (Unpublished manuscript).

understand the implications for an equitable society of their position of power, their control over national decisions, and their privileged access to productive and social resources.

- Make sure that the political conditions are in place for women's citizen security and safety, via true access to justice (without mediation or gender biases).

- Ensure that institutional mechanisms are in place for the equitable distribution of productive resources and of the benefits they produce.

- Promote and commit development actions to achieving more democratic decisions and resources within the family, and an equitable distribution of family responsibilities and household chores.

- Reduce or mitigate the disadvantages to which men and women are exposed because of their gender.

- Encourage the adoption of Equal Opportunity Plans for the staff of public agencies, in order to overcome sex-based segmentation and wage gaps of public employees.

b)   **In the concept and methodology:**

- All dimensions of the social construct of gender and/or the sex-gender system should be present in the analysis, definition and implementation of development policies, programs and projects. Particular stress should be laid on power relationships, which underlie interactions among all actors.

- Take into account two inter-related conceptual and methodological dimensions: the relational dimension of women's relative gender position, vs. that of men in the socio-economic, political and cultural context of the country, region or community.

- In the various areas of development, identify and analyze the causes, consequences and implications of gender relations, and how they impact and condition differentiated attitudes, values, beliefs, behaviors and decisions of women and men, and thus create and maintain inequities and inequalities.

- Analyze practical and strategic gender needs in determining problems in a project, and link them to rights that can be satisfied immediately, and rights that will be gradually or progressively realized.

c)   **In the proposed overall strategies:**

- Personal and collective empowerment of women, based on the idea of change and transformation, in order to expand their opportunities to develop capacities and skills in all areas of economic, social and political life.

- Increase women's participation in and influence on decision-making nationally, regionally and locally, in all areas where public policies and social norms are determined.

- Assure women of greater access to and use, control and ownership of productive and social resources, so that they have the conditions needed for development and security.

- Promote men's awareness of their gender status and position, through greater understanding of how gender identities are changing in today's world. Greater awareness may foster a positive

- Promote equitable distribution of family and domestic responsibilities among women and men, as being central to democratizing private life.

- Produce data and statistics that will make gender inequities visible, in an effort to formulate and evaluate gender-sensitive economic and social policies.

- Promote the creation of fora for coordination, consultation, information-exchange and participation of civil society, in particular with women's organizations, in defining organizational guidelines, strategies and projects at different levels.

Glossary

GENDER DISCRIMINATION

Any and all distinction, exclusion or restriction based on sex, the purpose or outcome of which is to undermine or deny recognition, enjoyment or exercise of political, social, cultural or civil human rights and fundamental liberties based on the inequality between men and women.

SEX-GENDER SYSTEM

Understood as the set of socio-economic and political structures that maintain and perpetuate the traditional roles of male and female, and what is classically attributed to men and women. The term can also be equated with the "gender social contract", referring to a set of implicit and explicit norms that govern relations between men and women and that attribute different work, value, responsibilities and obligations to men and women. This can be seen at three levels: a) the cultural superstructure (society's norms and values), b) institutions (systems for protection of the family, education and employment, etc.), and c) socialization processes (mainly the family).

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Module 4
A gender equality approach to stakeholder analysis

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To understand and use gender-sensitive tools for stakeholder analysis.

Introduction

The literature has shown that one factor that contributes the most to the success of a project is the participation in project planning, from the outset, of the stakeholders directly affected by the project or intervention (whether they execute the project and are duty-bearers, or whether they are beneficiaries and are rights-holders). There has therefore been much interest in recent years in specific methodologies for including the stakeholders right from the beginning of a project.

As in previous Modules, we shall discuss some ideas for using a stakeholder analysis method to refine the process from a gender equality approach.
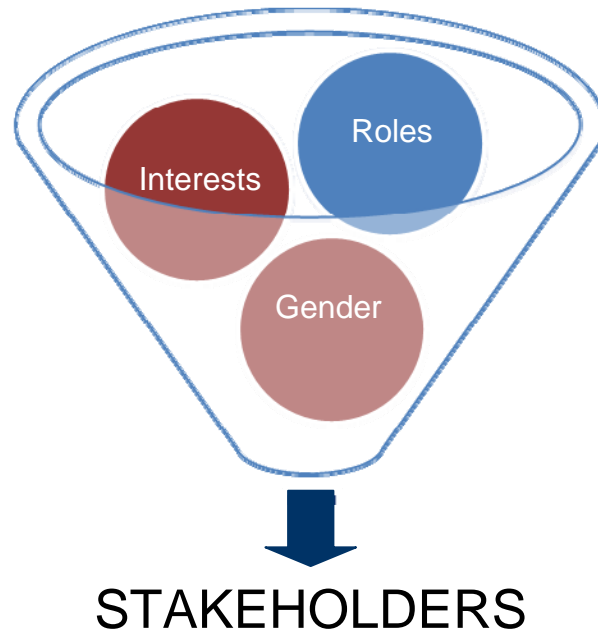
Who are stakeholders?

Firstly, it is important to look at who will be considered as stakeholders in a particular project, even though we may always use certain categories that will make selection easier.

In general, stakeholders are "entities, organizations, groups or individuals who have a direct or indirect interest in the development intervention or in the evaluation of it" (OECD Glossary, 2002). Similarly, those who are affected positively or negatively by the problem raised in the project, or by the solution, implementation and/or evaluation of the project should also be considered stakeholders.

"Stakeholder analysis identifies those individuals, groups and institutions that may influence a program or project, or be affected by it; it clarifies the roles and interests of each group of actors; lays the groundwork for their participation in successive phases of the project; provokes reflection on gender considerations both in the institution and in the project, by making it necessary to acknowledge the interests and capacities of women and men in the project."

Inter-American Development Bank (IDB), 2002.

From a gender perspective, the actors involved in a project should be analyzed basically in terms of:

Interests

Roles

Gender

STAKEHOLDERS

1. Usual phases of a stakeholder analysis:

a) **Make a list of all stakeholders, both those in favor of or against the project**

Stakeholders should be grouped according to certain characteristics, such as: whether they work for government agencies, or private organizations; their relationship to the project: whether they are outside or inside the project (contractors or employees); whether they are close to the project or far removed from it, and any other factors that may be useful, including whether they are organizations that have a particular point of view on gender equity, or whether they are part of the country's or community's women' movement.

b) **Define their interests in and perceptions of the specific problems to be addressed**

Interests are the goals that groups, organizations or leaders pursue, that is, their expectations as to benefits and rights. They express their interests, hopes and motives regarding the proposed action. For example, if the problem is one of road connections in a rural area, women will probably have a particular interest in the construction of a road or highway because it might mean less housework (less washing of children's clothes, less dust inside their houses, domestic appliances will last longer, and so on). However, for the men – if they are agricultural workers-, it may mean a threat to their farm production because land would be expropriated, or their animals may become involved in more accidents, and so they will show less interest in the construction or paving of a road.

We may ask ourselves the following questions: what are these groups' expectations for the project? Are the interests the same for the women and for the men who belong to the groups? What do they (men and women) think will occur as a result of the project? What do they think is the problem that the project will solve or cause? What are the resources that stakeholders are prepared to commit to influence in favor of the project or against it?

The problems perceived by the actors are the perceptions they have of the problem to be addressed, including clear identification of the problems that affect each group of actors, with the information broken down by women and men.

c) Identify each group's resources and mandates in relation to the problem

Identify the strategic information needed to estimate the strengths and weakness of each actor. Specifically, identify which resources (materials, intellectual and intangible) each group of actors is disposed to commit to the proposed action, or against it; and what institutional responsibility each group of actors has. This information should also be disaggregated by sex, inasmuch as within some organizations, the resources contributed by women are made invisible or are subordinated (their organizational or financial management capacities, for example).

d) Identify conflicts and alliances that might arise over the project among groups of actors

Identify the main conflicts of interest, patterns of cooperation and alliances that each group of actors has with the rest, in order to develop theories about those alliances and conflicts, and about how they may evolve over time. In this context, it is probable that women will be less familiar with negotiation and forming partnerships/alliances, and will be under-represented in the leadership of the organizations, and indeed, in positions in government institutions, all of which must be considered in the analysis.

The groups that are important to a project must be clearly identified: exclusion of any group might cause problems with the validity of the agreements reached in the project; inclusion of less relevant groups could distort the problem and bias the demands, which might not then be able to be met. Remember that the groups that feel identified with the project design team will mobilize their resources to support the work that will be done. Groups that are excluded or minimized may mobilize their resources to boycott the project, and so it is essential to know the groups when negotiating support, or to have an exit strategy with respect to possible opposition groups.[26]

Conducting a gender-sensitive stakeholder analysis

Existing instruments should be adapted to include a dimension of gender considerations, which will make reference to the GAPS, INEQUITIES and BARRIERS that may be affecting the way in which stakeholders express their interests. At the same time, a more detailed analysis should be done of the roles that each actor has in terms of access to and control of resources and benefits. The classic analysis matrix including a gender equality approach might be as shown below:

Table 1
Basic matrix for a gender-sensitive stakeholder analysis

GROUP	INTERESTS	PERCEIVED PROBLEMS	RESOURCES AND MANDATES	POTENTIAL CONFLICTS	ROLES	GENDER CONSIDERATIONS

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[26]León, Carlos. Stakeholder analysis. Evaluation of investments. http://www.eumed.net/libros/2007a/232/4c.htm

To complete this table, it will be necessary to answer the following questions, at a minimum:

- *Who are we specifically interested in involving in the project and why?*

  Pay attention to groups that are traditionally kept invisible. For example, female rural development promoters are often not taken into account in the design of a new project in their communities, even knowing that they have the resource of "time available" for project execution.

- *What specific role or contribution can this actor make to the project? And at what stage of the project?*

  In intercultural contexts, it is important to include those groups who make unpaid contributions to the work of the community – or even to management of public government programs, as often happens with indigenous or Afro-descendent midwives in maternal mortality prevention programs, or with traditional doctors in remote areas.

- *What are the identifying characteristics and interests of those we want to involve?*

  In considering a gender equality approach, we must distinguish between different groups' practical interests and strategic interests[27]. In some cases, the projects may contribute to closing gender gaps in access to basic goods and services – their practical needs; we may also examine issues beyond questions of access, such as quality, inclusiveness and strategic interests.

- *What benefits does each of them obtain from participating in the project?*

  Project benefits are generally associated with positive results achieved and distributed at the end of an intervention. However, from a gender equality perspective, the very process of designing a project, at the stage of stakeholder identification and analysis, may bring benefits in terms of visibility, positioning and recognition of the actors involved from the standpoint of symbolic equity[28].

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[27] By practical gender needs, we understand needs that are derived from the social functions ascribed to women by the sexual division of work, and that are related to survival and protection (access to land, water, services, technology, work, etc.) Strategic needs are understood to mean needs derived from the subordinate position of women—participation and exercise of power—and that are geared to reversing that position (elimination of institutional forms of discrimination, sex-differentiated access to resources, free decisions on pregnancy, etc.).

[28] According to Nancy Fraser (1997), gender equity is defined on the basis of justice, in two broad fields of equity policy: distributive justice, associated with socio-economic equity and policies on the distribution of resources and basic services; and cultural or intangible justice, associated with policies of recognition of and measures to combat discrimination against sectors of society, such as women, subordinated ethnic groups, sexual minorities and socially-excluded groups. Both concepts require specific policies and measures, which are not always easy to reconcile, but both are indispensable to developing a "single comprehensive conceptual framework" to ensure that policies do in fact contribute to a more just society.

Table 2
Example of a gender-sensitive stakeholder matrix (adapted)
Example based on the project: Incorporation of a gender perspective into OAS electoral observation missions

Stakeholders	Interests and Roles	Gender considerations
Electoral observation missions	Direct beneficiaries	They do not have sufficient information or training to include the participation of women and men as an essential feature of election monitoring. They invest little time in including a gender analysis in their assessments, because they feel that it does not affect the overall outcome of the election process. They have limited relations with organizations concerned with the political participation of women. Not complying with institutional mandates and commitments, namely, the basic principle of the Inter-American Democratic Charter: equal participation of women and men in politics and elections.
Department of Planning and Evaluation	Project executing agency	Gender analysis has not been included overall as an essential part of electoral observation and monitoring missions. Gender issues are included as an isolated component of electoral observation activities. Does not have staff who are specialized in gender analysis and who could help revise the forms used by the electoral observation missions.
Inter-American Commission of Women	Counterpart agency	Does not have the resources or the political power to influence the various areas of the inter-American system. Limited participation in decision-making on electoral observation processes.

Source: Developed by the author

Limitations on stakeholder analysis:

- The technique must be handled well, because conflict may occur if consideration is not given to all actors or all of their interests,
- There may be a tendency to play down conflict, if diversity and disagreement is not understood as part of the process of bringing the actors together.
- At times, stakeholders are not represented, or are not representative of a group, but rather are closer to the project design team.

Glossary

ACTORS
Those individuals or social groups that have certain attributes and strategic resources that make them capable of affecting and/or influencing projects.

GENDER CONSIDERATIONS
Describe the relative status and power relationships between women and men in their different spheres of interaction: the family, work, community and public life.

Can indicate the limitations and opportunities that women and men from different socio-economic or cultural groups face as a function of their gender roles.

STAKEHOLDERS
Population directly or indirectly affected by a problem or by a policy; they are not necessarily actors.

INTERESTS
The particular goal of each person involved (in some cases, may correspond to the organization's objective) and that is directly related to their perceptions of the problem to be addressed.

RESOURCES
Material and intangible resources that each actor is willing and able to commit to or against the action.

MANDATES
The organizational responsibility of groups. Helps estimate each actor's strengths and weaknesses vis-à-vis his or her obligations.

PROBLEM
The perception that each stakeholder has of a particular situation in which (at least for some people), there is a gap between what is perceived, and what is thought should occur in order to improve it.

STRATEGY
Action plan to be consciously undertaken to address a specific situation and resolve it successfully.

EMPOWERMENT
A concept that has become part of planning only in recent years. It is important for gender issues, since, from women's point of view, it is a strategic engagement in generating and consolidating processes of emancipation, development and personal and collective growth. It has also taken on importance for the struggles of other sectors of society that are discriminated against and that are disadvantaged.

Empowerment refers to the process whereby subordinated or disadvantaged groups can access power and impact decisions that affect them directly.

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Module 5
Gender assessments

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To understand and use diagnostic tools to identify gender equality problems, needs, gaps, inequities and barriers

In the project planning cycle, the assessment is the moment when the initial situation that we wish to change is identified, and the problem or problems in which we want to intervene are determined. Preparing an assessment and problem analysis means analyzing the cause and effect relationships among the various features of the initial situation.

Two tools are generally used for the assessment in a Results-Based Management approach: stakeholder analysis[29] and problem analysis. This Module is concerned with the latter, and will broaden its scope a little in light of certain gender analysis guidelines.

Three methodological tools can be used in a gender equality-focused assessment:

1. Problem analysis
2. Assessment of gender problems
3. Gender analysis

Each of these tools enables us to assess the initial situation in more depth; we can use all or some of them, depending on the thematic area of concern, the type of actors involved, and the information and time available for the assessment process.

Problem analysis

A problem is a situation in which the outcomes are unsatisfactory for an individual, an authority, a specific organization or a population group at any given time. The analysis can begin with an idea, a need or a goal, but the important point is to understand whether it causes dissatisfaction for an individual or a group.

Carucci, Flavio. (2003). Problem-based strategic planning: a participatory approach. Latin American Institute for Social Research (ILDIS). Venezuela. (Spanish only).

At the outset, it is important to <u>differentiate between needs and problems,</u> since they are NOT synonymous; we understand problems as being unsatisfied needs.

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[29] This topic is discussed in Module 7 of the present Handbook.

There are different types of problems:

Table 1
Types of problems by various categories

Based on time	Current
	Potential
Based on the complexity of the problem	Simple
	Complex
Based on the relationship to the objectives	Intermediate
	Final
Based on when the problem appeared	New or emerging
	Pre-existing
Based on gender	Related to condition
	Related to position
Based on how the gender problem is expressed	Gaps
	Inequities
	Barriers

When identifying problems, a distinction should be made between problems related to the CONDITION[30] (of women and men), and those related to the relative POSITION of women and men, in order to ascertain the sources of dissatisfaction or inequality in each area.

PROBLEMS RELATED TO CONDITION:
- Socio-demographic characteristics differentiated by sex.
- Socio-economic status differentiated by sex.
- Socio-political situation differentiated by sex.
- Main problems and demands put forth by their organizations, differentiated by sex.

PROBLEMS RELATED TO POSITION:
- Access to and impact on places of power in the community or geographical areas in which the project operates.
- Leadership and levels of women and men within organizations.
- Access to and control over productive resources.
- Access to ownership of the means of production, by sex.
- Conditions for the exercise of women's human rights and protection of their personal safety.
- Division of work by sex, and social value of women's and men's work.
- Distribution of domestic responsibilities, differentiated by sex.
- Personal, family, institutional and community conditions for men's and women's self-determination.
- Social, legal or institutional regulations.

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[30] We shall adopt Kate Young's distinction in her article: "Thoughts on how to address women's needs". We understand a woman's **condition** as her current material status: whether she is poor, lacks education and training, her workload, her lack of access to modern technology, and so on. By **position**, we shall understand the relative place that she occupies in a hierarchical society: the jobs she holds, the roles she plays, the resources she controls, etc.

What is an assessment of gender problems?

An assessment of gender problems seeks to discover whether there are possible inequalities, inequities or discrimination based on sex and on the attributes and characteristics that socially and culturally have been assigned to men and women, that is, on gender relations as defined by society. This assessment therefore means observing and analyzing **GENDER GAPS**, and **GENDER CONSIDERATIONS**, which some writers classify further into gender inequities and gender barriers, as we shall see later.

A gender assessment helps us to understand women's and men's starting points in the area we shall be analyzing, and to identify the structures and processes (legislation, social and political institutions, socialization practices and policies) that may have an impact on the inequity, discrimination or subordination of different social groups, including women.

This assessment will allow us to:

- Gain a better understanding of the gender dimensions of the issues and areas in which we are working.
- Promote gender equality and equity in a coordinated way throughout the various programs and projects that are carried out.
- Identify barriers or obstacles to the participation of women in development processes.
- Find better strategies and solutions to the different needs of men and women.
- Empower women and men in those areas in which they are at a disadvantage vis-à-vis the other sex.

In order to conduct a gender analysis, it is necessary to:

- Have available information disaggregated by sex (See Module 7 of this Handbook).
- Analyze the information from a gender perspective. It is not enough to know how many men and how many women are affected by a problem; rather, we must first ask whether there is any inequality present, how great it is, and then ask about the causes of that inequality.
- Involve program and project beneficiaries in the analysis of problems.
- Consider the interests and needs of men and women in a differentiated way and, if necessary, look at different groups of men and women (of different ages, socio-economic levels, race, ethnic group, and so forth).

What should we assess?

Gender assessment may look at different angles of a problem situation:
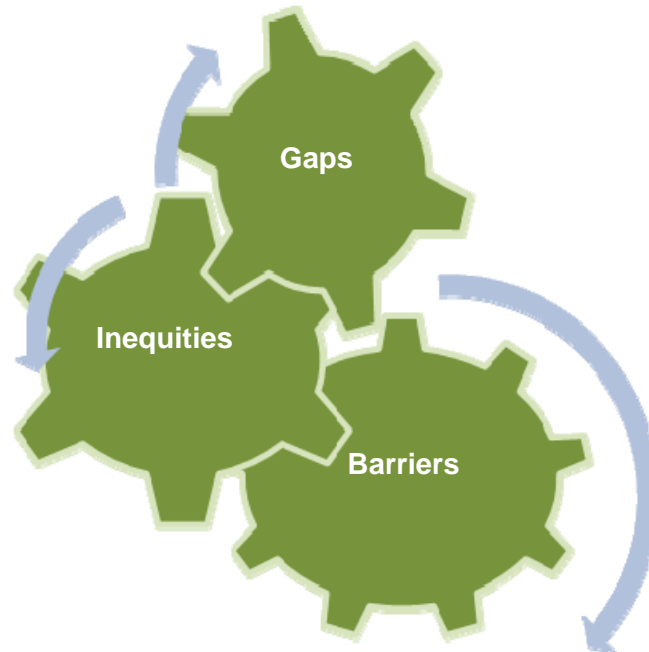
a) *Gender gaps*: We look first at the disparities among project beneficiaries, by sex. Gender gaps are unequal patterns of access to, participation in and/or control by women and men over the resources, services, opportunities and benefits of development. They may be structural or may be a function of gender. They can reinforce unequal power relationships between women and men, or between groups within each sex.

For example: A problem that affects men and women in the region is the gender gap in access to elected public office. Inter-Parliamentary Union data show that the situation in the Americas is the following:

Table 2
Percentage of Women in the Parliaments/Congresses of the Americas

Lower House or single Chamber	Upper House or Senate	Both Houses
22.7%	22.6%	22.7%

Source: Inter-Parliamentary Union (IPU).
Access at: http://www.ipu.org/wmn-e/world.htm

This table shows a significant gender gap in women's participation in politics, and the causes and effects of this gap must therefore be identified.

Another example: we may include other dimensions of gender differences, such as the relative status of women and men by ethnic group and urban/rural situation. Below are data from the Human Development Index calculated for different socio-demographic and ethnic conditions in Chile for 2002.

Graph 1.
HDI Distribution in Chile (2002) by ethnicity, urban/rural and sex.
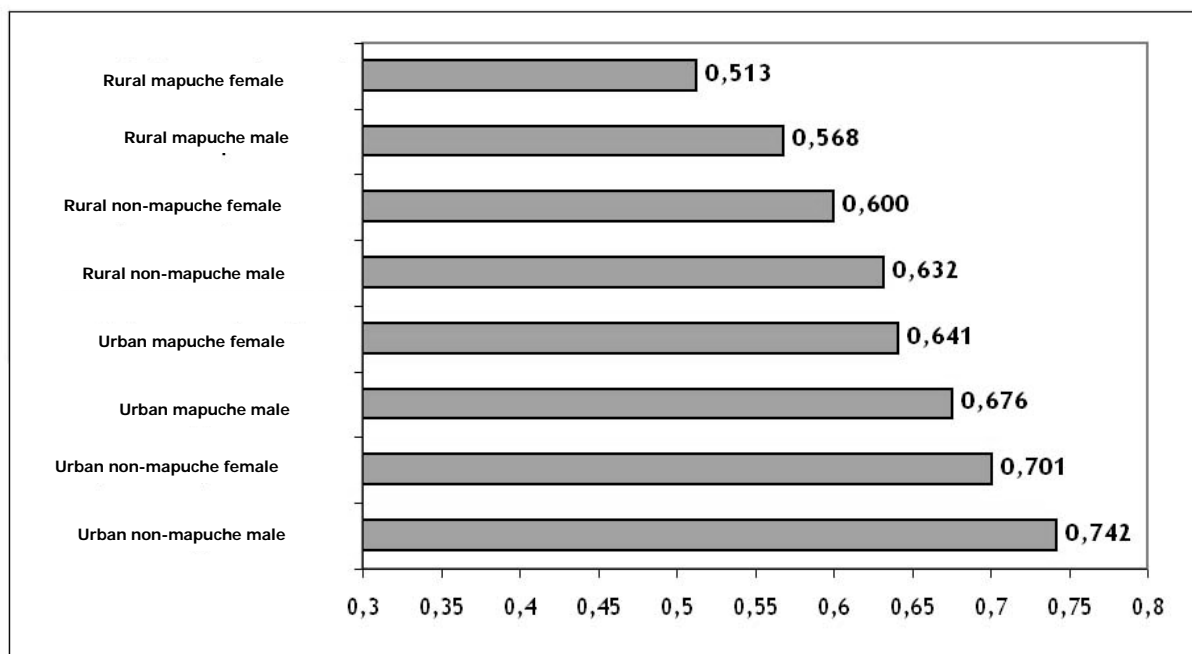
Fuente: Universidad de La Frontera (UFRO) y Programa de Naciones Unidas para el Desarrollo (PNUD Chile)

Listed below are the principal labor market gaps identified by the ILO in the nineties in Latin America (2006), by gender:

Principal positive aspects:

- The gap in labor force participation between men and women narrowed.
- The gap in labor force participation between poor women and other women also narrowed.
- A moderate reduction in income gap.
- A moderate reduction in work in the informal economy: for each new 100 female jobs, 54 were created in the informal economy, while for men, that figure was 70.

Principal negative aspects:

- A significant increase in unemployment among women as a whole, with particular impact on poorest women.
- The unemployment gap between men and women widens.
- The income gap between men and women educated to a post-secondary level continues to be wide.
- The gap between women working in the informal economy and the total female workforce is higher than for men, and has increased.
- Women's lack of social protection in the region is at a high level with respect to men.
- A slight decrease in the percentage of women working part time, and an increase in very short work days (up to 20 hours per week) and in very long work days (49 hours or more per week).

b) Gender inequities:

Gender inequities are unfair situations that are based on gender, but that could be avoided. For example, violence against women, based on a situation of subordination and underestimation of women by men and by the sex-gender system, creates a significant problem for the victims themselves and for society as a whole.

Continuing with the previous workplace example, the following gender inequities may be found (ILO), 2006):

- Half of all occupations are sexually stereotyped; women working in such jobs receive the lowest wages and receive less social security protection.
- People are increasingly migrating, legally or illegally, in search of work. Female migrant workers are among the most vulnerable and exposed to exploitation and abuse.
- International trafficking in women and children is one of the most serious and most rapidly growing problems of our day.

c) Gender barriers:

Gender barriers are issues that have an impact on the problem and that may affect solutions to it. These limitations and barriers may be understood as a set of values, beliefs, expectations, and norms that bear on the distribution of power and prestige in relations between men and women in a particular community and that discourage or stigmatize behaviors and values that would make for a social change in gender relations. These barriers may include:

- **Economic** (lack of resources to take action)
- **Cultural** (deep-rooted beliefs that limit access to goods and products offered by the service)
- **Organizational** (absence of institutional mechanisms for promoting gender equity)
- **Legal** (when laws restrict the possibility of making the changes needed to move forward towards equity between men and women)

For example: Continuing with the problem of access to elected positions, barriers might include, inter alia: political parties' resistance to including women; women's resources for running as candidates and conducting election campaigns are fewer; there are no quota laws.

Another example: In most countries, the law makes the man the head of the household, which allows him to administer both his own property and the property of his wife, thereby curtailing married women's economic independence.

The areas where studies have shown gender gaps, inequities and barriers are:

a) Lifecycle, recognizing barriers to gender equality and the particular needs of children, adolescents, adults and older people. Requires intervening at key moments in order to promote successful transitions from one stage of life to another, so that gender and poverty inequalities do not build up throughout life.

b) A hierarchical division in organizations and institutions in society, where positions of power are generally in the hands of men.

c) The diversity of family and household structures, which requires that particular attention be paid to common law marriages, female heads-of-household, and single parent households (men or women).

d) Gender difference in the use of time, which means that enjoyment of project benefits may be conditioned by women's and men's unequal engagement in domestic chores, economic activities and other responsibilities.

e) Motherhood and fatherhood, which means that projects need to be adapted to the specific needs of fathers and mothers in accessing project benefits, and encourage responsible parenthood and equal participation in childcare.

f) Productive roles of women, who should be taken into account when designing activities that would expand their economic opportunities, including improvements in productivity and competitiveness.

g) Inequalities in decision-making capacities and use of power, usually on the side of men, which means supporting women's access to decision-making in public and private life, to assure their full participation in and leadership of development.

Some gender problems in the areas in which the OAS works[31]:

1. Women's political citizenship

- Limited political citizenship and under-representation of women in positions of power.
- Exclusion of women from the leadership of political parties and from the top positions on electoral lists.
- Limitations on the right to vote.
- Absence of women's issues from first-generation reforms of State institutions in the region.

2. Poverty and economic and social inequality of women

- Women and girls continue to be disproportionately affected by poverty.
- Economic and social policies on recovery from the economic crisis are not taking into account its unequal impact on women
- Continued restrictions on access to, and use and control of productive and financial resources
- Exclusion of women from decision-making on economic policy and national budgets
- Few opportunities for dialogue among governments, the private sector and civil society to arrive at a consensus on long-term government or State policies.

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[31] For more details on these problems, see the CIM Strategic Plan 2011-2016, pp. 2- 13.

- Women's double or triple workdays, given the unequal distribution of family responsibilities, limit their availability for economic activity and for entering the job market.

3. Multidimensional security

- Women experience violence, robbery, trafficking and other security problems in ways that are different from men.
- Indicators for measuring violent crime generally exclude violence against women.
- By and large, women are excluded from the discussion, formulation and implementation of policies and programs concerning lack of citizen security.

4. Women's human rights

- Physical and domestic violence
- Sexual violence
- Trafficking in persons
- Incest and child abuse
- Armed violence and murder of women

> **Overcoming inequality among women and men, and any other inequality, is a pre-requisite for progress in achieving broad development objectives, by enabling every person to develop his or her human potential with integrity and dignity independently of sex.**

What is a gender analysis?

Preparing a complete assessment means doing a gender analysis[1]. A gender analysis helps describe the relative status and power relationships between women and men in their different spheres of family, work, community and public life. It also shows the constraints and opportunities that women and men in different socio-economic or cultural groups face because of their gender roles. It helps distinguish between those aspects of a problem that affect the entire population-- such as lack of income or market access--from those effects that are different for women and/or men and that may cause disadvantages throughout their lives.

Carrying out a gender analysis means taking the following into account:

1. **Activities**: means looking at the activities of women and men in their daily lives, based on the sexual division of work[32]. Activities that are not usually considered work are thus made visible.

   Analysis of activities helps clarify the consequences of the sexual division of work, and on that basis, identify and plan the impact that a project will have on the workload of men and women.

   Example: if we are preparing an assessment of the participation of men and women in elections, we must look at the activities in which men and women are engaged and that might affect their willingness and availability to vote in elections. Childcare and domestic work, which have socially and culturally been attributed to women, might limit their possibility of going to vote, if they have no one with whom to leave their children, particularly in areas where long distances must be travelled, and therefore a heavy investment of time is required. For men, on the other hand, work such as farming, which is seasonal, might limit their possibility of going to the polls if they are in the midst of sowing or harvesting.

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[32] For a definition of the sexual division of work, see the Glossary.

2. **Access to and control of resources and benefits**: the use and control of decisions on program and project resources and benefits, and the ways in which gender roles affect access and control. Different types of resources and benefits (economic, social, cultural, etc.) should be noted in this analysis.

- **Access**: In societies like ours, it is expected that both women and men will have the chance to obtain and make use of resources (land, food, loans, technology, etc.), and services (education, health, housing, and so on). It is not necessarily the case today that both have the same opportunities of obtaining such resources, because there are different barriers to access depending on gender.

- **Control**: The capacity to take decisions on the use and management of a particular resource. Note that this is a process: first, there is access to a resource; then comes control over the use of that resource, and then the benefit that the resource brings to individuals. A gender differentiation should be made throughout the process to determine where the limitations and gaps lie for each gender.

- **Benefit**: The analysis should consider the appropriation of benefits. Once a resource is accessed and used, it may bring direct and indirect benefits (monetary, material or intangible); the way in which resources are distributed among women and men, short and long term, should be analyzed.

This analysis can help identify the starting point, and plan and evaluate the impact that a program or project may have on resources and benefits.

> *Example: Continuing with the previous example, access to and control over resources and benefits may also limit either sex's participation in elections. For example, women may have <u>access</u> to the resource of time in order to go to vote, but, incredible as it may seem in our day and age, there are still women who do not have <u>control</u> of their time and must ask 'permission' from their spouses to use their time. Again, if they need to travel in order to vote, travel has an economic cost: there are women – and men too—who do not have their own economic resources, or cannot freely use family resources, which they do not control.*

Table 3
Example of a matrix on access to and control of project resources.

| RESOURCES	ACCESS		CONTROL	
	Women	Men	Women	Men
Political				
- Local leadership				
- Education and information				
- Experience in political organizations…..etc.				
Social				
Productive				
Natural				
Time				
…etc.				

Source: Adapted from the Ministry of Foreign Affairs of Spain (2004).

Table 4
Example of a matrix on access to and control of project benefits.

| BENEFITS	ACCESS		CONTROL	
	Women	Men	Women	Men
Project goods and services				
- Credit				
- Technical assistance				
- Technology				
- Inputs				
Project facilities and equipment				
- Offices				
- Buildings				
- Vehicles				
Project benefits				
- Knowledge acquisition				
- Training				
- Goods and in-kind yield				
- Property				
- Political influence				
- ….etc.				

Source: Adapted from the Spanish Ministry of Foreign Affairs (2004).

3. **Identification of practical and strategic gender needs**: differentiated needs of men and women, categorized as practical and strategic needs. In the current context of rights-based public policies, these are thought of as needs that can be satisfied immediately (practical), and rights that are satisfied progressively (strategic).
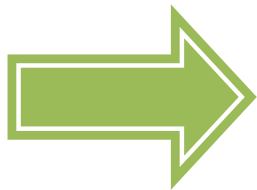
Practical needs are those that seek to improve the quality of life and respond to individuals' basic needs. Practical needs are easily identified, and are generally related to unsatisfactory living conditions and lack of resources. Generally speaking, these needs are not exclusive to women, but rather involve the whole family. Practical needs can be met without changing traditional gender roles.
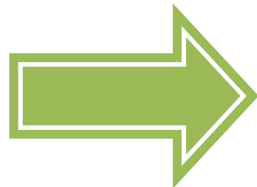
Strategic needs are those that have to do with gender equality questions in a particular society, and that seek a more equitable distribution of resources among women and men in a society. Strategic needs imply demanding an equitable redistribution of roles, responsibilities and power among women and men.

Gender needs vary from one society to another, and over time: what is a practical need in one place (access to higher education, for example) in another place may be a strategic need. In identifying gender

needs, it is therefore necessary to bear in mind cultural, local, regional, age, class, educational and employment differences.

> *For example: in a project on security, women may present needs linked to the education of their children to address violence or care for family members affected by crime. These are practical gender needs, which, while discussed by women, are needs of the family; addressing these needs does not change existing gender relations nor the position of women in society. Similarly, a practical need in the case of men might be to protect their families --something grounded in the gender role traditionally assigned to them. A woman's strategic need might be for support in leaving a situation of domestic violence, since leaving could change her status and position in society. For a man, a strategic need might be treatment for abusive men, to address the couple's unequal power relationship.*

Table 5
Example of a matrix of a gender needs profile[33].

Practical needs		Strategic needs	
Women	Men	Women	Men

Source: Adapted from the Ministry of Foreign Affairs of Spain (2004).

4. **Analysis of influences**: Influences are factors that may affect the status, rights, opportunities, outcomes and impact of programs and projects on men and women. Influences may operate at the macro level (overall context of a country or sector), and/or at the micro level (in a particular area or group); they may be events, facts, norms, values, laws and customs. Similarly, factors may be factors of resistance or of change.

By analyzing influences, we can identify social structures, legal norms, processes and relations that give rise to the disadvantageous position of certain groups in society, and therefore can gear the development action toward changing those structures, processes and relations. They can also determine the sustainability of gender equality in a project over the medium and long term.

> *For example: Influences on a program on violence and crime may be permissive policies on carrying arms; lack of laws addressing violence against women; living in a geographical area where sexual tourism is prevalent; social acceptance of mistreatment of women; lack of public policies dealing with trafficking in persons, and rise in school drop-out and youth unemployment, which may increase the possibility that young people will engage in criminal behavior.*

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[33] A rights-based needs analysis would be linked to rights that can be immediately satisfied (practical needs) and to rights that are met strategically and progressively (strategic needs).

Table 6
Example of influences on a country's legal system

Legal landscape
International law
National Constitution
Domestic laws
Written law
Common law

Key dimensions		
Legislature	**Executive**	**Judiciary**
Drafting of recent laws	Enforcement of laws in the administration	Access to justice
Principle of formal and actual equality	Control of the administration	Court action and judicial response
Principle of non-discrimination on account of sex	Staff training	Legal guarantees
	Gender equality agencies	Training of judges
	National Equal Opportunities Plan	Training of police
Other dimensions		
Affirmative action measures		
Participation of civil society and women's organizations in proposing rules on gender equality		
….etc.		

Source: Adapted from the Ministry of Foreign Affairs of Spain (2004).

Conducting an appropriate **gender analysis** requires looking at traditional and non-traditional methods of collecting information. Traditional methods may include interviews and surveys, and reviews of secondary information (studies, statistics from government institutions and non-governmental organizations). Non-traditional methods may include focus groups, informal conversations, participant observation, etc. Central to this analysis is the participation of different actors and groups linked to the project.

> *The assessment will always be better when it involves entities and individuals who are expert in gender, as well as women or stakeholders themselves (participatory assessment)*

Prioritizing problems

Once the problems have been identified, it may be difficult to prioritize them, or to establish causal relationships among them, as often happens with the problem tree method. Several techniques are available for selecting and prioritizing problems, most of which use priority-setting matrices based on pre-defined criteria. These criteria may vary according to the type of problem or entity being prioritized; however, from a gender perspective, some of the criteria to be considered could include the following[34]:

1. **Population affected**: refers to the number and characteristics of the individuals affected by the problem. For example, violence against women is often said to be a very specific problem that affects a small number of women. However, women represent at least 50% of the population and all are thoroughly affected by the problem. It should also be borne in mind that those affected by gender violence are many more than the direct victims themselves --their families, community organizations, public institutions (health, police, and the justice system) and the institutions where the victims work, their workplace environment.

2. **Governance**: is related to the organization's economic, political and institutional resources, as well as its mandates and legal powers for addressing the problem. An unanticipated difficulty that arose with the creation of national gender equity mechanisms is that other government agencies at times wanted to avoid their responsibility in their own sectors for addressing problems affecting women, saying that a specialized agency already existed for that purpose. Gender mainstreaming efforts are therefore very important, for they mean that all public or government agencies, at different levels and in different sectors, should address gender-related questions and allocate resources for that purpose.

3. **Value of the problem to the organization's policy**: The importance that the organization attaches to the problem, in accordance with its mandates, obligations and competences. The international area is very important here, since international conferences, their Platforms for Action, binding conventions or treaties, resolutions of specialized agencies, declarations and strategic definitions all provide a normative framework that sets priorities and makes certain problems visible as strategic pillars on gender matters. All this can help promote plans inside organizations.

4. **Capacity to succeed in addressing the problem**: The relationship between available or potential resources, and the resources actually required to solve the problem. Also takes into account the institution's competencies and capacities vis-à-vis the size of the problem. Gender prejudice may often be found when assessing women's capacities (especially among the leadership) to address certain problems. In general, women's true capacities for solving particular problems tend to remain invisible or, even when they are patent, tend to be minimized or undervalued. At the same time, when increased capacity for gender analysis is needed, for example, there is a tendency to hire outside experts rather than building capacity among men and women at various levels inside the institution.

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[34] Taken and adapted from the Methodological guide to results-based project planning and evaluation, by Jorge González. (2006). Municipal Publications Institute, City of Caracas, Venezuela (Spanish only).

5. **Cost of delay**: Future cost to be paid if the problem is not addressed and if the solution to it is postponed. Society is more and more aware of gender problems, and governments today must increasingly pay the political cost of not addressing specific situations that cause or reproduce gender inequalities.

These criteria are merely an illustration, and may be used in whole or in part, or else others more pertinent to the particular situation can be found. What is important is to make them explicit, so as to seek out those gender biases or constraints that make prioritizing difficult when finding solutions.

CHECKLIST FOR INCLUSION OF A GENDER APPROACH IN THE ASSESSMENT:

When doing the assessment, it will be useful to ask the following questions that will ensure that a gender focus is in fact being used to identify and analyze problems:

- What is the main situation that we seek to change? Does it affect the condition of women/men? Does it affect the position of women/men? Does it affect relations between women/men?

- Have men and women participated equally in identifying the main problem?

- How do men and women experience the problem?

- Have the gender roles of men and women been identified?

- How does the problem affect the productive and reproductive activities of men and women?

- What are the influences associated with the problem that prevent and/or enable the empowerment of women?

- Have the motives of women carrying out productive activities and/or those interested in beginning a productive activity been identified?

- Have women's and men's social capital vis-à-vis the project been identified?

- Does the institution have the capacity to conduct an appropriate gender analysis before carrying out the project?

- Is there parity in the project staff?

Glossary

GENDER ANALYSIS

Gender analysis is a systematic way of examining the different roles that men and women play in development, and the different impacts that development has on women and men. In essence, gender analysis asks "who", that is, who does what, who has access to and control over what, and who benefits from what? This will identify the different relations among individuals of both sexes and different age groups, social classes, religions, ethnic groups, races and castes. Gender analysis also means breaking down and analyzing the information by sex, particularly concerning the differences between all population groups and relevant socio-economic and cultural factors.

GENDER GAPS

Gender gaps are unequal patterns of access, participation and control by women and men over the resources, services, opportunities and benefits of development. They may be structural or may be a function of gender; they may reinforce unequal power relationships between women and men, or between groups within each sex.

SOCIAL CAPITAL

Social capital is considered the variable measuring social collaboration between different groups of human collective and individual use of the opportunities arising from this, from three main sources: mutual trust, effective norms and social networks.

GENDER CONSIDERATIONS

Gender considerations describe the relative position and relations between men and women in their different spheres of interaction: family, work, community and public life. They allow us to note the constraints and opportunities that women and men of different socio-economic or cultural groups have placed on them by their gender roles.

SEXUAL DIVISION OF WORK

The division of productive and reproductive work based on the different roles assigned to men and women in each society. Traditionally, it has been women who have cared for their families and done the housework – activities that are defined as "reproductive" work. On the other hand, men's central role has been linked to economic or "productive" activity, as "providers" of the family. In market economies, value is attached only to productive work, since it is paid work. Reproductive work is unpaid and seen as "natural", and is therefore undervalued. Given the differences in the tangible and intangible compensation paid to the roles and tasks assigned to each sex, the sexual division of work is hierarchical, leaving women in a subordinate position to men.

PRACTICAL GENDER NEEDS

Seek to improve individuals' quality of life and respond to their basic needs. Are easily identified, and are generally related to unsatisfactory living conditions and lack of resources.

STRATEGIC GENDER NEEDS

Refer to questions of gender equality in a given society; seek a more equitable distribution of resources and power among women and men.

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Module 6
Identification of gender equality-based objectives and alternatives

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To understand and use tools to identify and analyze gender equality objectives in projects

Once the principal gender inequities and gaps have been assessed, along with the barriers and constraints on addressing them, the objectives and alternatives for action should be decided on, in order to determine how those problems will be overcome.

Objectives

The objectives set out the *change* it is hoped to make in a given initial situation, and the goal it is hoped to achieve via the intervention. The key questions to be asked at the time the objectives are drafted are: what is it we want to achieve? Or, for what purpose do we intervene in this initial situation?

It is often the case that in defining objectives, one is clear about what one wants to do – for example, provide training, grant loans, build social infrastructure, and so forth--but it may not be clear why these actions will be taken.

Objectives are not activities or tasks; as in the previous example, they should show the results that are expected as a result of the project, as well as the commitments made to changing a given situation; both will be used in the evaluation and in subsequent adjustments to project management. The objectives should clearly state why the intervention will take place and what changes are expected. For example, for the actions noted earlier, the objectives might be developing management skills in the community, increasing the income of a micro-business, or facilitating community activities.

From a gender perspective, objectives should be seen as a more general goal of equality and equity among men and women, taking into account the needs and interests of both.

The objectives should be directly related to the stakeholder analysis and to the definition of the problems identified in the assessment, since it is there that the needs to be addressed are identified and provide the basis for designing action strategies. Bear in mind that the proposed objectives should seek to make changes in the gender gaps and inequities that have been identified, and not merely to change the organization's culture (although this is also important and necessary).

> What it is hoped to achieve or change should be consistent with the analysis performed in the assessment

In drafting gender-sensitive objectives, it is not enough explicitly to include men and women, although in many cases, this may be necessary and may represent an advance in and of itself.

It is often taken for granted that if the objective identifies the population as a whole, this automatically means that men and women and their respective needs are also considered; much of the time, this is not the case. What is needed is that the objectives should truly consider the needs of men and women, as well as the gender needs, roles and relationships that are linked to the program or project topic.

CHECKLIST FOR INCLUDING GENDER EQUALITY OBJECTIVES IN A PROJECT

To ensure that the stated objectives truly incorporate a gender focus, the following questions should be answered:

- Is there a gender equality-based theory of change that will support the change hypothesis expressed in the project objectives?

- Does the project have an explicit gender equality objective?

- Have the beneficiaries of the project been appropriately identified?

- Are gender relations or a change in gender relations considered, or could they be considered, in relation to the issue addressed in the proposed objectives?

- Are the objectives clear about the change that is expected to occur in gender gaps, inequities and/or barriers, as a result of the project?

- Do the objectives affect the <u>condition</u> of women and men, the <u>position</u> of women and men, and/or <u>gender relationships</u>?

- Can any of the objectives reduce gender gaps and improve men and women's access to opportunities, services, goods and resources in accordance with the inequities detected in a particular sector?

Table 1
Examples of project objectives

Objective WITHOUT a gender focus	Objectives WITH a gender focus
Improve access to justice through community participation mechanisms.	*Improve men's and women's access to justice through citizen participation mechanisms that take account of the most disadvantaged groups.*
Increase the participation of civil society organizations in the work and activities of the OAS.	*Increase the participation of civil society organizations in the work and activities of the OAS, principally in the context of the Convention of Belém do Pará.*
Develop and/or strengthen the leadership capacities of government and non-governmental professionals for discussion, consensus building and design of public policies.	*Develop and/or strengthen the leadership capacities of government and non-governmental professionals, as a means of promoting gender equality in the discussion, consensus building and design of public policies.*
Contribute to participation in politics and elections in the OAS member states.	*Contribute to the full and equal participation of men and women in politics and elections in the OAS member states.*

Source: Developed by the author

Depending on the type of program or project, there may be two options for looking at gender objectives; we give examples below:

Gender equality is the principal objective of the project	or	Gender equality is one of the objectives of the project (at the output level, for example)
Promote the full and equal participation of women in the country's political life and in decision-making at all levels.		Leadership training for 500 young women in urban areas of the country.
Strengthen the OAS electoral observation capacity by incorporating a gender perspective.		Develop a gender-sensitive electoral observation methodology
Promote the full and equal participation of women in the country's political life.		Acquiring knowledge, tools, abilities and skills to contribute to the political impact of indigenous women in areas where displaced persons are settled.

If gender equality objectives were not identified at the beginning of a project, certain steps may be taken:

- **Use new participatory methodologies.** Bear in mind that whenever stakeholders are involved from the beginning of the project, the more chances for project success.

- **Develop capacities and raise awareness about gender** among those involved in project execution.

- **Open up activities and responsibilities for men and women,** and organize them in such a way that women have the possibility of taking part in the same way as men, and so forth.

- **Include gender tools in the project monitoring instruments.**

A gender-equality approach to the analysis of alternatives

With the objectives defined, alternatives for achieving them must also be identified. It is important to select the alternative that is felt to be *optimal.* There are various ways of selecting alternatives or options. These are normally based on a set of different criteria related to the type of change anticipated as a result of the project. The selection will generally be made by comparing the various alternatives.

We have already seen how the problem analysis process requires us to prioritize problems according to certain criteria[35], such as:

- **Population affected**

- **Governance**

- **Value of the problem to the organization's policy**

- **Capacity to succeed in addressing it**

- **The cost of delay**

Additional criteria may be used to analyze alternatives or options:

- **Resources needed and available for implementation** (financial, material, human)

- **Time needed and available**

- **Socio-political conditions** (means assessing whether the socio-cultural changes resulting from the project will be desired or assimilated by the beneficiaries, and whether existing ideologies and policies offer a setting in which the alternative can be appropriately carried out).

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[35] See Module 5 on Gender Assessments for more details.

From the gender equality perspective, two additional criteria should be included in order to identify:

a. *The impact on men and women*: the possibility of improving the situation of men and women affected by the problem identified. While it is understood that the program or project will move in that direction, the comparison of alternatives should identify which will have a greater impact.

> *For example: if the problem is a gap in women's access to elected positions, we would have to consider whether promoting quota laws would have greater or lesser impact than training and sensitizing political parties to encourage them to include women in their lists of candidates.*

b. *Factors external to the project*: that is, unplanned effects, not directly sought through the project, that may have a positive or negative effect on men and women.

> *For example, most of the participants in a training project for volunteers who will be trained during working hours will certainly be women who do not do paid work. A negative external factor might be that these women become over-worked, which would limit their possibility of using their free time for paid work.*

> *Similarly, in a project to expand the capacity of the civil registry office to register citizens, a positive external factor might be that women whose identity is registered will have access to loans or other tools of production.*

Some examples of matrices that can be used with the communities where the project will be carried out to prioritize alternatives for change:

Table 2
Example of a matrix for prioritizing alternatives

Objectives identified	Criteria and scoring (1 to 5, where 1 is the lowest and 5 is the highest)					
	Positive impact on women	Positive impact on men	Low cost and high results	Engagement of the community or organization	Demand from groups	Score
Prevent maternal mortality						
Eradicate family violence						
Improve health services						
Provide literacy training						
Provide identity documents for everyone						

Source: Author's adaptation of Chung, Carmela. (2007) Handbook for the design of gender-focused local public policies. APODER-COSUDE and REMURPE. Lima, Peru. (p. 23)

Table 3
Example of a ballot sheet for prioritizing objectives

Town of Punta Lobos	
Mark three objectives that need to be achieved to improve the lives of men and women in our community and to which the city should pay particular attention and commit resources over the next three years	
Objectives	**Score**
1 Prevent maternal mortality	
2 Eradicate family violence	
3 Improve health services	
4 Provide literacy training	
5 Provide identity documents for everyone	

Source: Author's adaptation, based on Chung, Carmela. (2007)) Handbook for the design of gender-focused local public policies. APODER-COSUDE and REMURPE. Lima, Peru. (p. 23)

Glossary

GENDER EQUALITY

Equivalence in value and hierarchy of men's and women's possibilities, opportunities, rights, and access to and control of resources. Is an acknowledgement of each person as a holder of rights.

GENDER EQUITY

By gender equity, we understand the impartial treatment of women and men according to their respective needs, whether equitable or differentiated treatment that is still equitable. Refers to the fair distribution of resources, responsibilities, tasks, etc. among men and women, while respecting their differences. In the development field, achieving gender equity often requires taking specific measures to compensate for or mitigate the historical and social disadvantages that have held women back.

GENDER RELATIONS

Examines the social relationships between men, women and children that determine the way in which power is distributed between them or among them, and how that power translates into different positions in society. Relations between genders may vary depending on other social relations such as class, race, ethnic group, etc. They have a major effect on the way in which a man or a woman experiences processes and institutions, such as lawsuits and courts, and how they interact with other people in those institutions.

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Module 7
Sources of information on gender matters

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To understand the different sources of data and information on gender matters, to help in the assessment that will be done in the project identification phase, and in project monitoring and evaluation

Introduction

A central issue in the proper planning, execution and evaluation of gender-sensitive projects is access to information. Even though a significant number of studies and research on gender issues have been produced in recent decades, many are still restricted to academia and are not sufficiently discussed in policy circles. Nonetheless, governments are making efforts to produce, maintain and disseminate important information on gender issues, as we shall show in the following pages.

Most sources of information are statistics, indicators and databases, which have shed light on a large number of social, political, economic, and cultural issues that have gender at their core and basis. However, other sources of information are advancing our knowledge, such as findings of studies on normative and qualitative aspects of different gender-related topics, as well as *online* training experiences. Their fundamental importance has been to show that advances have been made on the issue of gender, but also that progress has stalled or even regressed.

Most sources of information are either statistical databases or qualitative information collected from censuses, specific surveys in the countries (by government agencies or non-governmental organizations) and administrative records from different public agencies.

The information shown in the following pages may be used at different moments in the project cycle: in the assessment of problems, the design of indicators, the construction of baselines, and project monitoring and evaluation.

Information on international normative frameworks

Information on the signature and ratification of inter-American treaties is found on the OAS web site under Multilateral Treaties:
http://www.oas.org/DIL/treaties_subject.htm

Information on the signature and ratification of other international treaties is found on the United Nations web site, UN Treaty Collection:
http://treaties.un.org/pages/ParticipationStatus.aspx

Some important Conventions:

Inter-American Convention on the Granting of Civil Rights to Women (1948)
http://www.oas.org/juridico/english/treaties/a-45.html

Inter-American Convention on the Granting of Political Rights to Women (1948)
http://www.oas.org/juridico/english/treaties/a-44.html

Inter-American Convention on the Prevention, Punishment and Eradication of Violence against Women, Convention de Belém do Pará (1994)
http://www.oas.org/juridico/english/treaties/a-61.html

International Covenant on Civil and Political Rights (1966)
http://treaties.un.org/pages/ViewDetails.aspx?src=TREATY&mtdsg_no=IV-4&chapter=4&lang=en

Convention on the Political Rights of Women (1953)
http://treaties.un.org/pages/ViewDetails.aspx?src=TREATY&mtdsg_no=XVI-1&chapter=16&lang=en

Convention on the Nationality of Married Women (1957)
http://treaties.un.org/pages/ViewDetailsIII.aspx?&src=TREATY&mtdsg_no=XVI~2&chapter=16&Temp=mtdsg3&lang=en

Convention on the Elimination of all forms of Discrimination against Women (CEDAW) (1979)
http://treaties.un.org/Pages/ViewDetails.aspx?src=TREATY&mtdsg_no=IV-8&chapter=4&lang=en

Information on gender matters

1. Gender statistics

In the overall field of statistics, gender statistics are a new area. Gender statistics are those sources of information that, beginning with the conceptual design and throughout all phases of the data-building process, seek rigorously to collect information on the specifics of the situation of women in society vis-à-vis men, and on the issues where they are closer together or further apart in a variety of social settings. Their purpose is to eliminate gender stereotypes, and serve as input for the formulation of policies of equity and equality among women and men. An essential pre-condition is to look at sex differences in traditional government statistics.

> Gender statistics seek to disaggregate data by sex, and also to ensure that the data be collected and presented in such as way as to reflect the conditions and contributions of women and men in society, as well as their needs and specific problems. From this standpoint, gender statistics are a tool for promoting equality.
>
> ECLAC (2006). "Technical Assistance Handbook on the Production and Use of Gender Indicators". Women and Development Unit. Chile. (Spanish only).

Relationship between statistics and indicators

Different tools are used to collect, analyze, interpret, evaluate and measure the impact of information; generally, they complement each other, as in the case of "statistics and indicators". A brief description of each is given below, to illustrate the link between the two techniques.

Statistics	Indicators
Statistics are figures, or numerical information that answers the questions: how much, and how many? Statistics are generally shown as numbers or proportions, in charts and graphs.	Indicators may be: (a) statistical information on ratio variables (that measure change in quantitative terms, such as number, percentages, frequency, rate, proportion, variance, etc.), or else (b) qualitative indicators that seek to clarify a problem or answer a economic, demographic or social question (reflecting judgments, opinions, competences, perceptions, quality, level of understanding or attitudes. May be expressed in terms of satisfaction, perception, applicability, etc.).

Methodology for using gender statistics

- A gender equality focus must be present from the time of planning through to the publication of the results.
- The statistical instruments should cover information that illustrates the roles of women and men in society. Example: questionnaires should include questions and response categories that show what the lives of women and men are like.
- Train field staff and analysis personnel to avoid personal sexist biases.
- All information output should be disaggregated by sex, and should calculate the magnitude of the difference between the two, in order to examine the gaps.
- The most commonly used sources of information for gathering data are population and housing censuses, household surveys, and administrative records.

Usefulness of gender statistics

Gender statistics enable us to:
- Sensitize public opinion and help make gender problems visible, in order to promote change in roles and stereotypes that are deep-rooted in society.
- Sensitize the authorities to gender inequalities.
- Formulate national plans and policies to have a gender equality perspective.
- Inspire measures for change.
- Appropriately monitor and evaluate public policies.
- Bring accountability and transparency to the actions of public agencies.
- Design and formulate projects in areas critical to the countries' development.

Limitations of traditional statistics

- They do not reflect gender issues that are being discussed in society, and therefore do not cover subjects of interest to all the population.
- Data collection instruments and analysis of the information do not consider gender issues at all stages of the process.
- Fieldwork and data processing have gender biases.
- Decision-making is incomplete, since it does not take into account the needs and specificities of women and men.

Bear in mind that information is disaggregated by sex and is analyzed from a gender perspective. Since gender differentiation is social and cultural, what can be counted or put into numbers is the differentiation between men and women, but not the cultural difference between masculine and feminine.

2. Gender indicators

Gender indicators fulfill two functions: (a) they are instruments for social analysis, and help us to explore the relationship between men's and women's life situation, and social, political, economic and cultural changes; and (b) they are social planning tools, since they are useful in identifying gender problems (gaps, inequities, barriers), defining objectives and setting development goals in the projects.

Indicators are also used in several stages in the project cycle, from the diagnostic and problem identification stage, the formulation stage, where indicators are identified, to the collection of baseline data needed for monitoring and evaluation of the project.

Certainly, it is in this field where there has been more progress in the last decade. A significant number of indicators for a wide variety of issues and emerging areas can be found on the web, including indicators related to the classic gender disparity areas. Some of these indicators are listed below:

2.1. Human Development Indices

One of the tools most often used to measure and exercise pressure on countries to comply with international agreements are the Human Development Indices, created by the United Nations Development Program (UNDP) in the early nineties. The Human Development reports, which show HDI as cross-country comparisons in a world ranking, have become a kind of barometer to measure countries' development in various areas.

These indices are the following:

HDI   Human Development Index.

Includes measures of per capita GDP, life expectancy at birth, adult illiteracy rate, and combined school enrollment in primary, secondary and tertiary education.

GII   Gender Inequality Index.

This index is structured similarly to the HDI, but adjusts a country's average progress for inequalities between men and women in each of its variables and dimensions: HEALTH, EDUCATION and INCOME.

a)   Long and healthy life: Life expectancy at birth
b)   Access to knowledge: rate of adult illiteracy and rate of combined primary, secondary and tertiary school enrollment
c)   Decent standard of living: Estimated median income.

The GII falls when the overall level of advancement of men and women stalls, or when the gap between the advancement of men and women widens[36].

Further information on the construction of the index and additional data can be found at the following link: http://hdr.undp.org/en/statistics/gii/

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[36] UNDP (1995). Human Development Report, Mexico.

GEM ➡ **Gender Empowerment Measure**.

This index shows the participation of women in different decision-making arenas (political, economic and income share). It gives only a partial view, in that it does not address other places where control is in play, such as the family and the community. The GEM variables are:

   a) Opportunities for and participation in political/policy decision-making: measured by the proportion of parliamentary seats held by female legislators, and women in senior government and executive positions.
   b) Access to professional opportunities and participation in economic decision-making: measured by the proportion of women in professional and technical positions.
   c) Control over economic resources: estimation of income received by men and women.

UNDP has produced some human development reports specifically on gender in Latin America:

Guatemala (2002). Report on Human Development, Women and Health.
El Salvador (2003). Human Development Report on Globalization from a Gender Perspective.
Bolivia (2003). National Report on Human Development and Gender in Bolivia.
Chile (2010). Human Development Report. Gender: the challenges of equality.

> **For HDI, GII and GEM indicator data by year, see:**
>
> **http://hdr.undp.org/en/reports/global/hdr2010/**

2.2.   MDG indicators

In September 2000, 189 world leaders met at the United Nations and adopted the Millennium Declaration, a commitment to work together and build a more secure, more prosperous and more equitable world. The Declaration gave rise to eight quantifiable, time-bound targets to be achieved by 2015, known as the Millennium Development Goals (MDGs). Ten years later, world leaders met again and pointed to undeniable progress in many countries towards achieving some of the Millennium Development Goals. However, the problems continue and oblige governments to take more drastic measures in designing national development policies and strategies.

The MDG indicators are summarized below:

Objective 1 Eradicate extreme poverty and hunger

- Reduce by half the proportion of people living on less than a dollar a day
- Reduce by half the proportion of people who suffer from hunger

Objective 2 Achieve universal primary education

- Ensure that all boys and girls complete a full course of primary schooling.

Objective 3 Promote gender equality and empower women

- Eliminate gender disparity in primary and secondary education preferably by 2005, and at all levels by 2015.

Objective 4 Reduce child mortality

- Reduce by two thirds the mortality rate among children under five.

Objective 5 Improve maternal health

- Reduce by three quarters the maternal mortality ratio

Objective 6 Combat HIV/AIDS, malaria and other diseases

- Halt and begin to reverse the spread of HIV/AIDS
- Halt and begin to reverse the incidence of malaria and other major diseases

Objective 7 Ensure environmental sustainability

- Integrate the principles of sustainable development into country policies and programs; reverse loss of environmental resources
- Reduce by half the proportion of people without sustainable access to safe drinking water and basic sanitation
- Achieve significant improvement in lives of at least 100 million slum dwellers, by 2020

Objective 8 Develop a Global Partnership for Development

- Develop further an open, rule-based, predictable, non-discriminatory trading and financial system
- Address the special needs of the least developed countries, land-locked developing countries and small island developing States
- Deal comprehensively with the debt problems of developing countries.
- In cooperation with developing countries, develop and put into effect strategies to provide decent productive work for young people.
- In cooperation with the private sector, make available the benefits of new technologies, especially information and communications

Updated information on countries' progress towards the MDGs can be found at: http://www.mdgmonitor.org/

For more information on MDGs and and case studies, see: http://www.undp.org/mdg/progress.shtml

2.3.   Global Gender Gap - GGG

The World Economic Forum is an independent not-for-profit foundation, known for its annual meeting in Davos, Switzerland. International business and political leaders come to the Forum to examine the problems that the world is facing. In addition to its meetings, the Forum produces a series of research reports, and engages its members in specific initiatives in different sectors. Its Global Gender Gap reports have been produced since 2006; they give detailed profiles and a new view of the economic, legal and social aspects of gender gaps in each country. The GGG measures the gaps between genders in four critical areas of inequality among men and women:

1) Economic participation and opportunity outcomes on salaries, participation levels and access to high-skilled employment

2) Educational attainment - outcomes on access to basic and higher level education

3) Political empowerment - outcomes on representation in decision-making structures

4) Health and survival - outcomes on life expectancy and sex ratio.

> **More information on the Global Gender Gap can be found on the World Economic Forum website at:**
> **http://www.weforum.org/issues/global-gender-gap**

2.4.   Observatory on Gender Equality in Latin America and the Caribbean

At the tenth Regional Conference on Women in Latin America and the Caribbean held in Quito, Ecuador (2007), the member states of ECLAC requested that an observatory on gender equality be set up. The countries recognized parity as "a driving force of democracy, the purpose of which is to achieve equality in the exercise of power, decision-making, the machinery of social and political participation and representation, family relations in different types of families, and social, economic, political and cultural relations; it is a goal for eradicating the structural exclusion of women". (Consensus of Quito)

ECLAC's Gender Affairs Division became the Secretariat of the Observatory, responsible for implementing this initiative and coordinating the efforts of other United Nations agencies and stakeholder cooperation organizations, as well as Women's Advancement Mechanisms and national statistics institutes or agencies in the countries of the region.

> **More information on the indicators of the ECLAC observatory can be found at the following link:**
> **http://www.eclac.cl/oig/**

2.5. National Observatories

Argentina	Gender Equity Observatory http://www.buenosaires.gov.ar/areas/des_social/mujer/observatorio_genero/index.php	
Argentina	Observatory on Discrimination on Radio and Television http://www.obserdiscriminacion.gov.ar/web/?cat=1	
Brazil	Brazilian Observatory on Gender Equality http://www.observatoriodegenero.gov.br/	
Colombia	Observatory on Gender Issues http://equidad.presidencia.gov.co/Es/OAG/Paginas/OAG.aspx	
Mexico	Observatory on Gender and Poverty http://ogp.colmex.mx/	
Mexico	System of Gender Indicators (INMUJERES) http://estadistica.inmujeres.gob.mx/formas/index.php	
Mexico	Observatory on the Political Advancement of Women (English summary at: http://cms.inmujeres.gob.mx/english.html	
Mexico	Citizens' observatory for gender equity in the communications media http://www.observatorioequidadmedios.org/index.php?option=com_content&view=article&id=2&Itemid=8	
Subregional	Observatory on Justice and Gender http://fundacionjusticiaygenero.com/index.php?option=com_content&view=article&id=50&Itemid=37	
Venezuela	Bolivarian Observatory on Gender http://www.minmujer.gob.ve/	

2.6. Gender Equity Index (GEI) – Social Watch

The Gender Equity Index was developed in 2007 by the international NGO, Social Watch, in order to make gender inequities more visible and to monitor their evolution in different countries throughout the world. The GEI is based on available information that can be compared internationally, and classifies and ranks countries according to selected gender inequity indicators in three dimensions: education, economic participation and empowerment.

For 2009, the index shows that the gender gap is not narrowing in most countries, and that most countries that do show progress are those that were already comparatively better. The distance between the countries and regions in the relatively better and worse situations has widened in the recent years. In education and economic activity, the situation of women has improved overall, but when it comes to empowerment, some 15% of countries have fallen back over the past year, to such a serious extent that that the average global value of this indicator fell from 35% in 2008 to 34.5% in 2009.

This is an interesting way of presenting the data, which cover all countries of the world.

> **More information on the Gender Equity Index (GEI) can be found at:**
> **http://www.socialwatch.org/es/node/11568**

2.7. Women in the Legislature – Inter-Parliamentary Union

Data on women in legislatures around the world can be found on the Inter-Parliamentary Union's web site. The information is updated on a regular basis using information provided by national Parliaments. One hundred and eighty-six countries are ranked by decreasing percentage of women in the Lower House or Single Chamber. Comparative data on the world and regional averages can also be found, along with data on the two regional parliaments elected by direct suffrage. The web site also offers users the possibility of using the PARLINE database to view detailed results of parliamentary elections in each country.

> **More information on women in parliament can be found at:**
> **http://www.ipu.org/wmn-e/classif.htm**

3. Databases

Various databases provide information on the different issues that the OAS addresses. The principal databases are given below, with an indication of the type of information they contain – recognizing that issues overlap and that some websites give information on more than one topic:

Civil and political rights and security

http://www.oas.org/dps
Web page of the Secretariat for Multidimensional Security of the OAS, Inter-American Observatory on Security, which reports on crime and violence in the hemisphere. Includes information from member states, Secretariat publications, links, etc. The breakdown of the information by sex varies according to source and national reports.

http://www.ipu.org
Web site of the Inter-Parliamentary Union. Provides information on women in politics, and national, regional and world data. Also has background on other topics related to gender discrimination, such as violence. Other topics of interest to the Inter-Parliamentary Union are: representative democracy; international peace and security; sustainable development, human and humanitarian rights, education, science and culture.

http://www.idea.int
The International Institute for Democracy and Electoral Assistance (IDEA) has a major database on different areas of democracy and elections throughout the world.

http://info.worldbank.org/governance/wgi/index.asp
The Worldwide Governance Indicators (WGI) are found on this World Bank site. The WGI bring together aggregate and individual governance indicators for 213 economies for the period 1996-2009. They look at six dimensions of governance: Voice and Accountability, Political Stability and Absence of Violence, Government Effectiveness, Regulatory Quality, Rule of Law, and Control of Corruption.

http://www.undp.org/women
UNDP page on gender equality and empowerment of women, focusing on its four principal areas of work: poverty reduction, democratic governance, crisis prevention and reconstruction, and environment and sustainable development.

http://www.observatorioviolencia.org
Data base of the United Nations General Secretariat on violence against women. The main sources of information for the database are the responses of UN member states to a September 2008 questionnaire on violence against women, which is periodically updated. It is also based on sources such as member states' reports to human rights agencies, information provided by member states as a follow-up to the Fourth World Conference on Women (1995), and information available though other UN entities.

http://www.latinobarometro.org
Public opinion surveys administered each year to around 19,000 interviewees in eighteen Latin American countries, representing more than 400 million inhabitants.

http://www.iepala.es
Website of the Institute of Political Studies for Latin America and the World. (Spanish only).

http://www.guiadelmundo.org.uy
Compiles indicators showing the status of women in the political and economic life of various countries around the world. (Spanish only).

Economic, social and cultural rights

http://unstats.un.org/unsd/demographic/ww2000
Database created by the Statistics Division of the United Nations General Secretariat gives the latest statistics and indicators on women and men in six specific areas of interest: population; women and men in families; health, education, work, and political decision-making.

http://www.oecd.org/dac/gender
Web site of the Organization for Economic Cooperation and Development (OECD), administered by the OECD Gendernet. Includes information from member states on women's empowerment in areas of OECD concern: governance and development, poverty reduction, conflict and fragility, and cooperation, among others.

http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTGENDER/EXTANATOOLS/EXTSTATINDDATA/EXTGENDERSTATS/0,,menuPK:3237391~pagePK:64168427~piPK:64168435~theSitePK:3237336,00.html
World Bank site whose GenderStats section gives data and indicators on women throughout the world.

http://www.unesco.org/women/sta
The Gender Equality Division provides information on the status of women and girls in the five areas in which UNESCO works (education, natural sciences, social and human sciences, communication, and culture). Contains information on programs and publications that include statistical data.

http://www.ilo.org/gender
Web site of the International Labor Organization (ILO), which includes a section on gender equity in the workplace. Has statistical information and indicators on labor markets in each continent.

http://www.fao.org/Gender/gender-home
Contains publications, a database and surveys on gender differences in land ownership, agriculture and food.

http://www.unfpa.org/gender
The United Nations Population Fund publishes annual reports with data and indicators on reproductive health, women in emergencies, risky pregnancies, etc.

http://www.paho.org/spanish/DPM/GPP/GH/GenSalud.htm
Contains a database on various aspects of health and development of women and men in 48 countries of the Americas (Spanish only).

http://www.caricom.org/jsp/community_organs/gender_and_develop ment/publications.jsp?menu=cob

The CARICOM web site has a list of publications on gender and development, as well as information on laws affecting relations between men and women.

https://sta.uwi.edu/cgds/papers.asp

The University of the West Indies' web site has a list of working papers on gender issues in the Caribbean, including gender and employment, HIV, participation in politics, etc.

http://www.questia.com/library/book/gender-in-caribbean- development-papers-presented-at-the-inaugural-seminar-of-the- university-of-the-west-indies-women-and-development-studies- project-by-elsa-leo-rhynie-patricia-mohammed-catherine-shepherd.jsp

This is a link to an e-book on the issue of gender and development in the Caribbean, with a number of research pieces presented to the University of the West Indies.

http://minisis.eclacpos.org/scripts/minisa.dll/144/BIB_PROFILE/WEBOP AC_DET_AACR2_BIB/BIBLIO_CATEG+30.01.45+AND+BIBLIO_EDITION+0 2?SESSIONSEARCH

This web site provides information on gender and education in the Caribbean, including a number of studies on the topic.

http://www.iadb.org/research/pub_desc.cfm?pub_id=IDB-WP-210

A study on gender and earnings gaps: "Gender Earnings Gaps in the Caribbean: Evidence from Barbados and Jamaica".

http://www.cartierwomensinitiative.com/docs/Carribean_-_ILO.pdf

This link is to a study on jobs, gender and small enterprises in the Caribbean, with emphasis on Barbados, Suriname and Trinidad and Tobago: "Jobs, Gender and Small Enterprises in the Caribbean. Lessons from Barbados, Suriname and Trinidad and Tobago".

http://www.sice.oas.org/Genderandtrade/GT_papers_e.asp

This site has information on the topic of gender and trade, with a number of studies on the topic.

Gender-specific issues

http://www.eclac.org
Website of the the Economic Commission for Latin America and the Caribbean; the Division of Women's page has a variety of information on the status of women in the region. Of particular importance is the Observatory on Gender Equality in Latin America and the Caribbean, mentioned earlier in this Module, whose website, in addition to databases, contains information on the status of women's physical, economic and decision-making independence.

http://www.undp.org/women/
Contains information on UNDP initiatives that are considered "good practices" on various topics in countries around the world.

http://genderstats.worldbank.org
Statistics produced by the World Bank on gender. Data series and gender statistics by country and issue, including: poverty; capacity; opportunity; empowerment; security; demographics; human development; education; health; nutrition; violence; population changes; socio-economic roles and access to economic resources; labor force; political participation; and policies and programs.

http://www.un.org/womenwatch
United Nations site that has information on the work of the four UN gender agencies and other agencies of the System. Has publications, working papers, inter-agency programs, good practices, news, world surveys, and links to other sites.

http://sta.uwi.edu/crgs/february2010/index.asp#dialogues
The website of the University of the West Indies has this electronic journal, which addresses gender issues in the Caribbean. University of the West Indies. "Caribbean Review of Gender Studies".

http://www.americalatinagenera.org/es/
One of the sites devoted to compiling findings, studies, research events and other questions related to a gender equity approach in Latin America. It is managed by the UNDP Regional Center for Latin America. This initiative created a community of gender learning and practice, which is a virtual community for management and communication, driven by the need to exchange and share and provide feedback on knowledge and experiences among those working on gender issues in the region. (Spanish only).

http://www.unwomen.org/

The official site of UN Women, which was created in 2010 to bring together the resources and mandates of four UN agencies, with the goal of making a greater impact. It merges the Division for the Advancement of Women (DAW); the International Research and Training Institute for the Advancement of Women (INSTRAW); the Office of the Special Adviser on Gender Issues and Advancement of Women (OSAGI), and the United Nations Development Fund for Women (UNIFEM). The main roles of UN Women are:

- To support inter-governmental bodies, such as the Commission on the Status of Women, in their formulation of policies, global standards and norms.
- To help member states to implement these standards, standing ready to provide suitable technical and financial support to those countries that request it, and to forge effective partnerships with civil society.
- To hold the UN system accountable for its own commitments on gender equality, including regular monitoring of system-wide progress.

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Module 8
Gender indicators

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To understand the use and applications of gender indicators in the project cycle.

What are indicators?

Indicators are a measurement tool, a signal that 'indicates' to us the status of a situation and allows us to measure the advances--or setbacks—in that situation. Indicators provide information that is important to decision-making and that contributes to better management of policies, programs and projects. Indicators help measure achievement of anticipated results, and thus measure the efficacy and efficiency of the interventions.

Indicators also measure the upward or downward movement of change, and provide a parameter of whether the change is positive or negative.

The following questions are useful in developing indicators:

- How will we know whether our objectives and goals are being achieved?
- What change do we expect to see? What indications should we look for?
- What changes do we expect to see in the target populations or the beneficiaries?
- What can we look at to know whether change is occurring?

Source: Training course materials, "Gender and human rights-focused evaluation". Inclusion and Equity Consultants and UNIFEM. Montevideo, October 2010.

1. Ways of presenting indicators

Indicators can be shown in the following ways:

Number:

- Total numbers of girls whose child care needs were not met during the year.
- Total number of men and women entrepreneurs that attended job-training courses during the year.
- Number of countries that have ratified the Convention of Belém do Pará.

Percentage:

- Percentage of pregnant adolescents who entered the sexual and reproductive health program per year.
- Percentage coverage of the study-abroad fellowships program broken down by sex.
- Proportion of women who voted in the most recent elections compared to the total number of the female voting population.

Average:

- Average years of schooling by sex.
- Average grade received in tests to select the beneficiaries of the program.
- Average number of men and average number of women holding elected office in local governments.

Rate:

- Dropout rate from training courses, by sex.
- Labor force participation rate, by sex.
- Rate of change in program coverage over the last two years, by sex.

Ratio:

- Ratio of men/women in gender-focused training per year.
- Ratio of men to women in traditionally male occupations, by year.
- Ratio of men to women in the country's Upper House.

Gap:

- Gap between the average income of women's and men's principal occupation.
- Gap in access to job placement of unemployed workers in poor towns, by sex per year.
- Gap in the possibilities that men and women become victims of a sex crime.

Expression of a goal or achievement:

- Ratified or not ratified (referring to OAS Conventions)
- National legislation favoring work-life balance for men and women.

Qualitative:

- Satisfaction of users/client (men and women) with the public health service
- Interest of the community (men and women) in the activities of a program or project

Requirements for indicators

Indicators should meet the following requirements if they are to be useful and relevant:

- **Relevant**: they should focus on the essential processes and outputs of a program.

- **Simple**: they should cover the significant aspects of program performance, but their number should not exceed the analytic capacity of those who will use them.

- **Comparable**: the activities or units chosen for measurement should be comparable from one moment in time to another (every six months, every year, and so on).

- **Independent**: they should be independent of external factors and respond mostly to the actions of the program.

- **Reasonable cost**: The baseline information needed to construct the indicators should be able to be collected at a reasonable and foreseeable cost.

- **Reliable**: The basic indicator data should be come from systems that can be audited.

Example:

- *Name: Percentage of Latin American states that in the last five years have included provisions in their domestic laws on the prevention, punishment and eradication of violence against women.*
- *Formula for calculation: Number of States that included such provisions in their legislation in the last five years/total number of Latin American states.*
- *Goal: That 100% of Latin American states should have included such provisions in their domestic laws in the last five years.*
- *Source of information: Follow-up Mechanism to the Belém do Pará Convention (MESECVI).*

Gender indicators

Gender indicators also enable us to measure situations at a given moment and their evolution over time, and therefore show and make visible situations in which there is social and gender inequality.

Gender indicators should disaggregate information by sex, and allow for regular/periodic measurements and comparisons over time. These indicators should also identify the optimal situation, as well as variations in improvements in the status of gender inequalities (gaps, inequities and barriers). It is preferable to combine qualitative and quantitative indicators.

2. Functions of gender indicators

a) **To make problems visible**: they enable us to make women's problems and gender inequalities visible, and to show how they affect the rest of society, since certain disadvantageous circumstances are often not seen as a problem.

b) **To make fair and rigorous comparisons:** they enable comparisons to be made at a given time between, for example, rural and urban areas; they may look at the universe of men and women, but will also recognize specific, particular differences between them, as well as within groups of men and women.

c) **To study trends:** they enable changes that have occurred over time to be understood. We can know whether the investment in women's programs in a particular year is the same, worse or better than five years, or ten years ago, and so forth.

d) **To evaluate public policy:** in some cases, indicators are clear evidence of problems in the design and implementation of social policies. Some indicators are more sensitive in illustrating problems with policy coordination, shortcomings in policy implementation, or failure to achieve the desired results.

e) **To help in decision-making:** they inform decision-making at different levels, in order to plan overall policy on regulating the system in question, allocate resources needed to carry out the actions, and/or reformulate basic strategies. Indicators are useful in defining policy objectives and setting program goals. This latter function is particularly important in a system of indicators on gender disparities or gaps.

f) **To open up new fields of research:** they enable us to formulate new hypotheses and research theories. New research questions on the same or related topics can be developed at the time the indicator system is designed and the indicators are selected, as well as when the behavior of specific indicators is observed.

g) **As a tool for political and policy action:** as tools for social analysis, indicators can explore the relationship between the population's life circumstances (in our case, women's), and social and economic changes. They thus provide an organized picture of problems, priorities and possible social actions to improve the situation. They are tools both for civil society and for the State to organize social demands and channel resources for change.

3. Limitations encountered in the process of developing gender indicators

Developing gender indicators[37] may be made more difficult by the following:

a) *Lack of breakdown of information by sex*: this is perhaps one of the greatest limitations, because, even though progress has been made in recent years in producing sex-disaggregated data, there are still areas in which this information is not available, or else is available only for some periods, which means that the data cannot be compared over time.

b) *Lack of baseline data:* In spite of countries' efforts to gather high-quality national statistics, difficulties still, remain in systematically inputting sex-disaggregated data to be used in indicators.

c) *Objectives that do not incorporate an appropriate gender perspective*: another limitation is the failure to include a gender perspective in the formulation of the measurable objectives, or else the objectives are very general and imprecise.

4. Types of indicators

Indicators may be categorized in a number of ways. Two types of indicators are particularly important in planning.

a) *According to the type of issue being measured: qualitative and quantitative:*

- **Quantitative indicators** measure issues that can be quantified (percentage of women and men in Parliament, rates of sexual violence against men and women, access to the justice system, by sex).
- **Qualitative indicators** capture opinions, attitudes and feelings (perception of victimization, by sex, degree of men's and women's satisfaction with democracy, perception of lack of security, by sex). Qualitative indicators can be turned into quantitative units to make them measurable, but they still retain their characteristic of qualitative indicators.

b) *According to the level of results to be measured: Impact indicators, indicators of purpose and output indicators.*

- **Impact indicators** assess changes in gender relations in different areas. These changes are the result of many factors and processes. Impact indicators are often formulated as the rate of change in gender conditions in a time series that can show trends. They measure outcomes that show a significant and sustainable improvement in life circumstances.
- **Indicators at the level of purpose** are designed to measure intermediate and final outcomes on which the project has a direct impact. These indicators measure achievements and extent of change in the behaviors, status, attitudes and/or competencies of the target population that are attributable solely to the program or project itself.
- **Output indicators** refer to the outputs of the program components, that is, the goods, services and training that users receive directly from the project.

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[37] For more information, see: "Los indicadores de género, mitos y leyendas". Faúndez, Alejandra (2007). Document N° 2, Methodology Series. A publication of Inclusion and Equity Consultants. Santiago, Chile.

PERFORMANCE INDICATORS, TARGETS AND RESULTS

It is important to distinguish between the desired outcome, the indicator for measuring it, and the goal to be achieved by a particular date and/or for a specific group. Example:

- **Outcome**: Increase rates of graduation from secondary school in rural communities in the country.
- **Indicator**: Graduation rate.
- **Goal**: The graduation rate for young people in rural communities will rise from X to Y by 2014.

More examples:

Gender-sensitive capacity-building program against trafficking in persons		
Impact indicators	**Indicators at the level of purpose**	**Output indicators**
Number and percentage of men, women and children who have been victims of human trafficking in the region	Percentage increase in detection of human trafficking Percentage increase in police operations to prevent trafficking in persons Number of awareness campaigns with gender content carried out	Level of awareness of police officers on gender and human trafficking Percentage of police personnel trained and skilled to prevent trafficking in persons

Gender-sensitive program on access to justice		
Impact indicators	**Indicators at the level of purpose**	**Output indicators**
Number and percentage of men and women who exercise their rights	Number and percentage of women and men who know their rights Number and percentage of women and men who access the justice system Number and percentage of women and men who receive a response from the judicial system	Number of "judicial facilitators" active in the city or town Ratio of cases taken up by judicial facilitators vs. cases resolved Percentage of "judicial facilitators" with sufficient knowledge to advise on situations of violence against women

Some examples of gender indicators

Area for measurement	Description	Examples
Context	These indicators can help infer the effect of external factors on the course of a project (opportunities, threats)	Percentage of heads-of-household by sex and income quintile. Labor force participation rate, by sex. Average income from principal occupation, by sex. Literacy rate by sex.
Products	Goods and services directly received by the users/clients.	Percentage of poor families who receive conditional cash transfers that depend on the sex of the head of household. Total cost of technical assistance by sex of users/total number of technical assistance missions delivered. Average number of days for processing a loan, by sex of the client. Women's self-perception as candidates for election to public office. Number of political parties in the region that have quota rules.
Direct outcomes	Changes in the behavior, status, attitude or certification of the beneficiaries (men/women) after having received goods and services from the program or government action.	Percentage of micro-businesses that introduce management innovations, by sex of the micro-businessman or woman. Disapproval of drug use, by sex. Spending on election campaigns by party, according to the sex of the candidates. Increase in women in elected posts in local government.
Impacts	Results that involve a significant and sustainable improvement in the living conditions of the target population (men/women). Are sometimes hard to measure, because of the difficulty of isolating external factors, and/or because they are long term.	Percentage of female micro-entrepreneurs who improve their independent income. Percentage of youth job placement, disaggregated by sex. Gender gaps in elected posts in the country.

Source: Author's adaptation, based on Vincent Von Borries "Género, planificación e Indicadores". En: http://www.sernam.cl/pmg/documentos.php

5.   How to select appropriate gender indicators?

Gender indicators must, above all, provide information for the questions asked about what we want to measure (advances, progress, or processes), and we therefore suggest the following:

ASKING THE RIGHT QUESTION

What do we want the indicator to tell us? Do we want to know whether the situation of women only has improved? Do we want to know whether there are changes or variations in gender gaps? Do we want to evaluate a strategy that looks at outcomes differentiated by sex?[38], and so forth.
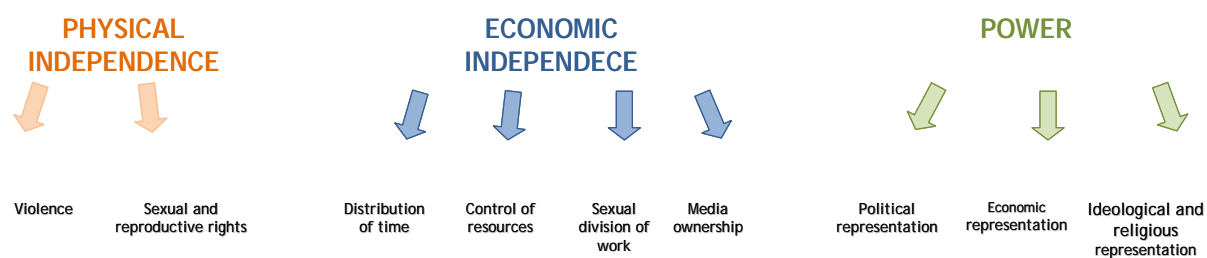
ANSWERING THE QUESTION

Find the information needed, depending on whether we simply seek a measurement, or whether we also want to make comparisons. Bear in mind that the information must be available.

SOURCES OF INFORMATION

For preference, select sources of information that are regular or periodic (those that permit comparisons over time), official (recognized by government institutions, and of acceptable quality), and that are also disaggregated by sex. These may be from censuses, household surveys, specific regular surveys, administrative records, and so on.

In the literature, we can generally find areas of gender inequality that are structural in nature, and that can help us develop gender indicators to measure the changes sought through the project. These are:

PHYSICAL INDEPENDENCE

Violence

Sexual and reproductive rights

ECONOMIC INDEPENDECE

Distribution of time

Control of resources

Sexual division of work

Media ownership

POWER

Political representation

Economic representation

Ideological and religious representation

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[38]   Looking at strategy, for example, according to Moser (2005), the large array of policy responses to crime and violence can be grouped into five categories: (i) criminal justice (including the police system, the judicial process and the penal system); (ii) public health (which identifies risk factors and maps crime and violence in order to prevent and control it); (iii) conflict transformations (which looks at the way in which institutionalized, systemic and arbitrary violence may create pre-conditions for future social violence); (iv) environmental change (which looks at the possibility of preventing crime by modifying the physical environment), and (v) development of social capital (which aims to reduce crime and violence by promoting civic values, trust, cooperation and social engagement within communities). In this context, we should ask which is the preferred strategy to be used in the project, and what results we can expect from it for women and men.

Checklist for developing gender indicators

- Are the indicators appropriately related to the project's gender equality objectives and outcomes at all levels?

- Are the indicators linked to a goal, allowing us to examine the upward or downward movement of change in gender equality?

- Did the stakeholders participate in developing the indicators?

- Have quantitative and qualitative indicators been used to measure gender conditions, positions and/or relations in the project?

- Do they measure a trend in gender gaps, inequities or barriers over a specified period of project execution?

- Do we have a baseline for measuring gender equality objectives in the project?

- Can the outcomes be interpreted from a gender perspective (analysis of activities, access to and control of resources and benefits, needs or influences)?

Glossary

SEX-DIFFERENTIATED IMPACT

Outcomes of activities that have different effects on the lives of women and men.

INDICATOR

An indicator defines and shows how to measure, quantitatively or qualitatively, the results that must be achieved in order to attain an objective.

GENDER NEEDS

This term comes from a concept developed by Maxine Molyneux in the eighties. Molyneux differentiates between strategic gender interests and practical gender interests. In 1989, Caroline Moser translated this concept into the language of cooperation, applying the terms to practical and strategic needs.

PRACTICAL GENDER NEEDS

Needs derived from the activities that men and women engage in or the roles they play, and that help them more easily perform those roles. Thus, women tend to be perceived as mothers, housewives and providers of the family's basic needs, where needs that arise are seen immediately as having to do with survival and poor working conditions, namely, needs such as lack of food, drinking water, housing, electricity, sanitation, employment, income.

STRATEGIC GENDER NEEDS

Essential to understanding strategic needs is the concept of "power", which in this case is understood as being at the core of these strategic needs. Gender demands are therefore are associated with an increase in women's control over benefits, resources and opportunities so that they can improve their position.

Thus, strategic gender needs refer to "everything that should be remedied in order to overcome women's subordinate position to men and the empowerment of women".

These are needs that aim at making substantial changes in strategic areas such as: the law, non-sexist education, participatory models of development, full citizenship of women and a life without violence. It is therefore a question of demands that can be amended, always starting from the principle that the situation in which they arise is a product of society and history.

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SUPPORTING MATERIALS:

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Module 9
Checking whether a logical framework is gender-sensitive

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To provide tools for identifying issues and assessing
whether a logical framework is capable of incorporating
a gender equality approach.

Introduction

These days, project planning uses the Logical Framework Approach (LFA), which goes beyond the Logic Framework Matrix to include a series of tools to assist in the planning, execution and evaluation of a project. Over time, this approach has come to include a set of increasingly standardized tools, which can be backed up with specific gender analysis tools[39], namely:

Steps in the Logical Framework Approach	Gender analysis tools
Stakeholder analysis	Activity profiles
	Access to and control of resources
	Quality of participation or engagement
Problem analysis	Analysis of problems associated with women's and men's condition and position and relations between them
	Analysis of gaps, inequities and barriers
	Checklist for using a gender equality approach to problem definition
Analysis of objectives	Access to and control of resources and benefits
	Practical needs and strategic interests
	Checklist for including a gender equality approach in the definition of objectives
Alternatives analysis	List of criteria for checking whether a gender equality approach was included in the selection of alternatives
Logical Framework Matrix	Activity profiles
	Access to and control of resources and benefits
	Practical and strategic needs
	Influences on gender relations
	Quality of participation or engagement

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[39] This proposed tool is based on the Practical guide to including equality between women and men in Spanish Cooperation projects (2004).
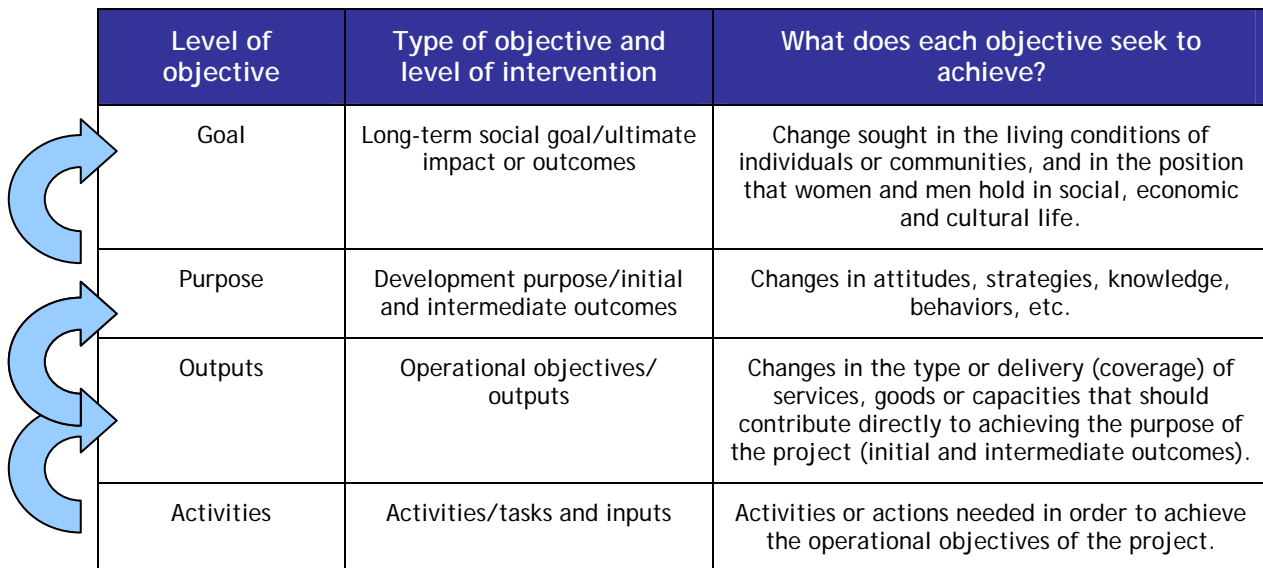
We should not lose sight of the fact that the logical framework matrix is a tool, an instrument. As has often been said, it is a kind of road map to the project's objectives and the means of achieving them. It is intended simply as a schematic outline that brings together all of the relevant information needed to describe the basic components of the project, and to evaluate progress at different stages of project execution.

It shows, in a systematic, summarized and logical way, what the objectives of a program are, and the causal relationships between them. It also defines factors that are external to the program that may influence execution. The matrix can be modified or improved several times during the preparation of the program or project, and during execution. As the program is carried out, a critical analysis may be done and needed adjustments made to the matrix, so that the program can take into account the processes that have been influencing it.

We should remember that however good an instrument or tool, it cannot by itself guarantee the success or achievements of a project. The project needs a set of "other" conditions that are necessary for successful performance, such as: a competent team who are clear about the strategy and the project's value to the sector; precise intervention mechanisms; appropriate organizational arrangements; agreements and consensus among the actors involved, the views of a gender specialist, etc.

The hierarchical logic of objectives follows a causal chain from activities to outputs, from outputs to purpose and from purpose to goal:

Table 1
Matrix describing objectives according to Logical Framework levels

Level of objective	Type of objective and level of intervention	What does each objective seek to achieve?
Goal	Long-term social goal/ultimate impact or outcomes	Change sought in the living conditions of individuals or communities, and in the position that women and men hold in social, economic and cultural life.
Purpose	Development purpose/initial and intermediate outcomes	Changes in attitudes, strategies, knowledge, behaviors, etc.
Outputs	Operational objectives/ outputs	Changes in the type or delivery (coverage) of services, goods or capacities that should contribute directly to achieving the purpose of the project (initial and intermediate outcomes).
Activities	Activities/tasks and inputs	Activities or actions needed in order to achieve the operational objectives of the project.

Incorporating a gender perspective into the Logical Framework

The Logical Framework Approach, and the project matrix that is part of it, is a tool that is widely used in planning. It may be gender-neutral. When a "gender-neutral" action is taken, the situation does not necessarily become worse, but neither do the prevailing gender norms, roles and stereotypes improve, and therefore, the action does not contribute to equality among men and women. Hence, in order to advance towards achieving equality between men and women, this LFA tool should be employed using a gender approach.

Including a gender approach in the logical framework means that each component of the Logical Framework Matrix must be seen from a gender perspective, which means that a gender analysis must be performed using the dimensions set out in Module 5 of the present Handbook[40]. This analysis must be done not only at the beginning of the project, but throughout its execution and in the monitoring and evaluation processes.

Table 2
Checklist for including a gender equality approach in the Logical Framework

The following questions should be answered to determine whether a Logical Framework Matrix is gender-sensitive at each level and in each column in the matrix:

	Objectives	Indicators	Means of verification	Assumptions
GOAL	Is the project goal aimed at changing gender relations, or does it propose a social change in that direction? Does it refer explicitly to men and women?	Do the indicators enable us to measure progress towards the goal in relation to both women and men? Is there an indicator that will measure gender impact?	Is the information available for verification of the goal disaggregated by sex and analyzed from a gender perspective?	What are the major external factors needed to ensure that the goal responds to the needs and interests of men and women, and to ensure the sustainability of the positive gender impact?
PURPOSE	Is the purpose geared to overcoming existing gender gaps, inequities or barriers? Does it consider the differentiated interests and needs of men and women? Does it reflect strategic gender needs?	Do the indicators enable us to verify whether the outcome considers gender equality? Do the indicators measure a reduction in the gender gaps, inequities and barriers?	Is the information available for verification disaggregated by sex and analyzed from a gender perspective? Which gender analysis tools could be used?	What are the major external factors needed to ensure that it contributes to decreasing gender inequities?

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[40] Module 5 on Gender Assessments.

OUTPUTS	Are gender roles and responsibilities being taken into account in the distribution of benefits (goods, services and capacities)? Do the outcomes benefit both men and women?	Do the indicators measure whether the benefits of the project reach men and women in an equitable way? Do the indicators measure whether the different groups of women and men who are committed to the project receive equal benefits from it?	Is the information to be used for verification of the outputs disaggregated by sex and analyzed from a gender perspective, and is that information available? Which gender analysis tools could be used?	What are the major external factors needed to ensure that project benefits reach women and men?
ACTIVITIES	Did the planning of activities take gender relations into account? Are men and women sufficiently visible as actors and decision-makers in the execution of project activities? Are the contributions of men and women to the project made visible? Do women have access to and control over project resources?	Has adequate provision been made in the budget for strategies to advance the participation of women and their access to the resources and benefits? Is it clear what percentage of the total budget will benefit men and women directly? Does the budget make provision for hiring gender specialists, or for conducting gender awareness and training activities?		What are the major external factors needed to ensure that men and women participate in and are committed to the project?

Source: Adapted from the Spanish Ministry of Foreign Affairs (2004).

Table 3
Example of a Logical Framework Matrix with a gender focus

	Objectives	Indicators	Means of verification	Assumptions
GOAL	To contribute to a balance in men's and women's political participation in the region	Gender gap in elected positions Number and percentage of political parties that adopt gender quotas	Inter-Parliamentary Union database Questionnaire to political parties	That democracy remains stable in the countries
PURPOSE	To improve the position of women in the country's legislative body	Number and percentage of women in Parliament in each country	Reports from the Elections Board	That the country's legal framework is favorable to the participation of women
OUTPUTS	1. Women leaders trained	Number and percentage of women with political leadership capacities and skills developed. Self-perception of women as possible candidates for public office	Exit test after training activities Survey on self-perception of their political potential	That women have social and family support for running as candidates in elections
	2. Political parties sensitized	Number and percentage of political parties reporting an increase in women candidates on their electoral lists	Report from the Elections Board	
ACTIVITIES	1.1 Three training courses in each country, each lasting one month, for 30 participants, to be taught by local trainers	Budget	Budget execution report	Sufficient number of women leaders interested in participating
	2.1 Awareness seminars with leaders of political parties 2.2 Bilateral talks with party leaders	Budget	Budget execution report	That political parties are open to and aligned with the ideas of gender equality and equity Political parties support a Quota Law

Source: Developed by the author.

Glossary

GENDER NEUTRAL

Gender-neutral means thinking that gender is not relevant or important in achieving development objectives, and therefore not considering the differences and inequities that exist between men and women. Neutrality does not mean consciously acting in a discriminatory way, but rather that discrimination and inequities between men and women in society are not taken into account.

GENDER PERSPECTIVE

Gender perspective is a development planning concept. It refers to the analytical and political potential of the category of gender, and uses the category of gender on the one hand as an analytic tool, and on the other, as a political proposal. A gender perspective considers relations and differences between men and women before, during and after any activity or process.

It starts from the assumption that relations between men and women are characterized by a structural inequality, and as a result, that policies will affect men and women in different ways. The goal is to achieve greater equity among the genders; achieving it means that this objective should be present in all policies, programs and projects. It helps bring to the surface power relationships and the subordination of women, understand the causes, and find ways of overcoming gaps. It also helps recognize that relations are unequal and that there is oppression and injustice in the way gender is organized in society. Using a gender perspective thus requires an institutional commitment to building gender relations that are fair and just.

It also means taking the position that the sex-gender order or system, which sustains forms of hierarchical relations between the genders, should be transformed. Using a gender perspective has ramifications for an institution, and the process begins with the organization's decision to embrace this perspective in its strategic thinking or approaches.

PLANNING WITH A GENDER FOCUS

Planning with a gender focus does not concentrate on women as a separate category, but rather addresses gender, which touches all unequal dimensions and social relations between men and women. Underlying this proposition is achievement of "equitable, sustainable development" that will assure distribution of the benefits deriving from the process.

Gender planning is a theoretical set of procedures, methodologies and tools for including a gender perspective in development actions, and is thus a fundamental part of a gender perspective in development. It means understanding the planning process as political in nature, and not simply technical, since it views inequality among men and women as a guidepost to achieving equality and equity.

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Module 10
Gender-sensitive monitoring and evaluation

Handbook on mainstreaming gender equality
into the OAS project cycle

Organization of
American States

Objective of the Module:

To provide conceptual and methodological tools for a gender equality approach to project monitoring and evaluation in Results-Based Management.

Introduction

Conceptually, the central objective of comprehensive project management is to strengthen an institution's planning, execution, monitoring and evaluation functions. Unlike normative methodologies that posited planning, execution and evaluation as different stages, this new proposal is part of the strategic planning and Results-Based Management (RBM) paradigm; it proposes that all processes be coordinated and considered as "moments" that are under continual review and examination.

Evaluation and the ongoing monitoring of project progress are important RBM tools. By assessing what works and what does not work, and why, evaluation can provide information to support the Organization's decision-making, and promote a culture of accountability in project executing agencies, which should result in improvements in project performance and better performance by the Organization as a whole.

Evaluation, therefore, is understood as a process of investigation and assessment that generates information and lessons learned, in order to improve decision-making, assure efficacy and quality of processes, outcomes and impacts, and provide ongoing feedback to management.

For the purposes of the present document, the terms "monitoring" and "follow-up" refer to a systematic procedure used to demonstrate the effectiveness and efficiency of the project execution process, in order to: (a) identify the results and weaknesses, and (b) recommend corrective measures to optimize desired results. Monitoring takes place during the execution phase of the project cycle.

By "evaluation", we understand a systematic appraisal of the design, execution, efficiency, effectiveness, processes, and results (or impact) of a project that is under way or that has been completed. Evaluation essentially takes place throughout the entire project cycle, and normally involves individuals not directly linked to project operations.

Project monitoring and evaluation may also be a suitable process for introducing a gender perspective. When providing information on how the project is proceeding, tools can be used to look at how it is addressing gender problems or interests that remain unresolved or that may be unanticipated results of the project.

There is also growing interest in evaluating and/or measuring, for different purposes, advances in the status, condition and/or position of women in society. A set of norms, standards, directives and mandates are being developed to facilitate or guide this effort.

Mandates on the need to measure gender issues

The need to promote change and propose new policies to correct the inequalities between men and women drove a demand for statistics and indicators on the status of women. This concern has been voiced in a number of international conferences, at which Governments and women's groups have proposed and agreed on the need for sex-disaggregated data and indicators. Below are a number of statements by the United Nations and the Organization of American States on the matter:

The *Platform for Action of the Fourth World Conference on Women* (Beijing, 1995) dedicated a strategic objective (H.3) to the need to prepare and disseminate sex-disaggregated data and information for planning and evaluation purposes. It specifically recommended:

- Collect, compile, analyze and present on a regular basis data disaggregated by age, sex, socio-economic and other relevant indicators, including number of dependents, for utilization in policy and program planning and implementation and to reflect problems and questions related to men and women in society; (para. 206 b);

- Promote the further development of statistical methods to improve data that relate to women in economic, social, cultural and political development; (para. 208 b).

The report of the Ad Hoc Committee of the Whole of the special session of the United Nations General Assembly entitled Women 2000: Gender Equality, Development and Peace for the Twenty-First Century (New York, June 5-10, 2000) notes that:

- Effective and coordinated plans and programs for the full implementation of the Platform for Action require a clear knowledge of the situation of women and girls, clear research-based knowledge and data disaggregated by sex, short- and long-term time-bound targets and measurable goals, and follow-up mechanisms to assess progress. Efforts are needed to ensure capacity building for all actors involved in the achievement of these goals. Efforts are also needed at the national level to increase transparency and accountability (para. 64).

- Develop and use frameworks, guidelines and other practical tools and indicators to accelerate gender mainstreaming, including gender-based research, analytical tools and methodologies, training, case studies, statistics and information (para. 80).

Governments, regional and international organizations and international financial institutions were recommended to:

- Promote international cooperation to support regional and national efforts in the development and use of gender-related analysis and statistics by, inter alia, providing national statistical offices, upon their request, with institutional and financial support in order to enable them to respond to requests for data disaggregated by sex and age for use by national Governments in the formulation of gender-sensitive statistical indicators for monitoring and policy and program impact assessments, as well as to undertake regular strategic surveys (para 92 (a)). .

In this region, the Lima Consensus, adopted by the Eighth Regional Conference on Women in Latin America and the Caribbean with a view to strengthening the Regional Program of Action, 1995-2001 and promoting effective implementation of the Beijing Platform for Action, recommended to countries that they:

- Strengthen systems for collecting and processing statistical data disaggregated by sex, And adopt the use of gender indicators that will contribute to a baseline analysis of the status of women and to the implementation of public policies at the national and regional levels and that will make it possible to improve the monitoring and assessment of regional and international agreements; (para (x)).

Summit of the Americas

- At the Fifth Summit of the Americas (Port of Spain, 2009), the Heads of State and of Government declared: "We recognise the importance of considering the differentiated needs of women and men in promoting and ensuring the integration of the gender perspective as a cross cutting issue in national and hemispheric policies, plans and programmes to be implemented in the political, economic, labour, social and cultural spheres. In this regard, we will continue our efforts to produce regional studies and statistics disaggregated by sex for measuring and monitoring, and for promoting cooperation and the sharing of good practices, experiences and policies among States on gender equality and equity within the context of human prosperity, energy security and environmental sustainability." (para. 6 of the Declaration of Commitment of Port of Spain).

What is an evaluation?

An evaluation is an assessment, as systematic and impartial as possible, of an activity, project, program, strategy, policy, topic, theme, sector, operational area, institutional performance, etc. It focuses on expected and achieved accomplishments, and examines the results chain, processes, contextual factors and causality, in order to understand the achievements or the lack thereof. It aims at determining the relevance, impact, effectiveness, efficiency and sustainability of the interventions and contributions of the organizations of the UN system. An evaluation should provide evidence-based information that is credible, reliable and useful, enabling the timely incorporation of findings, recommendations and lessons into the decision-making processes of the organizations of the UN system and its members."

United Nations Evaluation Group, 2005.

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Gender-sensitive monitoring and evaluation

"Evaluation is a technical and political instrument and political and value issues are an integral part of an evaluation. Virtually every phase of the evaluation process has political implications."

(Kellogg Foundation, 1997)

The most important points for incorporating gender into an evaluation are:

a) **The OBJECTIVES of the evaluation should respond to gender equality mandates.**

Here, we have different options:

- When gender equality is the principal focus of the intervention
- When gender equality is incorporated throughout, in a crosscutting way.
- When gender equality is not part of the design of the project objectives.

Projects will always have consequences for gender equality, whether expressly stated or addressed, or not; the difference lies in the degree to which such considerations are explicitly included in the project design and how they can be addressed during the evaluation.

We shall find different situations when using a gender equality approach to evaluation, and should take into account, at a minimum, the following[41]:

High Evaluability: when a gender analysis or human rights analysis is available (including an analysis of the gender equity and human rights mechanisms), when disaggregated data are available (disaggregated by sex or other pertinent criteria), and when the project philosophy and

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[41] Adapted from the Guide to incorporating a human rights and gender equality approach, of the United Nations Evaluation Group (UNEG) (2010) and from the course "A gender and human rights approach to evaluation", conducted by the Evaluation Office of UN Women and Inclusion and Equity Consultants in 2010 and 2011.

design have also paid attention to human rights and gender equality. This means that the mandate here should include addressing these areas in the evaluation.

Average Evaluability: If gender equality and human rights were not taken into account in the design and implementation of the intervention, and if disaggregated information is not available either in the logical framework or in the follow-up reports, the evaluators will still be able to collect data during the evaluation fieldwork. The terms of reference should ensure that the criteria for data collection include women and men separately.

Low Evaluability If gender equality and human rights were not taken into account in the design and implementation of the intervention, and if data collection is not possible. The evaluation will be weak in terms of addressing human rights and gender equality. This concern must be noted in the terms of reference; the evaluators should also note this absence in the methodology section of their report, and discuss the consequences in their conclusions and recommendations.

Systemic weakness: If human rights and gender equality are not included in several of an institution's interventions (i.e., if the evaluability of these dimensions is weak in a number of planned evaluations), it might be recommended that project design staff and managers of evaluations be trained to use this new approach in all phases of the planning and design of evaluations.

b) **The ASSESSMENT of gender issues should be part of the entire evaluation process.**

When preparing for an evaluation:
- Consider the design and planning of the evaluation.
- Take gender equality and human rights problems into account.
- Take into account the resources needed (time, money, technical knowledge) to include gender and human rights.
- Take gender and human rights into account in the assessment of evaluability.
- Conduct a stakeholder analysis that includes women and other discriminated groups who are rights holders and duty bearers.
- Choose the correct criteria and approaches: combined methods that are culturally sensitive, participatory, etc.

When conducting the evaluation:
- The design and conduct of the evaluation should be transparent and it should have accountability.
- Both rights holders and duty bearers should participate (e.g., as key informants, or members of reference groups, etc.). Participatory processes should be used.
- Power relationships in the evaluation process should be reflected, so as to bear in mind means of ensuring that the process itself does not reinforce discrimination, or discriminate against or marginalize women and other groups facing discrimination. How can the process contribute to the empowerment of women and other groups facing discrimination, and promote gender equality and the exercise of human rights?

When preparing and disseminating reports:

- The dissemination strategy should ensure that the conclusions of the evaluations be accessible without restriction to women, including those who have rights and those who have duties.
- Communicate with organizations and networks of women, and networks of knowledge
- Use easily-understandable language
- Hold workshops with stakeholders, including women and other groups facing discrimination.
- A management response to the evaluation report should be considered, to ensure that the institutions follows up on the gender problems detected in the project.

c) **The PROCEDURES and METHODS should be gender-sensitive.**

- The methods should address women's situations in a particular context (women's time, the places they go to, the cultural contexts, specific ethical guidelines).
- Combined methods should be used, since they increase the possibility of capturing the voices of women and other groups facing discrimination.
- The indicators should be sensitive to differences among groups, and should measure project outcomes for groups facing particular instances of discrimination or disadvantage.

The gender analysis framework, feminist paradigms of transformation, and a right-based approach are fundamental, and they all have the following implications for evaluation:

- Gender inequalities: specific attention should be paid to gender inequalities, and, to the extent possible, the intersection between gender and other variables of inequality should be analyzed (social class, ethnicity, disabilities, etc.).

- The subject should be treated with respect and as an equal: the power relationship between the evaluator and the people in the program being evaluated should be balanced and even.

- Ethical considerations should be given high priority throughout the study.

- The political or policy dimension of the evaluation should be recognized, and power relationships should be explicitly examined.

- Women's experience and ways of 'knowing things' is valued and reflected in the evaluation process: in the questions, the methods and techniques employed, in the use of the findings. The evaluator should be aware of his or her own role and values.

- The evaluation design and methods used should include, but not be limited to: disaggregation of information by sex, to ensure that the gender analysis is appropriate (on questions such as use of time, control of resources, participation in decision-making, gender violence); the use of appropriate methods (combined methods, both qualitative and quantitative, participatory processes, capacity-building, reflexivity, and appreciation of the experience of participants, particularly of those women and groups facing the most discrimination), and the use of techniques to promote inclusion.

- Uses the knowledge produced by the evaluation process to promote social justice.

The evaluation using a human rights approach:

- May support the creation or strengthening of a culture of rights.

- Puts people first, particularly those groups that have been discriminated against, and promotes human development.

- Identifies rights holders (women and men) and duty bearers, thereby increasing accountability in achieving rights.

- Brings in the normative framework, with emphasis on those groups that facing the most discrimination.

- Stresses a holistic understanding of human rights.

- Promotes the empowerment of participants, particularly those groups that have been most discriminated against, by using participatory and inclusive methods.

- Analyzes both processes and outcomes.

Basic to this new approach to evaluation is making an effort to include the project's actors in the evaluation process. In order to do so, we must check whether they have been involved in the project evaluation:

Users of the evaluation	Y	N
Was an analysis done of stakeholders and other participants in the intervention to ensure that their roles, interests and capacities were identified and that their different points of view are adequately reflected in the evaluation?		
Is it clear how the different groups that participate in, or relate to, the intervention (e.g., beneficiaries, executing agents, officials at different levels, Organizations, experts, etc.) will be involved (for example, as planners, participants, key informants, or users)?		
Have the supervisors, evaluators and the project management team had appropriate experience with gender equity issues?		
Have the supervisors, evaluators and the project management team had appropriate experience with different perspectives, skills and expertise needed for the intervention?		
Do the stakeholders participate in determining how the evaluation will be used, and is their participation assured?		

Source: Adapted from UNEG (2010). Handbook for Integrating Human Rights and Gender Equality Perspectives in Evaluations in the UN System. Draft document, July 2010.

Some of the following points may be taken into consideration in determining the extent to which stakeholders will participate in an evaluation:

1. Beneficiaries, executing agents, rights holders and duty bearers may participate with different degrees of intensity; this has implications for the level of effort, deadlines and budget for the evaluation. Their participation may include one or more of the following: (i) deciding on the questions for the evaluation, (ii) determining what information is needed to answer those questions (indicators, sources of data), (iii) deciding on the best way of collecting the information (methods, timelines), (iv) field work, (v) analyzing the information collected and its importance, (vi) proposing recommendations and commenting on their priority and importance, and (vii) promoting and communicating the findings of the evaluation and its recommendations.

2. A decision as to whether all of the persons involved should be consulted as a group, or separately. If they are to be consulted, what process will be used to ensure that they are heard? How will we avoid biases caused by the fact that some may be more reticent than others for a number of reasons (differences in power, levels of literacy and trust, etc.). How will differences be mediated? How will agreements be reached, and how will decisions be taken when differences cannot be reconciled?

3. Make sure that the level of participation called for in the evaluation is not at odds with the level of participation in the intervention that is to be evaluated. For example, if the intervention is not participatory, people will be distrustful of taking part in a participatory evaluation. Could there be prejudicial consequences for individuals or groups if they do not agree with certain criticisms of the intervention? If the intervention was highly participatory, we should ask whether the evaluation will be well received if the stakeholders do not participate in it.

4. Establish a clear communications strategy as to who participates, who is consulted, and who takes decisions when or if there are differences of opinion among the stakeholders.

5. Ensure that the evaluators are sufficiently committed, and that they have the understanding, facilitation skills, cultural sensitivity and experience to deal with the level of participation decided upon.

6. Bear in mind that the credibility of the evaluation outcomes will stand or fall by the level of participation.

How to choose an evaluation type

- What purpose does the evaluation serve? What decisions should it help us to take?
- For whom do we wish to collect information through the evaluation?
- What type of information is needed in order to take the decisions that need to be taken and/or to clarify issues for those receiving the information?
- What are the sources of the information we wish to collect?
- What reasonable methods do we have available for obtaining this information?
- When is the information needed?
- What resources are available for collecting the information?

Evaluation teams

When planning a gender-sensitive evaluation, a decision should be taken on the makeup of the evaluation team, which should be made explicit in the terms of reference, particularly in the case of an external evaluation. Insofar as possible, the following attributes and capacities should be sought:

- Should include both women and men,

- Local and international evaluators,

- Knowledge of and experience with the use of quantitative and qualitative methods,

- Knowledge of the sectors that are the subject of the evaluation,

- Knowledge of and experience with gender equality and human rights,

- Understanding and application of international mandates on human rights and gender equity,

- Understanding and application of OAS mandates on human rights and gender equity,

- Experience with and knowledge of participatory approaches and methods, and research capacities and ability to relate to people, including cultural sensitivity.

Glossary

EVALUATION

"Evaluation is the systematic collection of information on the characteristics and outcomes of programs, in order to make a judgment about them, improve their effectiveness and <u>inform decisions</u> on future programs." Patton (1997).

"Evaluation is now thought of as a strategic tool for <u>empowering people</u>--evaluation for empowerment—and to improve project and program performance, focusing the evaluation on the use to which the users will put it—evaluation focused on use". Segone, Marco. "Democratic evaluation". UNICEF working paper. (1998).

"We may think of evaluation as a broader social service, as a tool for raising questions about social justice in particular contexts of action, or more broadly, to influence social thinking and actions". Saville Kushner (2000).

EX ANTE EVALUATION

A critical evaluation of the potential value of an intervention, done before taking a decision on whether to carry out the intervention.

MONITORING

Management's ongoing examination during the period of execution of how the intervention is progressing, to determine whether it is in accordance with the planning, and to take any decisions needed to improve performance.

INDIRECT MEASUREMENT

A measurement that is indirectly related to the thing to be measured (e.g., the human development index and/or the quality of life index as a measurement of protection of economic and social rights).

NOMINAL LEVEL OF MEASUREMENT

An indicator that classifies something into mutually exclusive categories (e.g., gender, or religion).

ORDINAL LEVEL OF MEASUREMENT

An indicator that measures something on a rank-ordered scale (for example, social class, education).

RESEARCH

Systematic examination designed to develop or contribute to knowledge.

DUTY BEARERS

Those institutions in a country that must protect, respect and comply with their legal obligations in the area of human rights.

RIGHTS HOLDERS

All individuals and groups that can claim their rights in a particular jurisdiction.

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