INSTRAW

THE WOMEN IN DEVELOPMENT DIMENSION IN EVALUATION METHODOLOGIES

Report from the Consultative Meeting:
Evaluation Methodologies for Programmes and Projects on Women in Development
New York, 8 - 10 November 1989

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on Women in Development

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This report is being published as a benchmark of UN activities in the quickly moving area of monitoring and evaluation. Many of the techniques and formats described have been surpassed, reevaluated, and modified. The concept of "Women in Development" has been expanded by many agencies to the more comprehensive idea of gender in development.

Continuous cooperation and dialogue by UN agencies and organizations and others are needed to share experiences with evaluation methods which include a gender perspective as well as lessons learned in terms of organizational efficiency and development assistance efficacy.

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INTRODUCTION

The numerous resolutions adopted by inter-governmental bodies during the previous two decades express the increasing importance attached to answering two concerns: (i) to ascertain the extent to which the activities undertaken by organizations of the United Nations system achieved the objectives intended by those bodies, to solve or ameliorate specific problems; (ii) to obtain, as far as possible, objective appraisals of the effectiveness and efficiency with which those activities were carried out.

The General Assembly, for example, issued several resolutions from 1977 to 1985, that called for monitoring and evaluation of programmes and projects along these lines: resolutions 32/197, 36/228, 37/234, 38/227, 39/238 and 40/240.

Similarly, the previous two decades witnessed the growing awareness about unequal conditions and the numerous constraints faced by women in most societies and the increasing international action to ameliorate them. This action was particularly related to the World Conferences on Women held in 1975, 1980 and 1985. The latest, held in Nairobi, culminated in the adoption of the Forward-looking Strategies for the Advancement of Women which are being implemented through the System-wide Medium-term Plan for Women and Development for the period 1990-1995.

It is in this context that INSTRAW was specifically instructed to include the elaboration of special methodologies for monitoring and evaluation in its activities. The mandate emanates from:

1. Resolution 1985/25 of the Economic and Social Council. It recommended, interalia, that INSTRAW accord special attention to the elaboration of special methodologies promoting broad-based approaches for programmes and projects on women and development and to the evaluation of their effects.

2. Resolution 42/65 of the General Assembly which required the Institute "to promote general awareness of and training in the pragmatic approach to the integration of women into policy designs, including the elaboration of special methodologies for monitoring and evaluation purposes", with particular reference to the implementation of the Nairobi Forward-looking Strategies for the Advancement of Women and the feedback of results into the operational system.

3. The System-wide Medium-term Plan for Women and Development, for the period 1990-1995, which constitutes the framework for system-wide implementation of the Forward-looking Strategies. Under Sub-programme 5.4 on Technical Cooperation, Training and Advisory Services, the Plan identifies, amongst various inter-governmental objectives, "to institutionalize responsibility and accountability for the implementation of policies concerning women within organizations". Similarly, among the United Nations system's objectives, "to incorporate in the procedures of all organizations of the United Nations system a requirement that the intended and potential impact of technical cooperation on women be identified so that consideration of this factor may become an integral part of the appraisal, monitoring and evaluation process". In line with this objective, it states that a methodology must be developed to permit that potential impacts on women be easily identified.

INSTRAW, therefore, included in its proposed programme for 1988-1989, a monitoring and evaluation methodology for programmes and projects on women in development, within Programme Cluster Two, Issues Relevant For Policy Design. Its planned outputs were:

(i) A survey of existing methodological approaches to the integration of women in evaluation.
(ii) A consultative meeting focused on the consideration of a women's dimension in the monitoring and evaluation of development programmes and projects.
(iii) The report and proceedings of the consultative meeting.

Corresponding activities were conceived as the initial steps in a series that would continue into the following biennium. The objective would be the elaboration of methodologies that would facilitate measuring the impact of assistance programmes and projects on women. These activities would respond not only to the mandate of the resolutions referred to above but also to the need for broader action within the system to integrate concerns of the Forward-looking Strategies into all programmes and activities. This would be achieved through further developing the tools of evaluation, so that the capacity for identifying delays, lapses, and failures in attaining this integration, as a basis for undertaking corrective action and/or policy review, is enhanced.

Part I reproduces the report on the Consultative Meeting on Evaluation Methodologies for Programmes and Projects on Women in Development, 8-10 November 1989, revised according to comments and suggestions of participants to draft version circulated in 1990.

The current publication is the first of the second set of activities under the monitoring and evaluation rubric. It includes, in Part II, the updated survey paper on methodological approaches to the integration of women in evaluation within the United Nations system. The paper was initially written as a background for the Consultative Meeting that took place in November 1989. It was updated in 1990 following the directive from the Board of Trustees of INSTRAW, issued upon the recommendation of the Consultative Meeting.

The process of updating the survey paper involved a desk review as well as interviews with evaluation officers and practitioners of a number of United Nations organizations. This allowed a wider range of inquiry than had been possible for the initial version. It offered the opportunity to explore some of the new and innovative ways of monitoring and evaluating programmes and projects which, although increasingly disseminated through publications and diverse fora, are not mainstream. This includes approaches and methods developed in the context of self contained programmes, or even individual projects, which are pioneering or innovative.

Particular methods and approaches are mentioned, if not fully described, in the survey paper. In this context, it is appropriate to make some introductory observations on what could be described as the state and the tendencies of evaluation practices across the organizations of the system.

First, there is a distinction in evaluation methods between those applied institution-wide, through an institutionalized system to monitor and evaluate programmes and projects, and those developed with a more limited focus and not adopted into the institution-wide system.

Second, we find that at the organization level, the primary focus of women in development (WID) activity has not been evaluation. The first step in many organizations has been to develop plans or strategies for the integration of women's concerns, i.e. a WID dimension, or, more recently, a gender responsive approach.

Third, whether as part of a comprehensive strategy or in the absence of one, organizations tend to focus first on programme and project designing.

Fourth, the general experience with respect to whether WID considerations are effectively taken in evaluations, and to what extent, seem to be similar independently of the focus of each organization's WID integration efforts.

Strategies may or may not explicitly include monitoring and evaluation lines of action. But, in order to establish whether and in what manner the objectives of a strategy are being advanced, it has been necessary to develop checklists of key questions to follow which in turn are a means of making the strategy operational. Such checklists may be applicable at the identification and formulation phase of a programme or project, or also during reviews and at evaluation.

Considerations of efficiency in reaching the goals of WID integration have determined that some organizations focus on the design phase. In this case, guidelines and checklists have the purpose of ensuring the inclusion of women's aspects in the programme/project design. Given this achievement, these aspects would be monitored and evaluated, since the two processes utilize the objectives and workplan established in the design as reference. However, experience has shown that this may be insufficient, particularly if the intention of the WID design guidelines is not fulfilled, that is, if the design is faulty, not having properly considered women's dimension. It then becomes necessary to develop the evaluation end as well.

The guidelines used, whether addressed to design or monitoring, vary considerably among the different organizations. There are different degrees of inclusiveness, detail, levels of explanation and specificity of instructions. At one end of the scale, is a one-page identification and formulation guideline with questions on whether women do or could work within the project's sector; whether issues of relevance to them are reflected in the project; whether they are direct recipients or beneficiaries, and what numbers of men and women are involved in the project in different capacities. At the other end, guidelines for project design are detailed to the sectoral level and include checklists of baseline information as well as identified indicators (in the categories of resources, activities, potentials and constraints of women relative to men), so that design can be based on gender analysis.

The latter are more useful to evaluators because they provide reference points at different levels for different categories of variables as well as a basis for on-going information gathering with respect to the indicators identified. They also are a starting point for the development of evaluation-specific guidelines. At both ends, application of the guidelines is facilitated or hampered by the degree of understanding of the concepts involved, and acceptance by the staff and consultants that must use them. Furthermore, practitioners of evaluation indicate that in addition to specificity by sectors and types of projects, it is necessary to complement guidelines with practical guides to information, i.e. how to obtain it, where and how to use it.

Therefore, with respect to methodologies that are applicable organization-wide, there is general agreement on the following: the need to develop sectoral and sub-sectoral guidelines, where

needed; the need to sensitize and train staff on WID - or, increasingly, on gender analysis - so as to develop an institutional capacity in this field; the need to address questions related to data; the need to give particular attention to the elaboration of terms of reference for missions and their briefing/debriefing; and the need to consider including at least one WID-trained person in each formulation and evaluation mission.

From the experience with project implementation there emerged, since the seventies, a recognition that the success or failure of programmes and projects tends to ride on the level of involvement of those they are directed to, so that they will be able to sustain activities after the assistance ends. A number of approaches have been tried to obtain this, among which the most recent is the "participatory approach".

Although with somewhat different definitions, the participatory approach has been endorsed by World Conferences such as that of Alma-Ata in 1978, which called for participation to achieve the objective of "health for all by the year 2000", and the World Conference on Agrarian Reform and Rural Development (WCARRD) of 1979. United Nations organizations adopted it in major programmes, for example, since 1977 in ILO's Participation and Organization of the Rural Poor (PORP); in 1980, FAO's People's Participation Projects (PPP), among them the Forests, Trees and People programme, which has published a volume on participatory methods and tools; and in 1983, UNDP's Promotion of the Role of Women in Water and Environmental Sanitation Services (PROWWESS).

The aim of the participatory approach is self-sufficiency. The means is the involvement of people in all aspects of a project: planning, design, and management. This requires building the capacity of the people, the institutions in the community and the government at local and central levels, with the external or project agents playing a facilitating role. It is a design specially suited for the poorest communities, particularly of the rural areas, and for the poorest groups, where women tend to be a majority.

Participation in management means participatory monitoring and evaluation. Monitoring involves the beneficiaries in measuring, collecting, recording, processing and communicating information in an on-going process throughout the life of the project, in its analysis and in making decisions on corrective actions. Evaluation involves the beneficiaries similarly but with a view to regularly analysing the results of the project. These could relate to advance in the achievement of objectives; how the project affects different aspects of the beneficiaries' lives, i.e., social impact; political development, e.g. leadership, access to and control over resources and others; or effects on the environment. Disaggregation of all relevant information by sex permits the determination of participation and its impact on women.

It is also possible to complement the information above with additional information to satisfy the reporting requirements of policy makers, planners and donors. But their needs should not override those of the group. If necessary, the system's information could be supplemented through site visits, participant observations and others.

The participatory approach involves, therefore, a process of learning, a form of education that is non-formal and non-directive, to develop the group's capacity to assume a greater role in their own development. It is a vehicle to self-sufficiency and collective action. The role of project staff is to assist in the development of the productive base, to facilitate access to resources and technology and

to support the development of the most appropriate educational approach and tools (group dynamics, training sessions, drama).

The approach imposes certain requirements and offers a number of advantages over traditional evaluations by outsiders. It requires:

- that the evaluation plan be an integral part of the programme or project implementation;
- the adaptation of national and external agencies, to accept community defined development goals instead of setting targets externally, and to adopt supportive rather than directive roles;
- flexibility in central - country and agency - strategies, budgets and schedules that allows adjustments when the results of monitoring and evaluation signal the need for change;
- sensitization (particularly on gender aspects) and training at three levels: first, the management team, so they can be effective resource persons; second, the group promoters or organizers identified to act as catalysts for group formation; and third, with the proper intervention of the first two, the target group, through a non-directive, participatory process. The project staff's facilitating role must be particularly focused on ensuring female participation, dealing with the extra burden that this may place on women and supporting their enhanced self-assurance and capability;
- continuity of data gathering, analysis and use in a two-way flow between participants and project management, so assessment and adjustment can be a continuous process.

The approach also has advantages and opens possibilities not generally associated with traditional evaluations, for example:

- continuity in data gathering and analysis transforms evaluation into a continuous process, thus, it merges monitoring and evaluation;
- because the participants are data collectors and users, they accumulate knowledge; thus, there is a process of capacity building which ensures acceptability and sustainability;
- for the same reason, there is a built-in brake to the generation of excessive, unnecessary data and a mechanism for effective use of what is collected;
- the approach applies low-cost, simple techniques; e.g instead of a survey to establish baseline information, it uses group profiles with descriptions and interpretations of qualitative data; instead of intermittent quantitative surveys on production, construction, etc., it utilizes informal ones; or brief questionnaires with open ended questions can be used around a particular issue brought to light by the continued recording process;
- it allows the substitution of "situational analysis" for that of impact; that is, instead of a scientifically rigorous, complex and costly analysis of possible changes in the condition of beneficiaries and their environment, it allows the monitoring of changes set in motion by the implementation of a project, not attempting to measure degrees of change but observing alterations in the project context and following the process of their unfolding. Having done this, more complete and scientific impact studies may be designed, as needed, at the end of the project or some time after.

Because impediments to the full integration of women to the development process are related to their lack or unequal access to productive resources and assets, social services, technology and decision making, their participation in project activities, even if these are in areas of their own activity in their own communities, is not a given. The participatory approach provides tools to incorporate

them in the process of formulation, implementation, monitoring and evaluation to a larger extent and with less resource demands than other approaches. Participatory monitoring and evaluation, as the general project approach, can be flexibly adapted to particular target groups and, as has been discussed, can contribute to the development of management skills which is central for the recognition and enhancement of women's productive role.

The approach is also being increasingly utilized, with particular success, in training. A modular, participatory methodology is used which incorporates evaluation from the stage of design of each project activity. It has been adopted by INSTRAW for training in numerous topics, including women in development. Some of them have been developed in cooperation with the ILO/Turin Centre. There is, however, not much experience in applying the approach to a specific women's component within a large mainstream project. This is an area that needs to be explored.

There are a number of publications on the application of the participatory approach, and a few on methods and tools including indicators. It would be useful to take inventory of the experiences and the manuals, training guides and others for rapid reference, particularly for application by countries. It would also be appropriate to study experiences comparatively and develop "sets" of indicators applicable to types of activity, subsectors and sectors.

PART I

REPORT OF THE MEETING

REPORT OF THE MEETING

INTRODUCTION

1. The Consultative Meeting on Evaluation Methodologies for Programmes and Projects on Women in Development was held in New York from 8 to 10 November, 1989. The meeting was organized by the United Nations International Research and Training Institute for the Advancement of Women (INSTRAW) and facilitated by the United Nations Population Fund (UNFPA) which provided the conference facilities.

2. The objective of the meeting was to discuss the elaboration and upgrading of guidelines and methodologies of United Nations organizations for the evaluation of programmes and projects, both mainstream and women-specific, with a view to promoting the integration of women in all aspects and phases of mainstream programmes and projects, and to enhance the development effects of women's projects.

3. The meeting also aimed at furnishing INSTRAW with recommendations for the further development of its programme of activities in the field of evaluation guidelines and methodologies, particularly at the national level.

4. The meeting was attended by 40 participants from 22 United Nations organizations, three regional commissions and three bilateral donor organizations.

A. OPENING OF THE MEETING

5. The meeting was opened by Ms. Dunja Pastizzi-Ferencic, Director of INSTRAW, who welcomed the participants. She pointed out that the cooperation received from the United Nations bodies and agencies reflected increasing recognition and interest in monitoring and evaluation within the United Nations system. She also stressed the use of evaluation as an effective and valid management tool in improving current practices of assistance and in hastening the process of integrating women into development projects and programmes.

6. She expressed the Institute's gratitude to UNFPA for the premises of the meeting and to the organizations that had prepared specific papers for the Consultative Meeting. She then introduced and invited the resource persons, from outside the United Nations system, to present their views on the subject.

7. Mr. Jurgen Sacklowski, Officer-in-Charge of UNFPA, greeted the participants on behalf of the Executive Director, Dr. Nafis Sadik. He pointed out that women in development (WID) was a fundamental concern of UNFPA and highlighted the organization's focus on expanding activities which positively benefitted women. He noted that the Special Unit for Women, Population and Development at the Fund was actively involved in policy and programme and in inter-agency collaboration. Experience with family planning, maternal and child health programmes demonstrated

that unless women's socio-economic status was significantly improved, their position in family and society would remain secondary.

8. Mr. Sacklowski also stressed the importance of evaluating women's dimension in mainstream projects.

B. PRESENTATION OF THE MAIN OBJECTIVES OF THE MEETING

9. In presenting the main objectives of the meeting devoted to the women-in-development dimension in evaluation methodologies, the Director indicated that INSTRAW had launched a long-term research programme related to monitoring and evaluation methodologies for programmes and projects on women in development as mandated by its Board of Trustees in accordance with Economic and Social Council resolution 1987/25. Subsequently, in its resolution 42/65, the General Assembly requested the Institute to promote general awareness of the need to integrate women into policy design which would include the elaboration of special methodologies for monitoring and evaluation purposes. It also requested the Institute to secure the feedback of research results into the operational systems. Accordingly, the first stage of INSTRAW's programme in that field focused on collection of relevant information from organizations in the United Nations system. A survey of the existing methodological approaches was carried out and findings summarized in the survey paper were circulated for the meeting.

10. The Director pointed out that the major objective of the Consultative Meeting was to brainstorm on the improvements needed in current evaluation practices as applied within the United Nations system. But, it should also assist the Institute in providing guidelines for its future research in the area. In view of the fact that INSTRAW carried out its programme in close consultation and cooperation with the United Nations system, the recommendations and guidelines of participating organizations and individuals would be of utmost importance.

11. In presenting the issues for discussion, the Director referred to the problem of definitions. She pointed out that although monitoring, evaluation and appraisal did not cover the same ground, they served similar purposes. They were steps in the process of measuring the relative effectiveness of a programme or project in three spheres: (a) implementation - how the programme was run and what had worked; (b) outcome or results - how the programme or project met its overall objectives and (c) impact - how the programme or project affected end-users.

12. The Director pointed out that it was generally difficult for programme developers to define criteria for programme or project success. This was particularly true with regards to innovative and catalytic programmes and projects in WID. The meeting could, therefore, serve to reinforce the new trend to define monitoring and evaluation as project research or the study of effectiveness and impact of developmental activities.

13. Turning to the purpose of monitoring and evaluation, the Director underlined the importance of securing greater community involvement in programme and project implementation, gaining legitimacy for WID approaches, obtaining more political support from decision-making bodies, increasing financial support and boosting the morale of people involved in project implementation.

14. She remarked that the purposes of evaluation exercises were very relevant for answering the question of who should perform evaluations. Quite often evaluation exercises were perceived as

threatening by project personnel. On the other hand, opting for self-evaluation might introduce bias and those involved might not have the skills required. Generally speaking, external experts had more credibility but, in the case of WID projects and programmes, external evaluators were frequently not familiar with the interdisciplinary and cross-cultural approaches adopted in these programmes/projects. The Director added that evaluation by donors was particularly important for WID purposes since it might generate more resources for the generally insufficiently funded women-specific programmes/ projects.

15. Referring to types of programme/project evaluations as encountered in the technical literature, the Director advocated greater application of formative evaluation, i.e. continuous action throughout project implementation which would require application of such techniques as surveys or needs assessment, pre-testing, observation, interviews, etc., starting with the pre-design stage, as that was relevant for introducing useful changes in the course of programme design, development and implementation.

16. The Director also stressed that it was crucial for monitoring and evaluation to follow an integrated community-based approach, since most WID projects/programmes should be participatory and should be adapted to the needs and culture of the given community without losing sight of the changes to be introduced. She stressed the relevance of developing close interaction with mainstream organizations and the institutions of a given community so as to increase community commitment to the projects which could result in project strengthening.

17. The community-based approach required continuous monitoring as a built-in element of programmes and projects. Monitoring should start from the basis of needs assessment which should include identification of the extent to which present notions on women's roles determine a need to secure attitudinal or behavioral changes. The community-based approach should not only evaluate the outcome of project/programme (e.g. houses built, number of trained persons, etc.) but should also provide information on its impact. In other words, it should evaluate the programme/project effectiveness over a longer period of time.

18. The Director emphasized that impact evaluation must be performed by using both quantitative and qualitative data, including data on social changes which were most relevant for women and development projects and programmes. She expected the meeting to identify the type of data needed and methods to obtain them (such as open-ended questions, interviews, tests, direct observation, etc).

19. Turning to quantitative data as applied in evaluation methodologies, the Director referred to the frequent applications of the Likert Scale type of measurements and stressed that principles of economic analysis of projects and programmes were relevant for evaluation purposes. For example, cost-benefit analysis of rural development projects could lead to project improvement so as to secure increment of yields obtained by women farmers. She noted, however, the difficulty in applying cost-benefit analysis with precision and emphasized the complexity of doing so in WID programmes/projects. She indicated cost-benefit analysis could be useful only if presented in a manner understood by project participants. She invited participants to focus on WID programmes and projects that were evaluated as too costly in terms of narrowly conceived cost-benefit analysis without taking into account wider socio-economic objectives and developmental changes advocated by WID approaches.

20. In conclusion, the Director highlighted the close inter-relationship between project design and the monitoring-evaluation process. She hoped that the process would be based on research in order to prepare effective instruments for wider applications. They could take different forms such as guidelines and check-lists on project designs based on the full involvement of a given community. In closing, she stated project research should be initially applied in selected projects or programmes over a period of time in order to obtain more guidance. Women and development studies provided many such examples but it was now necessary to apply that type of research to mainstream development cooperation within and outside the United Nations system in order to strengthen the methodologies currently used.

C. ADOPTION OF THE AGENDA AND PROGRAMME OF WORK AND ELECTION OF OFFICERS

21. The Director of INSTRAW introduced the provisional agenda and programme of work as presented in document ME/1989/CRP.1. She hoped the participants would brainstorm on the process related to project and programme'design and evaluation.

22. First INSTRAW's background paper would be presented followed by the participants' contributions; then, two working groups would carry out the work of formulating recommendations and suggestions for INSTRAW's future work. She suggested that changes to the agenda should be proposed accordingly.

23. The following agenda was unanimously adopted:

a) Opening of the Consultative Meeting.
b) Presentation of main objectives of the Meeting.
c) Adoption of agenda and programme of work, and election of officers.
d) Presentation of INSTRAW's survey paper "The Women-in-Development Dimension in Evaluation Methodologies - A Survey of Approaches by Organizations of the United Nations system" - Discussion of the paper.
e) Presentation by participants, discussion of appropriateness and applicability of specific approaches and techniques to needs of individual organizations and of national development activities.
f) Identification of areas where further analysis, development and modifications are necessary (CRP.2).
g) Discussion in working groups: Development or improvement of evaluation guidelines and methodologies of United Nations organizations with respect to women in development.
h) Discussion in working groups: Development of INSTRAW's work programme for the next biennium with special focus on national programmes and projects.
i) Presentation and discussion of the conclusions and recommendations of the working groups.
j) Adoption of guidelines for future work and closure of the Consultative Meeting.

24. The Director of INSTRAW then invited the participants to elect the officers of the meeting, i.e. Moderator, Deputy Moderator and Rapporteur. The following officers were elected: Moderator - Ms. Dunja Pastizzi-Ferencic, INSTRAW; Deputy Moderator - Ms. Annika Idemalm, Swedish

International Development Agency (SIDA); Rapporteur - Ms. Meena Patel, Economic and Social Commission for Asia and the Pacific.

D. PRESENTATION OF INSTRAW'S SURVEY PAPER ENTITLED "THE WOMEN-IN-DEVELOPMENT DIMENSION IN EVALUATION METHODOLOGIES - A SURVEY OF APPROACHES BY THE ORGANIZATIONS OF THE UNITED NATIONS SYSTEM"

25. The Moderator invited INSTRAW's consultant, Ms. Mirtha Carrera-Halim to introduce the survey paper on approaches of United Nations organizations to the WID dimension in evaluation methodologies.

26. The consultant indicated that the paper was the first component in INSTRAW's programme for the current biennium on methodologies for monitoring and evaluation of WID. A desk review was undertaken to assess whether and in what manner, a WID dimension had been incorporated into manuals, methodologies and guidelines for monitoring and evaluation of programmes and projects within the United Nations System of organizations.

27. The response to the request for information demonstrated the immense interest amongst United Nations organizations in the issues of WID and evaluation. A wide range of documentation was received such as manuals, methodologies and guidelines and, where they were not available, other materials such as policy statements on WID, papers on WID activities of the organization, sample evaluations, etc. were supplied. It was evident from the documents received that WID activities within the system were extensive, a fact that the paper, in keeping with its narrow focus - WID treatment in evaluation methodologies - did not fully reflect. Furthermore, the findings of the paper do not fully reflect the wealth of experience on the monitoring and evaluation activity that had been accumulated throughout the system. This desk review was not complemented by discussions with evaluation officers and practitioners and, therefore, did not refer to either experiences in the application of methodologies and guidelines or to alternative means of addressing WID issues in evaluation which are not reflected in those guidelines and methodologies.

28. The review of methodologies in the paper was narrowed to evaluation alone instead of including monitoring and evaluation for the following reasons: the concerns and purposes of evaluation as compared with monitoring were broader; evaluation incorporated the results of the monitoring process through which a record of implementation, including corrections and adjustments, was compiled; methodologically, tools required for evaluation must be developed and utilized in the process of monitoring (e.g. indicators of progress/impact that were valid, specific, sensitive and reliable).

29. The consultant elaborated on the more important findings. She pointed out that only 12 of the 30 organizations reviewed had not developed their own guidelines and methodologies although all agencies attached great importance to evaluation and routinely evaluated their regular programmes and projects. In general, they utilized the United Nations Evaluation Manual for those evaluations with modifications and improvements based on their particular needs and experience. With respect to the field activities of those organizations which had not developed their own procedures or guidelines, some utilized UNDP procedures and some, which were research or training oriented, utilized ad hoc methods suited to each individual programme or project.

30. However, the majority of organizations, including UNDP, whose procedures were utilized by others did not include WID issues in their guidelines for evaluation. That probably reflected the fact

evaluation into project design. The group then emphasized that the role of Government and partner organizations in this process is crucial and that a major challenge for United Nations agencies is stimulating and supporting this participation.

36. The importance of building gender issues into project design was stressed repeatedly. When this is done gender-sensitive evaluations are facilitated. However, since women's issues have generally not been built into programme/project design, the scope of evaluation has to be broadened, so effects on women are examined even if they have not been included as part of the objectives. Thus, evaluation can become a tool to assure that future programmes and projects are designed with WID dimensions built into the objectives.

37. Regarding the possibility of evaluating the System-Wide Medium-Term Plan for WID (SWMTEP), it was observed that this would not be feasible and only programmes/projects of SWMTEP should be evaluated.

38. In discussing system-wide implementations of the WID mandate, Cross Organization Programme Analysis (COPA) was noted to be an
instrument that had been designed as primarily a coordinating and monitoring but not an evaluation tool.

39. Several participants pointed out that the ACC machinery, particularly the ACC Task Force on Rural Development, had developed a set of Guiding Principles on Monitoring and Evaluation which had been endorsed and accepted by 26 United Nations organizations. It was suggested that the principles be made operational through an analysis of concrete experiences. It was stressed that the information derived through such analysis be put to common use, so lessons learned would not be lost. In addition, there were general data to be organized and distributed according to users' needs.

40. Some participants mentioned that individual organizations had established internal task forces on WID issues. Despite problems confronted in actually integrating WID into the organizations' programmes, the task forces had proved to be valuable vehicles for awareness creation.

41. Country profiles had been produced by a number of bilateral'technical cooperation agencies. It was useful to promote coordination as well as ensure greater accessibility in the production of such country profiles.

42. In addition, special country profiles were needed for the design of women-specific catalytic projects and WID components in mainstream projects. UNIFEM's profiles were appropriate to the former. For the latter it was important to develop profiles at the sectoral and other levels.

43. Participants recognized the importance of the work by the Central Evaluation Unit and the Joint Inspection Unit. They suggested, however, that WID terminology should be incorporated into the *Glossary of Terms* compiled by JIU.

44. It was agreed that evaluation involved measurement of change and could not be done against a background of absolute standards. The question of change entailed consideration, if not determination, of causality. Given the difficulties of establishing causality, there should at least be an analysis of interrelationships.

45. The group raised the issue of analysing the impact of the adjustment process on women that many developing countries had to undertake. It was felt that the effect of environmental changes on

women needed to be examined; the study of the interrelationships between population, resources, environment and development also needed to be undertaken. All this should be reflected in the efforts related to launching the Fourth United Nations Development Decade.

46. The question of including data on women in long-term projections and modelling was raised and the need to develop adequate methods of achieving such projections emphasized.

47. There was general consensus among participants that UNDP, which had established both machinery and guidelines, should play an important role in promoting inclusion of a WID dimension in project design, implementation, monitoring and evaluation. However, it was recognized that guidelines alone did not ensure adequate attention to WID considerations. The critical element was technical expertise. Thus, since United Nations staff generally lacked both expertise as well as experience in WID issues, the need for vigorous training on WID was emphasized.

48. Training would also respond to difficulties experienced by technical personnel in identifying the relevance of WID to programmes in sectors such as energy, water and technology. The use of action-oriented research on WID could facilitate examining women-oriented elements in the pre-feasibility stages.

49. Some participants emphasized the importance of research and policy analysis for programme and project design, particularly for building in a WID dimension. That underscored the need to establish linkages between policy analysis, an activity performed at headquarters, and technical cooperation, a field activity.

F. PRESENTATION BY PARTICIPANTS AND DISCUSSION OF APPROPRIATENESS AND APPLICABILITY OF SPECIFIC APPROACHES AND TECHNIQUES TO NEEDS OF INDIVIDUAL ORGANIZATIONS AND OF NATIONAL DEVELOPMENT ACTIVITIES

Center for Social Development and Humanitarian Affairs (CSDHA)

50. CSDHA presented a critique of conventional project design and a proposal for new project design. It was observed that project delivery can be slow and cumbersome for reasons such as failure to involve the beneficiaries in project design, inflexibility in execution, lack of monitoring and evaluation, problems in transfer of western ways to non-western cultures, obsession with achievement of short-term efficiency, top-heavy administrative and bureaucratic styles, etc; therefore, they can fail to set in motion a self-sustaining process of development. To some extent, these problems relate to the logic of project planning itself which helps draft good project documents but does not carry them out successfully. Thus, a new design with an epistemological revolution is needed. As a planner is unaware of the many facets of the socio-economic situation, replanning and mutual learning between planners and beneficiaries become considerably important. However, too much planning and too many attempts to control projects can cause them to go wrong.

51. Evaluations deal with impact, effectiveness and efficiency. A good evaluation requires precise goals that are compatible and achievable, a set of indicators to measure impact and a precise list of activities to achieve these goals, i.e. a very tightly and rationally set up project document. However, rationality is difficult to achieve in practice since by the time modifications come to be adopted, they may no longer be applicable or desirable. So, indicators of impact should be developed and updated

throughout project execution. Care should be taken to identify connections between long-term and immediate objectives. More autonomy should be granted to evaluators. Evaluations must be timely and recommendations be given weighage. But all this requires an even greater rationality and control in project design which is not very firm. Therefore, basic components of project design, particularly institutional set-up, must change for participation to be effective.

52. Projects should start with consciousness-raising on WID amongst beneficiaries and institutions before proceeding to the next phase of the project. Immediate goals and activities should be identified during the project's design phase. Reprogramming should be done as a matter of routine at least once a year. In addition, projects should be endowed with a certain amount of non-earmarked funds. Local resources should be mobilized since grants are becoming unusual. Thus, much of the planning should be entrusted to local organizations and project staff.

53. In such designs, self-appraisals should be frequently used and projects evaluated by national Governments as well as international agencies. The larger roles of beneficiaries and project staff as against aid agencies and Governments may, however, be a drawback especially if beneficiaries are not organized.

54. Guidelines and check-lists for evaluations are seldom used by planners or field officers. Professionals competent in WID issues are seldom part of project formulation and evaluation missions. That may be corrected by ensuring WID experts take part in project formulation missions, rewarding compliance with guidelines and check-lists, collecting and disseminating evidence on successful projects wherein women were included in design and evaluation stages, training national planners and enhancing national capacity in data management and information-handling methods.

55. Project goals are selected through negotiations among the different interest groups within the community, so the final outcome reflects the balance of power within that community. If women are not represented or are weakly represented, their interest may be disregarded even if the greatest degree of participation has been achieved. Therefore, they should be strengthened i.e. motivated and organized to express and defend their interests, while project goals are being negotiated within the community. This, an essential task of national machineries, should be assigned to the women's bureaux. Thus, strengthening national machineries through training and information management would ensure sustainability of women's projects.

United Nations's Development Programme (UNDP)

56. UNDP's mandate requires the integration of women in development in evaluations as well as the incorporation of gender issues in mainstream and women-specific programmes and projects. To institutionalize this, a Women in Development Division was established in April 1987.

57. UNDP's evaluation process is decentralized with the objective of assisting Governments, UNDP operational units and field offices in strengthening their capacity to evaluate the programmes and projects in which they are involved. The responsibility for evaluation rests with the regional bureaux and other operational units. Since the system is decentralized, the quality of guidelines and monitoring compliance are critical to the effectiveness of the evaluation process.

58. Evaluation exercises undertaken by UNDP provide critical entry points for gender considerations. The WID Division, in cooperation with the Central Evaluation Office (CEO), has established guidelines to be used in evaluations to determine the extent to which the role of women

has increased, both as participants and beneficiaries in UNDP-financed projects (both IPF and non-IPF). But evaluation of gender issues and utilization of evaluation results to advance WID objectives are fraught with the same problems that permeate evaluations, in general. A study on Governments capacity to monitor and evaluate their own development plans and policies as well as international development cooperation programmes is currently under way. UNDP is also working on a design for Terms of Reference for institution-building, disaster mitigation, grassroots participation, gender issues and expects to have proposals for discussion distributed to partners in the United Nations system.

59. The technical quality of evaluation reports remain uneven. Except for thematic evaluations, at the policy and programme levels, project evaluations have low impacts. The data bank in CEO, built from the results of individual evaluations on a user-friendly system, provides feedback on project performance. About 370 reports have been analysed and data entered in the data bank. Problems in integrating WID in evaluations related chiefly to the lack of technical expertise in class and gender issues in evaluation missions and standardization of relevant issues to incorporate into the various sectors, subsectors, economic branches or programmes, so as to make them gender-responsive.

60. In order to make evaluations a powerful tool with which one may identify the shortcomings of assistance in incorporating gender issues in mainstream programmes and projects, so programmes and projects may become more responsive and effective to women's need, UNDP is analysing and revising existing guidelines to make them more gender responsive. An endeavour to translate them into operational questions and include WID issues in CEO's reports, evaluations and data entry sheets is also being made. Concrete guidelines for 10 sectors have been prepared by the WID Division in collaboration with operational units of other United Nations agencies. By incorporating the WID dimension even from formulation and evaluation stages itself, a participatory approach to development can be evolved which plays a crucial role.

United Nations Population Fund (UNFPA)

61. Since the Fund became operational in 1969, it has consistently emphasized the special role and importance of women in population programmes and projects it supports and has ensured that women have increased opportunities of participation as decision makers and programme planners.

62. In response to the recommendations of the International Conference on Population, 1984[1/], and the Nairobi Forward-looking Strategies for the Advancement of Women, adopted at the 1985 World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development and Peace[2/] several operational measures have been initiated to promote its mandate and policy objectives. In this respect, the Fund has provided considerable financial and technical support to projects aimed at improving the situation of women.

63. In 1975, the Fund became one of the first United Nations agencies to issue guidelines on involving women in population and development activities. These guidelines were revised in 1980 and

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[1/] *Official Records of the General Assembly, Forty-third Session, Supplement No. 8*, addendum, (A/43/8/Add.1).

[2/] *Report of the World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development, and Peace*, Nairobi, 15-26 July 1985 (United Nations Publication, Sales No. E.85.IV.10), Chap. I.

updated in 1988. The updated guidelines identify in detail those specific activities that are considered critical for improving the status of women and expediting their integration into the kind of development process that can be supported by the Fund such as education and training, awareness creation, institution building, skill development, data collection and research. The Fund has also revised its policy guidelines and check-lists for programme development in other substantive sectors that it supports.

64. In 1985, the Fund established a Special Unit for Women, Population and Development now located in the Office of the Executive Director, with the functions of coordinating and monitoring the Fund's WID activities, playing an advocacy role and providing technical backstopping and project support. A major output from the Special Unit is the four-year implementation strategy on women, population and development, prepared at the request of the Governing Council and adopted in 1987. Its objective is "the complete and total integration of women's concerns into all population activities and the increased participation of women in projects supported by the Fund".

65. The Evaluation Branch includes items on the role and status of women in the general terms of reference for all evaluation missions. All evaluation reports discuss findings in this area; those covering country programmes have a specific chapter on women, population and development. "Guidelines for Evaluation of the Women's Dimension in UNFPA-assisted Projects" were developed and issued in 1986. UNFPA in-depth evaluation experience demonstrates that guidelines have enhanced awareness of the issue amongst evaluation consultants, government and agency officials, and UNFPA staff but this awareness has not been adequately translated into programmatic analysis and recommendations in evaluation reports.

66. The guidelines were developed primarily for evaluation of the women's dimension in regular (non-women) UNFPA-supported programmes which may not have immediate and long-range objectives directly related to women. They focus on the three evaluation stages: of programme design, of implementation, and of impact, and raise women-specific issues that should be reflected in the findings, conclusions and recommendations. A study of the extent to which the evaluations of UNFPA programmes and projects carried out since February 1986 have adhered to the guidelines was conducted in 1989.

67. The study found no correlation between the directives given in the mission's terms of reference and its consideration of women's concerns. The women's dimension was incompletely considered in all the project evaluations. The country programme evaluations presented mixed results in terms of their focus on women. The intercountry programme evaluations followed poorly the guidelines, failing to assess women-related activities without further trying to establish the number of women reached, treatment of gender issues, etc. The comparative evaluations presented a mixed picture in terms of coverage on women's issues. The TORs generally required that the women's dimension be considered but reports tended to be brief and general, only exceptionally leading the mission to specific areas of concern in the programme/project being evaluated. It is possible that guidelines for evaluating women's dimension have been viewed as an addition and not quite at the same level as those for other substantive programme areas. Thus, recommendations were made for revising existing guidelines relevant to WID, particularly at the project design stage.

68. Nevertheless, evaluations have revealed important lessons according to a recent analysis of UNFPA Evaluation Lessons Database such as: importance of women's participation in training activities, identifying and utilizing influential women who have access to the power structure in the community, women assuming leadership roles in a project, portraying women in positions of authority

in population education materials, organizing population education activities for couples rather than for individuals, introducing family life education at appropriate levels in the educational system, relating interventions to women's felt needs, project staff's awareness of women's participation and benefit from project activities.

Department of Technical Co-operation for Development (DTCD)

69. There are two types of evaluations in DTCD: ongoing and ex-post. The main objectives of the WID strategy are to advise governments to prioritize projects where women are beneficiaries, to pay more systematic attention to women's integration into technical cooperation programmes, to ensure access to training, to consider women's interests in development activities and to facilitate the employment of women. An objective of the evaluation exercise is to sensitize and demonstrate responsibility and accountability with verifiable goals in order to integrate women's concerns into DTCD activities. The successful implementation of this strategy relies not only on departmental efforts but also on active support and assistance from UNDP resident representative/coordinators and governmental counterparts.

70. DTCD has a Task Force of substantive and programme support officers to promote women's integration in development. The guidelines established by the Governing Council of UNDP, UNFPA and DTCD in 1987 endeavour to implement the strategy to promote the integration of WID. Staff training and support of UNDP resident representative/coordinator and government officials are seen as essential to the full utilization of this strategy. Issues as yet unresolved, although they have been addressed on numerous occasions, include: commitment to WID by senior field managers, an adequate system to identify and modify programme and project designs, a reliable method to identify programme impact on women, minimize possible negative impact and lack of utilization of findings for the identification of corrective methods and dissemination of information to other organizations or programmes. Additionally, women's issues were not viewed as intrinsic to projects and their concerns, as a result of which a majority of programmes and projects were developed without a WID component. Suggestions on holding regular internal and inter-agency meetings, sensitizing top officials and managers to WID initiatives, increasing efforts to develop short and long-term goals and focussing on results rather than on activities have been made.

United Nations Conference on Trade and Development (UNCTAD)

71. Programme evaluation in UNCTAD comprises two mutually reinforcing processes: policy-oriented evaluation at the intergovernmental level and management-oriented internal evaluation by the secretariat. The latter consists of self-evaluations by Divisions and Programmes and internal independent evaluation by the Programme Coordination and Evaluation Unit (PCEU). Internal evaluation focuses on two aspects of analysis: effectiveness of implementation and of outcome. The former is relatively "objective-free", i.e. not directly related to the objectives stated in the medium-term plan; and the latter, the "core" of the self-evaluation exercises, is generally "objective-related". This distinction is important because it is possible to achieve a high rating in terms of the former and yet have a low rating in terms of the latter. The procedures for self-evaluation entail the completion of a worksheet and preparation of a Self-Evaluation Summary Report for each subprogramme. They incorporate the basic features of internal evaluation as well as reflect various improvements drawn from the experience already gained. The Self-Evaluation Summary Report should provide a clear statement of the core or major issues: main accomplishment, major difficulties and recommendations.

72. Following a self-evaluation process, an independent evaluation is made by the PCEU on the basis of the complete report of the study. The PCEU is also entrusted with responsibilities of organizing and undertaking any cross-sectoral evaluations, as appropriate, and supporting intergovernmental bodies. The Self-Evaluation Summary Report, together with the independent assessment by PCEU, are submitted to top management for consideration of results and follow-up action. The results of the process are used, by appropriate services, for future programme planning and programme budgeting exercises. The management process also includes a system of internal review meetings to plan and monitor the secretariat's preparations for major intergovernmental meetings as well as to assess their results. While specific results of management oriented internal evaluation are for internal use, the secretariat, in keeping with its commitment to Governments and in response to intergovernmental requests, makes available a short summary of the Self-Evaluation Summary Report to the Board and, as appropriate, to the main Committee concerned for their information.

United Nations Centre for Human Settlements (Habitat)

73. Habitat activities for the implementation of the Nairobi Forward-looking Strategies for the Advancement of Women include training for women's machineries and ministries of human settlements to promote women's participation in human settlements development and management. A series of Regional Seminars have been organized between 1986 and 1989, and lessons from national and regional experiences in promoting women's participation in human settlements development and management have been identified. Training seminars have been organized, and training modules and reports have been prepared. The Global Strategy for Shelter to the Year 2000[3/] and its plan of action was adopted first in the Commission on Human Settlements and the General Assembly[4/]. An assessment of women's needs in shelter and infrastructure is being undertaken, with special emphasis on the collection of statistical data. In support, the Habitat International Coalition of Non-Governmental Organization created a Women and Shelter Group in 1988 and issued a plan of action that specifically focusses on women and shelter issues, so as to ensure that women's concerns are incorporated into all national and international shelter programmes and activities.

74. Habitat has developed a check-list of Indicators for Assessing Women's participation in Human Settlements Development Strategies to ensure that women's issues are incorporated in the Global Strategy for Shelter to the Year 2000. The check-list includes:

a) Indicators of Women's Status related to social conditions and factors which affect women's access to decent shelter and services;
b) Indicators for Strategy Formulation (or Design) and Planning;
c) Indicators for Strategy Implementation (Programmes) and Monitoring; and
d) Indicators in Strategy Performance and Evaluation.

75. These indicators are in line with the implementation and monitoring of the Global Strategy for Shelter to the Year 2000. In the Technical Cooperation Division, the objective is to achieve the

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[3/] *Official Records of the General Assembly, Forty-third Session, Supplement No. 8*, addendum, (A/43/8/Add.1).

[4/] See General Assembly resolution 43/180 of 20 December 1988.

inclusion of women's issues in the project cycle (design, monitoring, reporting and evaluation). As the TCD Division of UNCHS (Habitat) is following the UNDP Programme and Projects Manual as guidelines for project formulation, monitoring, reporting and evaluation, it is using the women's questionnaire prepared by UNDP.

World Food Programme (WFP)

76. A set of four documents, to be read in chronological order, were presented by WFP: "Food Aid Strategies for Women in Development", March 1987; "Development and Implementation of built-in Monitoring and Evaluation System for World Food Programme-Assisted Projects", March 1987; "Sectoral Guidelines on Women and Development: Gender Variables in Food Assisted Projects", April 1989; and "Comparative Review of Assisted Projects in Latin America Focussed on Women" (Projects Bolivia 2313, Guatemala 2581, and Peru 2341), October 1989.

77. These documents reflect a step-wise progression in the institutionalization of WID concerns and improved project monitoring and evaluation procedures as well as highlight the important interrelationships and substantive linkages between them.

78. The first document is WFP's formal WID policy statement to its governing body. The second and third focus on the development of built-in project monitoring and evaluation schemes; they furnish the WID guidelines for major sectors of development activities by which the policy is operationalized. The fourth document presents the outcome of a recent comparative evaluation of three projects in the Latin America region that was undertaken to assess project performance and results. This information serves as input to improved project design and management, as possible adjustments and improvements in existing sectoral guidelines and check-lists, and WID evaluation policies and practices.

79. In WFP, the basic texts, mechanisms and machinery pursue WID objectives and improve project monitoring and evaluation. The challenge that remains is one of broader application of what exists at the actual operational level. The time has arrived to practice what is being preached, to further learn by doing and to proceed in concrete terms in concrete situations. Further discussion of general concepts, policies and intentions are only of marginal value and can at last, since the beginning of the United Nations Decade for Women in 1975, be put to rest.

80. WFP recognizes that the significance of women for attaining national development and food security objectives, supported by food aid projects, is not limited to their role in reproduction and the organization of household level food consumption but extends to production in all sectors. Therefore, it requires projects to be assessed with regard to their direct and indirect impact upon women's activities, output and incomes in the targeted area. Specifically to be reviewed as to whether they contribute to strengthening or undercutting major areas of women's economic activity and, if the latter, whether they provide support for alternative employment that maintains and expands women's outputs and incomes. Accordingly, five general guidelines have been identified in developing gender-responsive development projects:

a) Every project activity should be assessed in terms of its impact upon female (as compared to male) producers and the provisions it makes for enabling women to gain access to project resources and services and to participate in project activities;

b) Anticipated effects (direct and indirect) on female income and production should be included as a major component of cost-benefit analysis;

c) Project inputs and delivery systems should be tailored in a manner that is responsive to women's requirements, resources (including labour-time), activities and possibilities;

d) Emphasis should be placed on integrating women into mainstream activities involving the acquisition of economically significant production resources or skills;

e) A "women-only" project or a "women's component" can normally be justified only if it meets the following conditions: it is conceived as a bridging strategy to bring women to a threshold level from which they can enter mainstream activities; it is supported with adequate technical and financial resources; it is structurally linked to major sectors of activity and is time-bound in its execution, viz. attaining the threshold level and linking up with mainstream activities.

81. In an effort to institutionalize gender response and other more effectively targeted interventions, particularly for the low-income population, several "lessons learned" have already been identified, some of which are reflected in the comparative evaluation report. These lessons point to the need for qualified staff to provide hands-on support, the need for further concrete government and WFP action to apply existing guidelines and to demonstrate by performing; and the pervasive need to generate sensible and sensitive primary data at reasonable cost through the direct involvement and participation of intended beneficiaries.

United Nations Institute For Training and Research (UNITAR)

82. The representative of UNITAR mentioned that, as with other social problems, there is not enough empirical evidence on the interaction between different variables. This is true of the interaction between productive and reproductive functions of working women, particularly in view of the growing importance of adolescent pregnancy. Therefore, sophisticated analyses and such indicators as they may have devised, with the cooperation of the health (WHO) authorities, are needed.

83. Also, the relationship of the environment and WID does not seem to be sufficiently documented. On the one hand, there is little doubt that the degradation of the environment aggravates the burden of women in terms of the income and time required for discharge of their tasks. On the other hand, experts do not seem to have empirically established population growth as having a deleterious effect on the environment, although, of course the theoretical possibility exists.

84. Generally speaking, in terms of "evaluation" maximum effort should be devoted to monitoring the change that occurs as a result of programmes. Standards differ so widely from country to country that it is not of great help to conform performance with some kind of normative indicator.

United Nations Development Fund For Women (UNIFEM)

85. UNIFEM expounded on its Knowledge Bank project, which was initiated in 1983 as a response to consensus that emerged from an in-depth review, started in 1980, of projects it funded on the need for a system that would facilitate storage, retrieval and updating of project data to share project experience.

86. The Knowledge Bank produces three levels of output. The first, Project Information Baseline Data makes use of normal procedures of project documentation and monitoring currently used by UNDP and other developed agencies (e.g. project document, progress reports, final report, etc.) plus additional documentation to place a given project in context (i.e. country profile, community analysis, participants' profile). The second level, ongoing monitoring/impact data contains abstracted cumulative baseline data. The third, Impact Data, produces consensual ratings or rankings of completed projects by three-person committees of expert evaluators in accordance to certain criteria.

87. The results retrievable from a personal computer are appropriate for comparative and trend analysis of selected categories of project or of the Fund's total project portfolio. That Bank also can provide, as by-products, descriptive or quantitative information on specific questions (e.g. how many are participating in a given activity/sub-activity in a given country or region, how an activity ranks in accomplishing its overall expected effects, etc.).

88. The Bank's impact and trend analysis and ongoing impact information can provide systematized yet flexible service to policy and decision makers, to programme officers and field managers and to the Fund's administrative support system. The information permits matching a project's objectives and workplan with available resources; it provides information on questions such as technologies and their application, methods and approaches including project design and workplan by a number of cross-references; it facilitates information transfer between programme officers, field project managers and executing agencies; it flags ongoing accomplishments, unexpected consequences, problems and solution processes and it gives quick access to current and cumulative project factual and status data outputs. External users can add their experiences to the Bank in an agreed upon manner or adopt the system as a whole.

United Nations Educational, Scientific and Cultural Organization (UNESCO)

89. UNESCO's evaluation system has evolved around two principles: evaluations should be fully integrated into planning, programming and budgeting process, and should be carried out, in the first instance, by those most directly involved at the programme implementation level. Therefore, emphasis has been placed primarily on evaluation of a decentralized and self-evaluative nature but also on the need to identify networks and linkages to feed the existing data on WID issues to the evaluation and planning units, on analysis of women's development plans to identify if clear objectives, programmes and evaluation strategies were incorporated, and on the need to develop methodologies for:

a) Integrated planning to allocate issues promoting women's advancement;
b) Approaches to secure the commitment of decision makers and top-level management to introduce these methodologies and maintain them continuously;
c) Sensitizing planners and programmers to women's issues;
d) Sensitizing societies on women's issues through innovative national involvement by innovative means, such as audio-visual programmes and radio programmes;
e) Identifying the sustainability of results at the design stage and corrective actions during mid-term evaluation of the project rather than after.

90. UNESCO underlined the importance of seeking member countries' commitment to sustainability after external assistance ceases. Further, the need to introduce training elements to

incorporate relevant approaches on sustainability during monitoring and super- vision of projects/programmes should be highlighted. The existing guidelines and methodologies for evaluation of programmes/projects within the United Nations system, with a focus on WID in areas of special concern to individual organizations, are to be reviewed and the following considered: specification of goals; effectiveness and appropriateness; networks and linkage needed to feed-in data on WID issues; inclusion of evaluation strategies in development plans; need to increase gender awareness of planners and develop capacity for gender planning; routine analysis of WID indicators; consolidation of indigenous informal WID networks; building sustainability, identification of corrective actions to be taken during life of the project through mid-term evaluation.

International Fund for Agricultural Development (IFAD)

91. IFAD's mandate to assist the rural poor in developing countries through project lending on concessional terms implies particular attention to the monitoring and evaluation of project inputs, outputs, effects and impact on designated beneficiaries. The *Lending Policies and Criteria* specify that all IFAD projects should include provisions for monitoring and evaluation through monitoring and evaluation units at project or programme level. As explained in further detail in the document *IFAD's Evaluation System and Procedures* , made available at the meeting, IFAD also undertakes mid-term, completion and theme evaluations of the projects it assists. The terms of reference of mid-term evaluations include project effects and impact on women inclusive of projects in which women are not explicitly identified as beneficiaries. As with mid-term evaluations, completions include an assessment of the role of women as well as the advantages and disadvantages from project activities. These evaluations are undertaken on the basis of all projects in sectors of specific concern to IFAD in order to draw lessons for future programming in the particular sector.

92. Monitoring and evaluation of women and development in IFAD lending, therefore, forms an integral part of the target group focus of monitoring and evaluation. In order to strengthen further the evaluation with respect to WID, recent IFAD efforts include the use of specific terms of reference regarding women in the project, selection of consultants for project design and evaluation with particular expertise in WID issues and participatory evaluation techniques, and eight ongoing case studies to provide models of how to reach women in IFAD assisted projects.

93. It is expected that the focus on improved monitoring and evaluation of WID issues will also entail important findings applicable to programming and evaluation for other marginal groups, such as the landless, small scale fishermen, nomads and tribal populations that also form part of IFAD's target group.

International Labour Organisation (ILO)

94. ILO's mandate requires that the full integration of women be promoted in technical cooperation activities. However, the organization is still at an experimental stage when it comes to incorporating the gender aspect into evaluation work.

95. A comprehensive project design system is applied to all ILO technical cooperation projects by staff at headquarters and in the field. Special emphasis is placed on improving design procedures taking into account concerns such as the link between technical cooperation and international labour standards, environmental issues and WID.

96. ILO's emphasis on support for all WID activities related to technical cooperation is reflected in the creation of six new WID posts and regular budget support for WID activities.

97. A WID session is incorporated into ILO's regular project design courses, in which a simplified gender-analysis methodology is being used. In addition, a set of guidelines on how to integrate women's interests in projects is currently being tested. Other efforts to ensure women's visibility at the project planning stage include the incorporation of the gender aspect into the terms of reference used for project identification missions and development of job descriptions for technical project staff that include a gender-specific reporting-back women.

98. ILO procedures for evaluation are to be revised with a view to ensuring that a maximum of projects are evaluated by project management. There are internal (self) evaluations and in-depth evaluations of sets of projects with similar themes, for instance of all ILO technical cooperation projects concerning women.

99. Guidelines for evaluation missions cover cultural and socio-economic aspects of the target group, e.g. the status of disadvantaged groups, shifts in patterns of work (including domestic work), food security, kinship and family structure, human rights, leisure and popular participation, all of which should be determined by gender, where possible. The importance of identifying particular conditions (amongst the target group) that should be specifically considered in planning future projects is also stressed.

100. ILO's experience demonstrates that it is best to incorporate the gender aspect from the planning stages: obtaining and collecting data on women's roles as indirect or direct participants and beneficiaries in ongoing mainstream projects; evaluating almost completed projects to see how women have benefitted from the project (directly or indirectly), and how this corresponds to the description of women's anticipated participation in the original project document; and developing sector-specific indicators for evaluating a project's impact on women, all of which are to be incorporated into overall evaluation terms of reference. ILO does not support WID-specific guidelines in evaluation work.

101. ILO suggested that INSTRAW identify a set of successful mainstream projects that ensured women's participation. The information should also include a description of the methodologies used, how they were chosen and why they worked.

International Centre for Advanced Technical and Vocational Training (ILO/Turin)

102. The International Centre for Advanced Technical and Vocational Training, better known as the ILO Turin Centre, is one of the largest residential training institutions in the United Nations system. Recently, many of its training activities have aimed at promoting women's participation in the development process. The Centre's planning of tailor-made training activities starts from an analysis and examination of implications of development process in various regions, in terms of new competencies, job profiles needed and the consequent training needs. Following the identification of such needs, an evaluation is necessary to establish priorities. The Centre uses three types of evaluations: evaluation of training needs, evaluation of the learning process and impact evaluation.

103. Under evaluation of the learning process, the modular approach is utilized. It consists of evaluation at the entry level, module by module at entry and exit levels, of practical activities for each

module and a final evaluation at the end of the course. The evaluation of impact is conducted through a follow-up seminar on activities assigned to participants in their countries. Foreseeing a follow-up improves student performance and course results. Follow-up seminars show several external environmental factors influence the results of learning which with women are often of greater importance due to unequal opportunities in decision making. The Centre is developing complementary training materials on WID/gender approach for integration in the multimedia package on management of technical cooperation projects. A course entitled "Design of Training Programmes for Integration of Women in the Development Process" is also under way. A training package on considering the WID dimension in all phases of a project is expected to be developed in collaboration with ILO headquarters in early 1990.

Economic Commission for Latin America and the Caribbean (ECLAC)

104. Although ECLAC has no Evaluation Unit or Evaluation Division, it participates in evaluation exercises when financial sources or donors who conduct such evaluations invite their collaboration. Therefore, no specific methodology has been developed.

105. The Operations Division is responsible for supporting substantive divisions in all stages of a project's cycle, i.e. formulation and design, negotiation of approval, starting of activities, monitoring, implementation and delivery of inputs as well as reporting. It usually relies on the UNDP rules and guidelines. Projects are reviewed by a Project Committee before submission to extra-budgetary financial sources.

106. Women and development is covered by an active Unit for Women that is part of the Social Development Division. The role of the Unit is mainly to support the preparation and organization of the regional conferences for women and development (four conferences have already been held), to prepare background material, reports and research for these conferences and their preparatory meetings, committees and sessions, and to carry out or supervise the implementation of some regional projects focussed on women's issues which are financed by extra-budgetary funds.

107. In spite of this active participation and presence of the Unit in regional and national activities relating to women and development, there is no institutionalized coordination or interaction among the Unit and other divisions. No representative of the Unit participates in the Project Committee to detect or introduce a women's dimension in newly formulated technical cooperation projects.

108. As the first step towards improving this situation a representative of the Operations Division has been sent to this meeting. Specific recommendations and suggestions on ways of integrating women's dimension into all regular activities of ECLAC have been invited, so concrete achievements may be reported at the next meeting.

Economic and Social Commission for Asia and the Pacific (ESCAP)

109. ESCAP recently carried out a self-evaluation exercise of WID activities, mainly publications and workshops, through a questionnaire survey. WID activities fall under two subprogrammes: popular participation and social development policies and coordination.

110. The response rate was not very satisfactory. However, the comments were gratifying although not particularly helpful in assisting the WID section in improving its output. The responses were more helpful regarding workshops. The relatively low participation rates may have been due to any or all of the following reasons: the long time-lapses between delivery of outputs and the evaluation; lack of time to send reminders; failure to reach some of the identified end-users; in case of publications, the mailing list consisting of institutions where end-users were difficult to identify; many end-users were busy and unable or disinclined to complete the questionnaire. The disappointing returns of the questionnaire survey contrasts with the fact that ESCAP receives an average of 20 letters per week from individuals and organizations desirous of accessing ESCAP publications or services. Thus, it appears that a questionnaire survey is not adequate as a means of evaluating output. Other means are required, for instance, a charge in the form of exchange materials may be levied for publications or a more carefully designed and administered survey could be conducted through interviews.

111. For WID programmes and projects there is a need to devise an evaluation methodology which would capture the impact or usefulness of outputs. The current evaluation methodology of the United Nations is rather weak and the medium-term effects are most difficult to assess. Furthermore, given the United Nations programming procedure, which considers only "final outputs" in its man-month allocations, the evaluation exercise is not built into ESCAP's work programme. There are also difficulties in incorporating the results of evaluations in ongoing and planned activities.

International Research and Training Institute for the Advancement of Women (INSTRAW)

112. During 1988-1989 INSTRAW organized numerous training seminars and workshops on various subjects for different target audiences. In these workshops, different methodologies and techniques were applied with the objective of training trainers who could, in turn, transfer training techniques within their own countries and communities. Priority has been given by INSTRAW to the non-conventional multimedia modular-training methodology which requires well-defined objectives, target groups and pedagogical schemes on the basis of which packages have been prepared. Evaluation techniques have been one of the crucial components of INSTRAW training materials, modules and manuals.

113. A formative evaluation of three aspects has been conducted before finalizing the training materials and audio-visual aids: subject-matter (context), instructional design and technical presentation. The evaluations reviewed factors such as content accuracy, comprehensiveness, objectives, sequence and relationship of ideals within context, technical quality and media compatibility of materials with the training programme. In order to test the content, training packages and participants' comprehension, two types of evaluation forms were used, one during and one after each training session.

114. A different form of evaluation has been used to assess the effectiveness of the training workshops: indicators to measure levels of interest, participation, press coverage, etc. as well as the quality of content of the training modules. Scale ratings (Likert scale) by end-users/participants were used to evaluate the timeliness and usefulness of the modules and their objectivity, comprehensiveness and responsiveness to the needs of the recipients. Survey questionnaires and aggregated analysis were used because of considerations of practicality and cost.

115. In 1986, INSTRAW developed training materials based on the WHO Minimum Evaluation Procedures for considering the benefits to women in the evaluation of projects. Between 1987 to 1989, 300 participants were trained in five African countries and the ESCAP region. Their suggestions for the improvement of WID project evaluation procedures were included in the reports of the training seminars. An analytical study on the feedback was expected to be finalized in 1990. A sound-slide package on the Minimum Evaluation Procedure adapted for the training seminars was presented to the Consultative Meeting.

116. Guiding principles for the development of community based-approaches and of guidelines/checklists were also presented by INSTRAW: evaluation is a built-in integral part of a programme or project; evaluation is a management tool and its use for accountability is secondary; given the complexity of issues resulting from women's limited access to resources, decision-making and benefits of programmes and projects, special, sophisticated evaluation techniques are required for evaluating the women's dimension in programmes/ projects. However, this runs the risk of resources available for the implementation of programmes and projects being absorbed by the evaluation exercise. Therefore, alternatives need to be sought bearing in mind that any evaluation is better than none; the application of the paradigm of self-reliance methodologies for the development of community-based approaches to evaluation should be given particular attention. This approach has proved valuable to secure the participation of women from the early stages of programme project identification. This could be achieved through gender-unbiased definition of target groups, formulation of criteria for success, collection and analysis of data, etc. The community-based self-reliant approach for evaluating the WID dimension in programmes/projects may also prove valuable in solving other problems related to the linkages of micro-level implementation and macro-level national policies and international strategies; for example, who defines context, determines objectives and their translation into a plan of operation, who defines the organizational framework and sets the criteria are capable of pointing to unintended consequences as well as desired results. It can also permit monitoring and measuring consequences, desired results as well as long-term effectiveness of outputs, even beyond the lifetime of the activity that generated them. Application of the self-reliant approach requires, however, training on at least four levels: members of the target group, suitable group promoters/organizers, members of implementation/management team and the extension workers. Women must be present in all three groups.

117. A rudimentary list of issues to be addressed in evaluation exercises, based on the application of the self-reliance approach, was organised into the Standard Logical Framework Matrix. The matrix shows, vertically, long-term and immediate goals and objectives, activities and outputs and, horizontally, verifiable indicators, means of verification, assumptions and external as well as circumstantial factors which may influence results and impact.

Swedish International Development Agency (SIDA)

118. SIDA's experience has given rise to concern about evaluations that fail to address the effects of projects on people and focus instead on technical and operational issues. It points to a number of conclusions that can help plan better evaluations.

119. If sector support is evaluated only against the goals of development assistance, the impact on women is usually ignored.

120. The gender composition of the evaluation team has a bearing on their perspective and affects the likelihood that WID issues will be addressed. The experience is that an evaluation team member with special competence in and responsibility for the inclusion of women's aspects in the evaluation has to be appointed in order to ensure that women's aspects are taken into account.

121. Evaluations pertaining to certain sectors such as agriculture, health, water, population and education include more frequent references to women. However, the lack of specific operational guidelines and tools have constrained evaluators' efforts in addressing WID issues. Besides, the lack of baseline information is a serious constraint to evaluations. Further, attempting to reconstruct the pre-project scenario at the ex-post stage is extremely difficult. The lack of target group analysis and baseline data hinders the establishment of causal relationships and assessment of "change".

122. Decentralization of evaluation activities constrains the degree to which focus of project evaluations can be influenced. It is important to consider potential unintended effects of development activities, both positive and negative. Evaluations that focus only on objectives and achievements may miss important unanticipated results. This is particularly true in structural adjustment which can often have a deleterious effect on the poor and on women. In order to plan meaningfully for women as a target group, their needs and concerns have to be considered and their participation in WID experience is a necessary prerequisite for adequate planning.

Norwegian Ministry of Development Co-operation (NORAD/MDC)

123. Over more than a decade, a main concern for Norwegian development efforts has been their human and social dimensions. Experience in evaluations of gender concerns reveal that WID issues still have a certain "natural" affinity reflecting our own cultural construction in certain sectors such as health, family planning and education. The partial understanding we have of gender issues and their relevance for all levels of society and multisectoral aspects of planned change has been highlighted in the first round of country studies undertaken. From this experience, there emerged a challenge to develop much more consistent and refined evaluation methods that cope with the three most serious shortcomings: the bias towards the project and programme level, the lack of operationalisation of the category "women" and an imperfect understanding of the interrelation between improvement in women's conditions and the necessary related structural changes. Another lesson learned was that WID-sensitive checklists (both general and sector-specific) might be helpful, particularly in designing and regular monitoring, but are certainly not a solution to the problem of integrating gender concerns in the various types of evaluations.

124. NORAD's strategy for evaluation is based on an innovative and flexible policy instrument, "Conference: the Women's Grant Desk Study Review" Oslo, 1989. It focuses on the following elements:

- The strengthening of monitoring and evaluation units of the respective organizations where expertise on the socio-economic impact of specific groups including gender differential effects is to be collected.
- This strengthening of the capacity for self-evaluation does not eliminate the need for external evaluations.
- The use of local expertise and a participatory approach is significant.
- More attention is to be paid to mechanisms for institutional learning.

- Popularization of evaluation results (for example Norway's country studies consist of a main version, a separate appendix, a short version for the public and a very short summary for the media).

125. Other conceptual and methodological issues of concern include the following:

- The GAD (gender and development) perspective is more fruitful for translation into monitoring and evaluation than the WID perspective.
- A more or less exclusive attention to evaluation of projects and programmes, and less to policy and other aggregate levels, might marginalize the gender dimension of development.
- There is an urgent need to clarify the interrelationships between changes in various types of women's practical needs and change in their overall position (i.e. a clarification of how sub-goals can be translated into, or realize, the main objectives of WID/GAD).

Canadian International Development Agency (CIDA)

126. CIDA adopted a comprehensive WID Plan of Action 1985-1990 as an implementation strategy for the WID policy introduced in 1984.

127. Specifically, the five-year plan of action identified the following activities related to WID and evaluation:

(i) to integrate WID into project and programme evaluations;

(ii) to develop guidelines to assist evaluation teams responsible for planning/conducting project evaluations;

(iii) to integrate WID into CIDA's major corporate evaluations of sectors and policy themes;

(iv) to undertake an evaluation of the WID Policy and Plan of Action at the end of the five-year period (1991)

128. CIDA was compelled to respond to these directives and also to the growing evidence which suggested that evaluations did not address the role of women. Furthermore, CIDA officers continued to petition for specific guidelines on "how to" implement WID policy.

129. In response to incentives for integrating WID into mainstream evaluation activities, CIDA has employed the following strategies:

(i) Development of tools and guidelines: after a cursory reference to WID in general evaluation guidelines (1985), CIDA developed specific "Guidelines for Integrating WID into Project Design and Evaluation" 1986 and refined these further in "WID and the Project Cycle" (draft 1989). CIDA's experience suggest that guidelines must be short, "user-friendly" and directly related to context of operations. Furthermore, they should be "introduced" in a workshop to improve their dissemination and utilization;

(ii) Formal integration of WID into project planning process: A "WID Annex" designed as a management tool for planners helps clarify the project's potential for participation/effects. It can be used at evaluation to establish baseline indicators;

(iii) Training of CIDA officers in WID sensitization and social/ gender analysis, including monitoring and evaluation;

(iv) Working with partners to ensure they (Canadian executing agencies, consultants, Canadian/local NGOs, local government officials) understand WID policy and CIDA's expectations. This is accomplished through training and information sessions that specifically address monitoring and evaluation;

(v) Ensuring that terms of reference for evaluation studies explicitly outline CIDA's expectations regarding the conduct of the evaluation specifically related to WID;

(vi) Ensuring that evaluation teams include WID expertise for which a roster is continuously updated;

(vii) Engagement of local expertise for evaluation missions;

(viii) Feedback of evaluation results related to women through periodic reports on "lessons learned", annual synthesis of evaluation findings related to WID, Development of CIDA-specific case studies and presentation of key findings to senior management, parliament and the public;

(ix) Development of women's country profiles which can be used in a limited fashion to establish baseline data on the general status of women, and

(x) Moving beyond the discrete project level to evaluating the WID policy and plan of action: an evaluation of the implementation of the policy is scheduled for completion in 1991. It will assist CIDA in developing a strategy to carry its WID policy into the 1990s.

United Nations Children's Fund (UNICEF)

130. The evaluation chapter of UNICEF's policy and procedures manual was being revised. However, "Guidelines for Women's Programmes" has been available since July 1989. The Evaluation Office was completing the revision of the chapter on evaluation and monitoring of the field manual to include recent developments in techniques and methods of evaluation such as mobilization and social services. The Evaluation Office was also finalizing the preparation of an evaluation guide to complete the field manual which will concentrate on the "how-to"s of evaluation. Regarding the process of evaluation exercises, the following points were made ready:

a) Confirming the highly decentralized system of operations, the responsibility for initiating programme or project evaluations and for lending support in execution to the Governments receiving assistance rests with field offices;

b) The Evaluation Office at headquarters is responsible for the development of the system, including guidelines, training reviewing, commenting and reporting on evaluation;

c) Field offices may conduct evaluations with the Government and not in lieu of Governments that are unwilling or unable to do it; they may also conduct evaluations on behalf of funding agencies if so requested and the Government has agreed. Field offices and headquarters may select evaluations on the basis of certain thematic priorities alone.

131. In broad terms the approach is at the project level. A very rough estimate of the number/proportion of women beneficiaries is part of the documentation of any UNICEF-assisted project. It does indicate, however, there are women beneficiaries, in which sector and the order of magnitude. At the country programme level, women's issues are part of the annual and mid-term review meetings and reports thereof and are part of annual progress reports (country level monitoring). Globally as an organization the Executive Board of UNICEF every year reviews a report by the Executive Director about the progress on women's issues.

132. UNICEF has both women-specific projects and/or women's issues integrated in development projects in other sectors. It has determined a very special focus on young girls and women and on reducing disparities between boys and girls in all sectors in addition to special attention to women in programmes on maternal mortality not previously identified, Tetanus Toxoid immunization and women/girls literacy and poverty. UNICEF programme strategies for the 1990s have been under development in the last 12 months and will be presented to the UNICEF Executive Board in April 1990. The women and girls development issue will constitute an important part of the strategy in all sectors. The Evaluation Office will be conducting thematic evaluations on women's projects in all regions in 1990 as part of its work plan.

United Nations Industrial Development Organization (UNIDO)

133. UNIDO informed the meeting that its mandate is to systematically integrate women in all phases of technical cooperation programmes and projects using a public sector approach. The operational approach to this integration has been stipulated in its "Guidelines on the Integration of Women in UNIDO Technical Cooperation Projects and in Industrial
Studies Programmes and Research" issued in 1986 for use in conjunction with the existing project formulation guidelines.

134. The application of the 1986 guidelines demonstrated they were too generic and broad, and that the level of staff understanding of the WID concept had to be raised. Consequently, the General Conference endorsed a Special Programme for the Integration of Women in Industrial Development 1990-1995, which is systematic and cross sectoral and includes staff sensitization, revision of guidelines and operationalization of application at headquarters or the field.

135. The Programme is expected to continue for the longer term and to result in routine gender specific programming from the outset of the project cycle all the way through to evaluation. Presently, the focus is on project design. Therefore, special missions for specific projects have been organised, combining evaluation and formulation. Based on their results, lessons learned are being compiled and measurable indicators specified. They will be utilized to develop guidelines for both formulation as well as for monitoring and evaluation.

136. Corresponding to the above process, the first step in its institutionalization has been the establishment of a special unit for the Integration of Women in Industrial Development within the Industrial Funds Mobilization and Cooperation Branch. The Unit works in coordination with the

different divisions and, as it develops its plans, it expects to do so increasingly through the placement of technical experts with a WID expertise in each of them.

137. From general experience in technical cooperation, in applying the 1986 guidelines and compiling lessons learned, the Unit recognizes that the development of guidelines and other materials must be systematized within a general planning framework for the complete cycle of technical cooperation. Its development is presently in the stage of determining the information requirements.

138. Based on experience, it also has been determined that planning frameworks must have two levels. First, a project context level including the physical and economic set-up, legal and political aspects, type of interventions and approaches to WID by the project, etc. Second, a level of project specific aspects to be examined and indicators to be used, so as to establish progress, performance and achievement in those aspects throughout implementation and impact after completion.

139. The structure of the framework points to the fact that the most crucial stage in the cycle is that of formulation and design. The structuring of information and issues to be examined during implementation and evaluation stages will be greatly facilitated by the correct design and formulation within the completed framework.

United Nations Statistical Office (UNSO)

140. UNSO informed the meeting about a prototype data base on WID developed in cooperation with UNFPA and on the basis of research done by INSTRAW. The data base was particularly designed for application on mini-personal computers and was relatively user-friendly. Currently, it was distributed to interested countries and organizations. The Compendium of Statistics and Indicators on the Situation of Women, 1986, gave a cross-selection of the data base and, therefore, an idea of its structure and content.

141. Technical problems regarding the data base have been solved for the most part. The remaining problems were organizational, mainly related to user-producer links. Particularly reference was made, in this context, to the development of national WID data bases and the need to provide training and service to end-users.

142. UNSO is currently discussing the linking of the WID data base to evaluation systems of United Nations organizations and some bilateral organizations of donor countries. Though not presently feasible, it should be strongly promoted in the near future.

Food and Agriculture Organization of the United Nations (FAO)

143. The Plan of Action for the Integration of Women in Development, recommended by the Twenty-fourth Session of the Conference (resolution 3/87) and unanimously adopted by the 94th FAO Council in November 1988, constitutes the framework for FAO activities. Its comprehensive, multifaceted charter identifies measures to be taken in civil, economic, social and decision-making spheres.

144. Two categories of priorities identified are programme and administration. The former cuts across technical units requiring participation in the conception, preparation and implementation of selected activities to ensure that WID concerns are integrated into mainstream FAO programmes. The latter concerns operational arrangements and measures supporting the implementation of the

former. Activities focus on women as producers in agriculture, fisheries, forestry and in the family, a basic production unit in rural areas.

145. A reporting system has been set up to monitor follow-up to the Plan. Moreover, coding of FAO projects for the inclusion of gender issues is carried out through programme planning and monitoring systems which measure the extent to which FAO activities and projects, both regular and field programmes, benefit women.

146. The organization has been working towards coding activities, since 1986, following ECOSOC's 1985 decision to consider a COPA on WID. Coding instructions were sent to various divisions to class FAO Regular Programme activities. The Office of Programme Budget and Evaluation (PBE) entered information into the computer and a list of more or less 2,600 activities of the 1988 workplan was sent to United Nations Department of International Economic and Social Affairs (DIESA). Regarding projects, the three operational units (agriculture, fisheries and forestry) were requested to code every project operated. PBE organized project lists by country, so Country Officers could tackle this task based on their knowledge of ongoing projects. 80% of the information was collected as of last September and a list of project codes sent to DIESA. Activities needed to finalize the coding exercises have been identified for regular and field programmes. Completion is being held back by lack of human resources to carry them out on a more regular basis.

147. Regarding COPA on WID, the analysis/level of detail was not homogenous for all organizations as information was collected in diverse ways. Further, the period covered was 1988-1989 and not 1988-91 (as requested by ECOSOC) as most organizations had not completed planning at the activity level for the second biennium of the latter period.

G. IDENTIFICATION OF AREAS WHERE FURTHER ANALYSIS, DEVELOPMENT, AND MODIFICATION ARE NECESSARY

148. INSTRAW's consultant pointed out that INSTRAW had prepared a list of suggested questions for consideration by the working groups.

149. The questions were divided into four major groups: (a) development and design of programmes and projects (b) monitoring and evaluation (c) feedback and (d) some other relevant aspects related to the programme and project cycle (see annex 7).

150. The Moderator invited the participants to use conference room paper 2 as a general framework for discussion. She expressed the hope that participants would select the points which they deemed most relevant for discussions in two working groups.

151. The plenary meeting then proceeded to identify the most relevant issues and to assemble the list to be given specific consideration by the working groups.

152. Two working groups were formed, moderators of working groups selected and discussions held in which issues, selected during the plenary session, were addressed; conclusions were elaborated and recommendations made on items 7 and 8 of the agenda, i.e. development and/or improvement of the evaluation guidelines and methodologies of United Nations organizations with respect to WID and development of INSTRAW's work programme for the next biennium with specific focus on national programmes and projects.

H. ADOPTION OF GUIDELINES FOR FUTURE WORK AND CLOSURE OF THE CONSULTATIVE MEETING

153. The Working Groups discussed in a plenary session the recommendations of both groups. On this basis, the following recommendations of the Consultative Meeting were agreed upon.

Conclusions and Recommendations

154. The discussion of INSTRAW's survey paper revealed that, with some agencies, the materials used for the paper had subsequently been revised. With others, the materials provided for INSTRAW's desk review were incomplete. In still others, evaluation procedures were not reflected in written documentation. Although, WID issues do not appear in evaluation guidelines and manuals of some organizations, they are built into evaluation through mechanisms such as the terms of reference. It was, therefore, recommended that:

- INSTRAW consider updating the survey paper in the course of its next biennial programme of work.

155. Further, in line with concerns expressed during the discussion of INSTRAW's survey paper, the group proposed that:

- INSTRAW compile WID and gender-related terminology to be incorporated into a revised Joint Inspection Unit Glossary of Evaluation Terms.

Effect/impact Analysis

156. The group considered that impact analysis of the projects or programmes with WID components deserved attention by both United Nations organisations and INSTRAW. Therefore, in order to expand and further disseminate the knowledge base, to provide inputs to the further development of training programmes, guidelines and checklists, and to improve future programme and project design, it was recommended that:

- Further efforts to assess and document the effects and impact of projects should be made.

157. In view of the recognized time and cost constraints of rigorous impact analysis it was recommended that:

- A selected approach be taken to permit the concentration of resources and effort;

- Maximum use be made of United Nations organizations' current capacities, knowledge, ongoing and programmed activities;

- The selection of individual cases or studies should reflect the need to demonstrate, document and explain better success/failures, intended/unintended effects and impacts of WID-specific and mainstream programmes and projects;

- The United Nations system further consider the importance of funding impact evaluation exercises.

Data Bases

158. The participants concluded that most data bases on WID were not sufficiently user-friendly to be easily utilized by planners and programmers and that most existing country profiles, at macro and national levels, had limited usefulness for programmes/project design. They recommended that:

- United Nations organizations promote the production of disaggregated information at the country level and build, through institutional development support, individual Government capacities to produce such disaggregated data;

- The bases for general backstopping for WID programmes be prepared on a user-friendly basis;

- An inventory of existing country profiles that have data on women or are WID-specific be developed and made available to international and national users;

- Country profiles at the sectoral and regional levels that profile WID and income groups as well as appropriate networks for sharing them be developed; and the utilization of country reports that individual Governments submit to the Committee on Elimination of Discrimination Against Women be explored.

Cost-effectiveness of Data Collection

159. Considering the high cost and constraints to funding for impact evaluations in particular, the code of evaluation in proportion to the total cost of the project should be borne in mind and the cost-effectiveness of evaluations studied carefully. To this end, the meeting recommended:

- Use of national consultants, local experts and project participants themselves, as data collection agents;

- Greater exchange of data among organizations in the United Nations system and with bilateral technical cooperation agencies; and

- Constant updating of available data.

Types of expertise and evaluation

160. WID awareness and familiarity with relevant issues have proved to be important determinants of the extent and quality of WID consideration in evaluations. The meeting recommended that:

- All missions for programme/project formulations, appraisal, monitoring and evaluation include WID expertise to the extent possible and that deliberately concerted efforts be taken to include such expertise;

- WID rosters of experts with sectoral categorizations of local experts in the region/country as well as technical/evaluation rosters, identifying individuals with WID capabilities and evaluation expertise, be developed;

- Evaluation should be done by both internal and external evaluations teams throughout the project cycle, that is, the design, monitoring and evaluation stages.

Human/cultural factors in evaluation

161. In addition to furthering efforts to improve evaluation methodologies that take into account the WID dimension, there was a need to consider human factors more generally in application. In as much as evaluations cannot be "culture-free" and "gender-neutral", methodologies developed to evaluate women-specific projects and programmes could bring to mainstream development certain methodologies and insight on how to improve evaluations, so that they could be more applicable to all forms of developmental assistance. For example, UNIFEM's "Knowledge Bank" could easily be applied to mainstream development projects, although it was initially tailored for women-specific projects. The meeting recommended that:

- In developing evaluation research strategies, the influence of factors such as culture, gender, age, ethnicity and class on shaping programme/project implementation effects and impact be taken fully into account;

- Gender-specific or gender-neutral policies be applied according to different purposes of evaluation processes. Gender-specific methodologies could be used for mainstream projects and programmes in order to promote equality;

- WID approaches be utilized to motivate and disseminate up-to-date thinking such as in considering the effects of structural adjustment processes, the fight against the feminisation of poverty, the significance of women's work in the informal sector, the interrelationship of socio-economic aspects with environment and, thus, contribute to the evolution of development paradigms.

Feedback and follow-up

162. In view of the problem of losing evaluation's relevance in improving programmes/projects and the refinement of evaluation methods because of inadequate follow-up to and analysis of the evaluation exercises, the meeting recommended:

- To ensure follow-up, evaluation reports should be required to contain a plan of action for the implementation of recommendations made including the identification of local agencies and capacities;

- Current evaluation exercises be analysed and evaluated selectively with the purpose of drawing lessons both for the improvement of existing as well as the development of new evaluation frameworks.

Training

163. Staff capacity as a major determinant of progress in the integration of WID and its currently insufficient developmental status was acknowledged. It was recommended that:

- United Nations organizations increase efforts to brief and train staff, consultants and experts on applying the WID dimension in project design, implementation and evaluation;

- United Nations organizations make an effort to include WID training in programmes for project personnel, for example by ensuring that the availability of women's courses in curriculum is one of the criteria in selecting training institutions;

- When fielding evaluation or project formulation missions, organizations should use the opportunity for in-house training of field staff and selected government officials.

Participatory evaluation

164. The participatory approach was considered particularly important for ongoing, project-management oriented evaluation because it leads to (a) generation of relevant in-depth community level information (b) advocacy and awareness of WID (c) greater acceptability and support of the programme/project by women (d) improvement of policy design and (e) evaluation of assumptions that informed the initial design, even if they were not apparent at the time of formulation. However, the resource demands of participatory evaluation were recognized as exceeding the resources of organizations. It was recommended that:

- A limited number of projects be deliberately selected to test the validity of the approach with respect to WID in various types of project intervention.

Purpose of Evaluation

165. Given the importance attached to advocacy and awareness raising, and the innovative nature of most WID projects and project components, the meeting suggested that evaluation exercises should:

- Continue to be viewed as one means to raising awareness on the importance of including women's participation and needs in mainstream development programmes/projects; and

- At the same time be used as an efficient management tool to foster interdisciplinary and innovative WID approaches.

Institutional Constraints

166. The meeting identified as constraints for long-term policy design on WID the changing priorities of different donors particularly in selecting priority countries and the insufficient involvement of national governments and institutions in the evaluation processes. It was recommended that:

- United Nations organizations make particular efforts to strengthen national and local capabilities for evaluation purposes and, to this end, greater use be made of national/community based educational and technical institutions;

- These institutions incorporate female research staff members;

- INSTRAW assist in identifying research networks on WID and develop rosters of experts on WID;

- INSTRAW cooperate with other organizations of United Nations system in launching training for programme/project evaluators.

Evaluation of research/policy analysis

167. In view of the difficulties encountered in evaluating research for policy design and analysis, it was recommended that INSTRAW, in cooperation with UNCTAD and United Nation research institutes, explore the possibility of preparing evaluation methodologies on the subject

Sustainability

168. It was recognized that for development programmes/projects to produce the desired long-term WID effects it is necessary to build in elements of sustainability, and sustainability is largely dependent on government commitment and capacity; so, it was recommended that:

- Sustainability become an even greater priority of development cooperation organizations;

- Utmost importance should be given to programme/project designs which address self-reliance requirements and avoid continual dependence on external and even government resources;

- There be increased cooperation with partners at the national level to secure continuity and concentration of efforts;

- Funding for mainstreaming WID approaches be increased;

- United Nations organizations explore the possibility of establishing independent trust funds at the national level and building the coalition among WID institutions at national level.

169. Following the adoption of the conclusions and recommendations, the Moderator thanked participants for their attendance, insightful participation and enthusiastic collaborative work in developing such a comprehensive set of conclusions and recommendations. She expressed confidence that the interest and commitment shown by the organizations represented in perfecting the tools of monitoring and evaluation, for the purpose of advancing the integration of women in development, will continue to produce the desired results. She committed INSTRAW to an early publication of the meeting's report and an updated survey paper.

170. The Moderator then declared the International Consultative Meeting closed.

PART II

THE WOMEN IN DEVELOPMENT DIMENSION IN EVALUATION METHODOLOGIES.

A SURVEY OF APPROACHES BY UNITED NATIONS ORGANIZATIONS

THE WOMEN IN DEVELOPMENT DIMENSION IN EVALUATION METHODOLOGIES
A Survey of Approaches by United Nations Organizations

INTRODUCTION

This survey paper was the first of the three planned outputs of INSTRAW's programme on monitoring and evaluation methodologies for programmes and projects on Women-in-Development (WID) carried out in 1988-89. It was prepared to serve as a background for the Consultative Meeting, the second activity of the programme that took place in New York from 8-10 November 1989.

The paper was initially prepared through a desk review. The corresponding guidelines, WID strategies and/or policy statements, evaluation samples and other related documents provided by organizations were studied to identify considerations of WID issues and draw general conclusions on topics that could be further elaborated by the Consultative Meeting. Since the reviewer had no access to evaluation officers and practitioners, the practical problems of applying the methodologies and guidelines reviewed could not be discussed. However, the issue of application was expected to be discussed in the Consultative Meeting.

Following directives of the Board of Trustees of INSTRAW, upon recommendation of the Consultative Meeting, the paper has now been updated to add new developments as well as incorporate materials, revisions and approaches other than formal methodologies, that were missed in the initial version of the paper. Information for this new documentation was obtained from various organizations of the United Nations system. Discussions were also held with the evaluation and WID officers of those organizations whose procedures or methodologies were either undergoing changes at the time of the Meeting, were insufficiently documented or were not fully reflected in the written documentation utilized in the initial review.

SECTION I: CONCEPTUAL FRAMEWORK

A. Monitoring and Evaluation

Monitoring and evaluation are related but distinct processes through which activities that integrate a programme or project are overseen and followed-up. They are important management tools so long as the information they generate is promptly fed back into the decision-making process.

A programme is part of an organization's plan of activities and constitutes a framework within which these activities are grouped for the achievement of specific objectives in the long term. In the context of operational activities for development within a given country, a country programme consists of all the activities supported or executed by an organization, in a given time period, in support of the country's long term development objectives.

A project is a self-contained undertaking for the achievement of specific objectives within a specified time-period and a given budget.

Programme/project monitoring is considered to be a continuous process because it involves examination and reporting at regular intervals. It keeps track of the delivery and utilization of inputs, the expenditure of funds, the attainment of milestones, the performance of tasks by the personnel involved and the production of outputs in relation to the programme or project document, that is, whether implementation is proceeding as planned and according to schedule.

The process of monitoring, if undertaken in a consultative and participatory manner, is also useful as a learning tool for all participants in a programme or project as it enhances their understanding of the elements involved and their capacity to act upon them to improve the quality of implementation. In addition, the information it produces feeds into the evaluation system and through it affects decisions on the extension of ongoing programmes and projects and the design of new ones. But, primarily the purpose of monitoring is the utilization of its findings for identification of necessary corrective action by the management. For this purpose, it is necessary that the process be continuous, uncomplicated and based on current information that is collected through a process built into the programme/project design.

Evaluation is the process of systematically analysing the relevance, effectiveness, efficiency and impact of programmes and projects. It is undertaken for the purpose of improving the performance of current activities, the quality of future programme/project design and the allocation of resources in current and future programmes. An evaluation exercise must, therefore, compare achievements and their timing with planned objectives and time-tables, establish any discrepancies and identify explanatory factors for these, in order to draw conclusions and recommendations for improving the achievement of objectives in the future. It must also analyse the programme/project design to determine the adequacy of the objectives themselves and of the plan to attain them, that is, whether the objectives responded to a realistic assessment of needs at the time of formulation and are still valid, and whether the activities planned are appropriate for meeting the objectives and are sufficiently supported by the inputs provided.

Evaluation must, therefore, be undertaken, at the earliest, when activities are well into the implementation phase, for example at mid-point; often, it is also undertaken as terminal and sometimes ex-post, that is at the end of a programme/project or after some time has lapsed. In these last two cases, it can influence the determination of impact. The information needed for evaluation includes the implementation reports furnished by the monitoring systems and additional ad hoc information collected during each exercise according to the type of evaluation. The determination of impact often requires the undertaking of special surveys to collect data which can support rigorous analytical methods, but which are costly in time and resources. Impact evaluations are, therefore, not routinely undertaken but selectively planned for projects that are very large and complex or which represent substantial investments of a pilot or experimental nature.

Ideally, monitoring should provide a measure of progress towards objectives and/or point to milestones reached. Evaluation will later utilize these measures and milestones to determine the efficiency, timeliness, effects, etc., of implementation.

For many projects, quantitative indicators can be devised as measuring instruments. These should be identified at the design stage. At the same time, the aim to substantiate the process

initiated or catalyzed by project interventions should not be obscured by excessive pre-occupation with quantification.

Milestones could refer to inputs but more generally relate to the completion of activities or components thereof, or the total and partial production of outputs. The indicators selected must be valid and specific, that is, measure only what the evaluation intends to measure. Indicators must also be sensitive and reliable, which means they must readily show the changes they are intended to measure and always in the same manner. In certain fields, activities and their results may not be measurable, thus devising quantitative indicators may not be possible. Judgement must then be reached qualitatively, with or without the support of quantitative data, based on criteria that must be carefully considered.

The process of evaluation is, then, highly analytical and demands the careful selection and use of criteria and indicators. Therefore, although its main purpose is to reach conclusions that will orient future action, the process itself is as important as the conclusions, for it involves learning about the activities being evaluated, the context in which they are implemented and understanding ramifications for the future. But to be effective as a learning devise, evaluation must be guided by objectivity, a quality easier to attain if the evaluators are independent, not involved in the programme/project's implementation. Its results must be fed back into the process of programming and project formulation and design.

The end users of evaluations are not only programme and project managers but also assistance organizations, recipient governments and donors interested in reviewing their policy directives in the light of assessment of their implementation through programmes and projects.

B. The Women in Development (WID) Mandate

The inherent equality between men and women was recognized in the Charter of the United Nations and proclaimed in the Universal Declaration of Human Rights. But the universal establishment of this principle into the reality of everyday life has continued to be constrained by prevailing conditions in all aspects of human endeavour and, at all levels, from the family to international. To promote equality between men and women, the United Nations General Assembly in its resolution 3010 (XXVIII) proclaimed 1975 as the International Women's Year and world conferences on women were held in Mexico City (1975), Copenhagen (1980) and Nairobi (1985).

The World Plan of Action adopted in Mexico City during the World Conference on the International Women's Year[1/] and the Copenhagen Programme of Action launched by the World Conference on the United Nations Decade for Women[2/] elaborated measures to be taken at national and international levels within a framework promoting equal opportunities for women's participation in development not only as beneficiaries but as active agents, and proclaimed the United Nations Decade for Women (1976-1985).

In 1980, the General Assembly adopted the International Development Strategy for the Third United Nations Development Decade[3/], for the success of which the importance of the full participation of women as beneficiaries and agents of development was recognized. In the same year, the General Assembly in its resolution 35/73 requested the preparation of an outline for an interdisciplinary world survey on the role of women across multiple sectors. In 1981, resolution 36/74

of the General Assembly recommended that this be done in relation to key developmental issues envisaged in the International Development Strategy. Thus, the world survey that was undertaken analysed the role of women in agriculture, industry, money and finance, science and technology, trade, energy as well as in the concept of self-reliance, integration of women in development and the interrelations between these issues.[4/]

The work of the United Nations system to support the Member States in addressing their concern for women's participation in development during the Decade did integrate, in all its areas of activity, the means and modalities to promote involvement of women in all programmes and projects, in line with the Copenhagen Conference's call for "systematic and sustained linking of efforts to integrate women into national development planning and policies...and...the allocation of adequate materials, technical and personnel resource within each sector of national development".[5/] In addition, technical cooperation activities did, as stated by the Mexico conference, strive to complement governments' efforts to enhance "the development of human resources particularly among the most disadvantaged groups of population with a special emphasis on women".[6/]

The World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development and Peace held in Nairobi, in July 1985, undertook appraisal of the work of the United Nations system in the light of the framework of equal opportunity and utilized as one of its basic documents the report of the World Survey on the Role of Women in Development.

The survey had concluded that during the decades from 1950 to 1980 increasing numbers of women around the world were seeking employment, thus determining a non-traditional high level of female participation in the labor force. It had found that women constituted more than one quarter of the industrial labour force and almost two fifths of that in agriculture and services, but their contribution to economic development continued to be underestimated in official statistics because they were often counted as unpaid family labourers in agriculture; and in industry, more frequently than men, they were found in informal activities. While women's participation in professional and administrative occupations had increased in most countries, their presence was predominant in agricultural low-paid manual labour. Therefore, there continued to exist a wage gap between the sexes. Furthermore, women had suffered from the employment and income effects of the international crisis during the first half of the seventies and from the reduction in support services caused by the austerity measures most countries were obliged to adopt to counteract the crisis.

The Nairobi Conference also considered in its appraisal an inter-agency report on the work of the United Nations system in integrating women in development in the specific field of technical cooperation.[7/] This pointed to considerable progress, particularly in understanding and articulating women's problems and the approaches developed to solve them; but it was found that in practical terms "women largely remain(ed) outside the main framework of technical cooperation"[8/] as less than one in six projects considered to have effects on women's lives and work took women's interests into account in their design. For the projects reviewed, information on the situation of women was not included in project formulation, women were rarely considered a target group and their needs, aspirations, education, skills and time constraints were not taken into account in designing activities. Because of inadequacies in staff training and in guidelines or their implementation, there was a "persistent failure to recognize the centrality of women's role in development"[9/] and because monitoring and evaluation were generally not built into project structures, it was "impossible to specify the effect of project activities on women".[10/]

Based on the appraisal, the principle for integration of women in all aspects of the development process as essential to the achievement of development was reasserted by the Conference and made the basis on which the Nairobi Forwarding-looking Strategies for the Advancement of Women were structured. Paragraph 21 of the Strategies stated that:

"development should now move to another plane in which women's pivotal role in society is recognized and given its true value. That will allow women to assume their legitimate and core positions in the strategies for effecting the changes necessary to promote and sustain development."[11/]

As a measure for implementation, paragraph 327 concluded that the full and equal participation of women in technical cooperation projects and activities should be a standard component of technical cooperation policies.

C. Monitoring and Evaluation as Tools to Promote the Advancement of Women in Development

Two currents of concern on the part of the Member States of the United Nations are of immediate relevance to the subject of this paper. The first relates to the efficacy and efficiency with which the United Nations system carries out its activities, which has prompted increasing calls from the Member States for monitoring and evaluation to be established into programme planning as an integral component.

In the particular field of development, the persistence of underdevelopment and extreme poverty in many countries despite national and international efforts to eradicate them and the negative effects of economic recession on the availability of assistance have resulted in re-appraisal of development priorities and approaches and an additional impetus for monitoring and evaluation of development activities. Instead of a focus on economic aspects and a preeminence of GNP growth as a goal, a multisectoral approach and distributional and equity considerations have been increasingly accepted, and the emphasis has shifted from increased assistance to greater efficiency in its use.

Consequently the international community has, in a series of General Assembly and other bodies resolutions[12/], called for strengthening monitoring and evaluation functions in the United Nations system, making evaluation an integral part of agencies programming and development processes, and for establishing evaluation units within agencies, evaluation plans as well as standards and guidelines for evaluation.

In line with these calls, the establishment of a Central Evaluation Unit in the United Nations Secretariat in 1985 and the publication of the Evaluation Manual of the United Nations in 1986, which incorporated the work previously done by the Joint Inspection Unit (JIU)[13/] were steps in institutionalizing the processes of monitoring and evaluation under a common conceptual and methodological approach. Some of the different agencies which had accumulated substantial experience in monitoring and evaluating field programme and projects also strengthened their existing systems. UNDP, for example, restructured its Central Evaluation Office in 1983 and updated its evaluation guidelines in 1986-1987. In 1987, a common monitoring and evaluation system that applies to all UNDP-assisted projects was introduced. It was expected that this would be the basis for a system-wide harmonized system for technical cooperation programmes and projects.

The second current of international concern underlying the mandate of this study involves the findings of the appraisal undertaken by the Nairobi Conference of the progress made in integrating women in development. In view of the limited progress, the persistence of the multiple obstacles that impede women's advancement at all levels, and also in line with the reorientation of development thinking towards social goals, the Forward-looking Strategies emphasized grass-roots participation and self-sufficient development; special attention was to be paid to the poorest segments of the population where women are a majority and bear the heaviest burdens.

Implementation of the Strategies would then require broadening the access of women to technical cooperation activities. In paragraph 324, the Strategies establish:

"Agencies which do not have specific guidelines or project procedures relating to women in development interlinked with the other aims of the period up to the year 2000 should ensure that they are developed. Such guidelines and procedures should apply to all aspects of the project cycle. Existing guidelines and procedures have to be applied more vigorously and consistently; in particular, each project document should contain a strategy to ensure that the project has a positive impact on the situation of women".

Paragraph 325 further states that:

"Systems should be developed which allocate responsibility and accountability".

The two currents of concern herein identified come together in the mandate issued to INSTRAW by ECOSOC resolution 1987/25 on "the elaboration of special methodologies promoting broad-based approaches for programmes and projects on women and development and to the evaluation of their effects", and by General Assembly resolution 42/65 "to promote general awareness of and training in the pragmatic approach to the integration of women into policy designs, including the elaboration of special methodologies for monitoring and evaluation purposes".

The regular programmes of the United Nations are evaluated internally in each organizational unit by the programme managers or externally by the corresponding central evaluation unit, in relation to the programmes and subprogrammes of activities as approved by the governing bodies. To the extent that WID aspects are included in these programmes and subprogrammes, they will be monitored and evaluated according to the procedures and with the methods that have been developed for all programmes within each organization. In addition, to ascertain the progress made by the system as a whole in the WID area, a Cross-Organizational Programme Assessment (COPA) could be requested by the Committee for Programme Coordination (CPC) as it was for 1989.

On the other hand, the activities that directly involve and/or affect women in developing countries, particularly in the poorer groups, are those of development cooperation and assistance, and the 1985 inter-organizational assessment that was quoted above found them generally lacking an explicit inclusion of women in their design. This being the case, it is the role of evaluation not only to establish this fact and indicate how the objectives, as designed without a women's dimension, could have been better attained but to identify how a WID dimension could have been included and whether negative effects could have been avoided or ameliorated or positive ones promoted by including women as beneficiaries and as agents. Evaluation can also point to WID indicators that could be built into the monitoring process. Through feedback into programme and project design, this type of information from evaluation will contribute to better designs and facilitate the routine taking

into account of WID goals throughout the technical cooperation cycle. In view of the fact that evaluation promotes the inclusion of women in all phases of programme and project development, the present review focusses on this capacity rather than on monitoring and evaluation.

SECTION II: FINDINGS

United Nations (UN)

The efforts of the United Nations in the field of programme evaluation started in the mid-1970s. In 1974, a Programme Analysis and Evaluation Unit was established in the Budget Division, Office for Financial Services (OFS), Department of Administration, Finance and Management, currently Department of Administration and Management. The Unit was responsible for the evaluation of programmes in all sectors until 1980, when an additional central evaluation unit was created in the Office for Programme Planning and Co-ordination (PPCO), Department of Economic and Social Affairs. The two units shared responsibilities between 1980 and 1984, the OFS unit evaluating programmes in political, legal, humanitarian and common services, and the PPCO unit evaluating programmes in economic and social sectors. In 1982, the Regulations of the United Nations Governing Programme Planning, the Programme Aspects of the Budget, the Monitoring of Implementation and the Methods of Evaluation were adopted by the General Assembly. In line with these regulations, the two units were merged in 1985 into the Central Evaluation Unit (CEU). This Unit is currently located in the Office of Programme Planning, Budget and Finance, Department of Administration and Management.

The CEU was responsible for the development of evaluation guidelines and methods, and their compilation in the Evaluation Manual of the United Nations which was published in 1986. The Manual is concerned with the internal evaluation of regular activities which can take two forms: self evaluation by programme managers, primarily for their own use, and in-depth evaluation by the CEU.

Self-evaluation focusses on the subprogramme level and must be designed into the subprogramme itself at the programming stage. Its findings are utilized for programming in subsequent periods and constitute inputs for any in-depth evaluations undertaken. In-depth evaluation is focussed on the programme level and is concerned with policy aspects, including management and design. It is undertaken at the request of the Committee for Programme and Coordination (CPC) endorsed by the Economic and Social Council and the General Assembly. Its findings are intended to be utilized by intergovernmental bodies for reviewing their policy in the corresponding programme area.

For an internal evaluation to focus on WID there would have to exist a specific programme, subprogramme, or component thereof. The procedures used would be the same as for any other programme area as there are no WID-specific guidelines in the Manual.

In 1984 CPC established a time-table for the period 1986-1992, for the in-depth evaluation and triennial review of the implementation of its recommendations emanating from evaluation reports submitted by the Secretariat. In 1986, it added to the time-table an in-depth evaluation of social development activities for consideration in 1994. This evaluation will include United Nations activities in the area of WID. In addition, the mandate for integrating women's aspects in all programmes is system-wide. A special instrument exists for evaluating programmes with this scope known as the

Cross-Organizational Programme Assessment (COPA). This type of assessment is requested by CPC and is undertaken by the Division for Inter-organizational Cooperation and Programme Development, Department of International Economic and Social Affairs. There are no standard guidelines; so, the methodology of a COPA is determined by the Division according to the programme issue being assessed. A COPA on WID was submitted to CPC in 1989.

UNCTAD, UNCHS (Habitat), UNDRO, UNEP, UNHCR, UNRWA, the Regional Commissions and Department of Technical Cooperation for Development are all part of the United Nations Secretariat. All have units with evaluation functions and conduct evaluations of their regular programmes according to regulations adopted by the General Assembly in 1982 and the guidelines established by the CEU. They undertake field activities and function as executing agencies for technical assistance projects. Each of their procedures for evaluating activities are reviewed in the paragraphs below.

United Nations Department of Technical Cooperation for Development (UNDTCD)

DTCD acts as executing agency for multilaterally financed projects, which are usually evaluated following the procedures of the funding organization. The Department has developed, however, an implementation strategy that responds to the system-wide mandate on WID and, along with it, general guidelines to facilitate the systematic promotion of women's integration in technical cooperation programmes. It also expects to develop guidelines for all its sectors of activities. Of these, the first to be produced have been on population.

The guidelines comprise general directives to focus on specific issues at each stage of the project cycle - e.g. briefing of experts, preparation of kits for new appointees, drafting of terms of reference for mission - and checklists of relevant questions for the design and evaluation stages, and of actions to be taken during the implementation stage. The checklists for design and evaluation have been based on UNDP's and on UNFPA's formats, respectively.

The Regional Commissions

The regional commissions follow the United Nations guidelines for internal evaluation and have regional evaluation units with the same responsibilities at regional level as the CEU has at headquarters. For evaluation of field projects, the regional commissions follow the UNDP methodology which, in the case of the Economic Commission for Latin America and the Caribbean (ECLAC), is supplemented by its own guidelines.[14/]

ECA's strategy for the integration of women in development is to play a catalytic, coordinating and disseminating role. This is facilitated at the subregional level by the presence of Women's Coordinators or focal points at the Multinational Programming and Operational Centres (MULPOCs) that have been established, thus far, in four subregions and have the functions of collaborating with respective countries on issues of common interests. At the center of the programme is ECA's African Training and Research Centre for Women (ATRCW), which endeavours to increase women's capacity to play a larger role in development through training and research. Evaluation of the ECA programme for the integration of women in development at the subregional level was undertaken in 1987-1988 by a UNDP/ARCC/ECA team in order to establish

its impact on member states and to identify the structures that are able to respond to the new UNDP WID approach.[15/] Both the MULPOC Women's Coordinators initiative and the evaluation of the subregional women's programme offer lessons for other field initiatives in WID.

The ECLAC guidelines provide step by step direction for maintaining a focus on the involvement of women and their communities through the stages of a programme or project life. They discuss methods and provide illustrations and exercises for each aspect: the identification of programme or project ideas, the institutions that originate them, sponsor and regulate the projects; the identification and development of programme strategies and related projects and their resource requirements; the writing of proposals, the management of approved programmes and projects, and the monitoring and evaluation of their implementation. The evaluation aspect is thus included and the final checklist of WID questions constitutes a useful reference for evaluators, particularly for assessing the project design and identifying aspects that should be considered in project extensions and new projects. It is included as Annex 1.

ESCAP has developed a questionnaire, based on issues of the World Survey, for assessing implementation of the Nairobi Forward-looking Strategies for the Advancement of Women in countries of the region. It has also developed a guide for the compilation of selected statistics and indicators for the status of women in the region. Although these are intended for the assessment of women's status at country level, evaluators could utilise the definitions and methodologies for derivation for evaluation purposes.

United Nations Conference on Trade and Development (UNCTAD)

The mandated role of UNCTAD is to promote international trade particularly of developing countries with a view to accelerating their development. UNCTAD is a principal instrument of the General Assembly for deliberation and negotiation in respect of international trade and related issues. The general aims of the intergovernmental dialogue in UNCTAD are to strengthen international systems, structures and arrangements in the fields of trade, money and finance, to enhance their supportive role to national development efforts of developing countries and encourage positive interactions between national policies, internationally accepted rules and disciplines, and the operation of the world markets.

Technical cooperation consists mainly of advisory services and training related to specific trade and development issues, for example guidance to trade officials the in complexities of the Generalized System of Preferences, assistance to participating countries in the formulation and implementation of integration/cooperation schemes or training activities to assist in the formulation and the implementation of maritime transport policies.

Evaluation of UNCTAD activities relates mainly to the regular programme and is undertaken according to United Nations Procedures and Manuals supplemented by methodological materials, such as worksheets, developed by UNCTAD's Programme Coordination and Evaluation Unit (PCEU). There are two types of evaluation: self-evaluation by programme managers, focussed on subprogrammes, combined with independent evaluation by the PCEU and of the PCEU evaluation of technical cooperation programmes. The PCEU also cooperates in COPAs, assists on evaluations as needed and reports on evaluation activities and findings to intergovernmental bodies of UNCTAD.

WID issues do not arise in the United Nations Evaluation Manual, as discussed above. Moreover, the orientation of UNCTAD technical cooperation, mainly to international trade related officials and negotiators in an apparently largely technical field, does not easily allow for WID considerations. However, taking special social considerations into account during negotiations could prove to be of great importance to women because through trade negotiations economic benefits could be obtained which would ease the burdens on the poor, amongst whom a majority are women.

United Nations Centre for Human Settlements (Habitat)

Habitat's programme is guided by the objectives of the Global Strategy for Shelter to the Year 2000 and its plan of action. Its activities, accordingly, are to be monitored and evaluated, so as to assess progress towards the goals of the strategy.

Habitat also engages in periodic internal self-evaluation of its regular programme in accordance with the mandate, methods and procedures of the United Nations as contained in its evaluation manual and has also designated an Evaluation Office.

In order to ensure that women's issues are incorporated into the implementation of the Global Strategy, Habitat has developed a checklist of "indicators for Assessing Women's Aspects in Human Settlements Development Strategies". This checklist records issues to consider and questions to raise, first with respect to women's access to decent shelter and services, and second with respect to each of the stages of the technical cooperation cycle:

- strategy formulation (or design and planning);
- strategy implementation (programmes) and monitoring;
- strategy performance and evaluation.

The objective is to achieve the inclusion of women's issues in all phases of the cycle. But no specific guidelines have been developed for any one of the phases. The Technical Cooperation division follows the UNDP Programme and Projects Manual Guidelines, and utilizes the WID questionnaire developed by UNDP.

WID is an important component of Habitat activities. These include training for women's organizations and ministries related to human settlements in the promotion of women's participation in human settlements development and management; regional seminars that were held in 1986 and 1989 to exchange experiences and identify lessons that would inform future national and regional action; the Habitat International Coalition of Non-Governmental Organizations establishment, in 1988, of a Women and Shelter Group and their issuing of a plan of action to incorporate women's concerns into all national and international shelter programmes and activities.

Habitat engages in internal evaluation according to the methods and procedures of the United Nations and its Evaluation Manual. An Evaluation Office has been created but no separate procedures for evaluation of operational activities have been developed. However, for projects financed by UNDP, the evaluation procedures of this organization are applied.

United Nations Office of the Disaster Relief Co-ordinator (UNDRO)

UNDRO has cooperated with UNDP in 183 disaster-related projects since 1973. In the framework of this cooperation, a special evaluation plan for a selected number of projects was drawn up jointly with UNDP in 1988, centering on projects involving longer term activities regarding mobilization for better protection against recurrence of disaster and use of planning techniques. The evaluations (five projects in total) took place in accordance with UNDP guidelines.

UNDRO's interventions to mitigate the consequences of disaster are regularly evaluated. A special "Disaster Evaluation Sheet" focussed on the characteristics of the activities required in disaster situations and the performance of the relief organizations is completed for each operation. It calls for information on the number of women and children in need of emergency assistance.

United Nations Environment Programme (UNEP)

UNEP developed a draft evaluation methodology in 1987, following decision 14/1 of its Governing Council which enjoined it to make evaluations an integral part of programming using a methodology "prepared in consultation with partners of UNEP in the UN system and with Governments". The consultation process is underway.

The draft methodology, straight forward and concise, utilizes standard UN terminology and concepts. It distinguishes types of evaluations by mode (internal, external), scope (desk/internal, in-depth), timing (interim, terminal, ex-post) and establishes criteria for deciding what projects to evaluate. With respect to reporting and feedback mechanisms, it raises two points not frequently mentioned: the use of informal as well as formal mechanisms and the value of "tactfully packaged" findings and lessons for dissemination.

There is no mention of WID concerns in the draft methodology. It is possible that the nature of UNEP projects, which is catalytic rather than directly operational, makes it difficult to identify the avenues to women's involvement and thus the relevant evaluation questions, at least at an early stage in methodological development. But some initiatives to involve women in environmental management have been taken, for example the selection of a special focus on women for the 1988 State of the Environment Report and the formation in 1985 of a Senior Women's Advisory Group to the Executive Director (SWAG) which has taken initiatives in the areas of education, mobilization and awareness building as they relate to women and environment. SWAG could, in the process of consultation on the draft guidelines, point to the need to correct the WID omissions.

United Nations Office of the High Commissioner for Refugees (UNHCR)

Evaluation activities carried out by UNHCR's Central Evaluation Unit concentrate on improving field operations through in-depth evaluations of regional and country programmes for refugees. Although the majority of these focus on material assistance, other operational aspects are covered such as refugee protection activities, implementing arrangements, organizational structure and staffing levels. During recent years, the Unit has begun to report systematically on women's issues with a view to improving the situation of refugee women.

In depth evaluations review a wide range of issues besides analysing the operation's progress towards its overall and sectoral aims as well as the efficiency and cost-effectiveness in implementing activities. For example, they analyse the extent to which operational activities are consistent with durable solutions being envisaged for refugees. They also consider the extent to which the operation is making a substantial contribution to refugees well-being, i.e. its impact. Women's needs and concerns are normally highlighted as one of the major issues.

UNHCR has developed general guidelines for evaluating emergency operations which have relevance for evaluating all field operations. In most instances, however, the evaluations carried out by UNHCR's Central Evaluation Unit do not involve routine and repetitive tasks. The issues addressed in evaluations were the range of analyses that can be employed in carrying out the actual study. As a consequence, general principles guide the work but each evaluation must be carefully designed for the situation.

Evaluation results in UNHCR are principally aimed at providing managers with information that can be used to improve planning and implementation as necessary. The lessons learned during evaluations are disseminated to staff involved in similar activities either directly or through staff training.

United Nations Relief and Works Agency for Palestine Refugees (UNRWA)

UNRWA is an operational agency providing direct assistance in education (schools, teacher training), health (basic health care, health training), relief and social service to about 2.4 million Palestine refugees in three countries and the Occupied Territory of West Bank and Gaza. Accordingly, most of its evaluations are of an ongoing and operational nature and focus on improving the quality of main service programmes and administrative support activities.

UNRWA's evaluation activities are governed by Organizational Directive 21 which also sets the requirements for monitoring performance and links the planning process with the results of evaluation studies. The Directive also requires the establishment of a biennial evaluation plan that includes (1) self-evaluations by programme managers (department and unit heads) along with annual reporting on and (2) centrally-directed evaluations by the Audit Office such or the Programme Planning and Evaluation Office under the direction of the Commissioner General.

During 1990, the Programme Planning and Evaluation Office undertook a comprehensive review of the procedure and reporting system for self-evaluation and carried out intensive training workshops at Headquarters and in the five fields of operation.

The first evaluation plan for 1990-1991 was issued in October 1990. It is divided into the four sections in which assistance is rendered and Administration. It describes studies and evaluations already scheduled and suggests topics for additional ones.

Evaluations of the following were completed in 1990: (i) Child Nutrition Survey, (ii) Impact of School Closure in the Occupied Territory on Pupil Achievement, (iii) Shelter and Services in West Bank/Gaza Feasibility Study and (iv) UNRWA Data Processing Study.

International Atomic Energy Agency (IAEA)

In view of the growth of the Agency's technical co-operation programme in the last decade and the increasing importance attached to evaluation as a management/design tool, the Agency established a Technical Co-operation Evaluation Unit in 1983, upgraded to a Section in 1985, and has systematically conducted evaluations since 1983. The IAEA evaluation system is comprised of the following:

- Ongoing evaluations of a project or a group of similar projects, with focus on, inter alia, impact;
- Terminal project evaluations, with emphasis on lessons learned, for purposes of project planning and policy revision;
- Ex-post project evaluations, some time after completion, to ascertain effectiveness and impact;
- Process evaluations of specific programme components or aspects;
- Country programme evaluations, which assess the Agency's assistance in terms of the recipient country's development objectives.

With respect to manner and agent of evaluations these can be:

- Interim Project Implementation Reports by national project counterparts on an annual basis - These constitute the spine of the monitoring system;
- Desk Evaluation Reviews (DERs) of ongoing and completed projects - Internal, by the Evaluation Section;
- Field Evaluation Reviews (FERs) of a limited number of complex, multi-year projects and pilot or prototype projects; - External, in-depth.

The Procedures Manual for Evaluating IAEA Technical Co-operation Projects, published in 1986, details the structure of the system, and provides standard formats for the different types of evaluation reports, terms of reference, staff development workshops and checklists of evaluation questions on specific project aspects and project types. It constitutes a valuable analytical tool both for scope and detail, but does not include a WID dimension.

International Civil Aviation Organization (ICAO)

The technical assistance programme of ICAO has endeavoured to create new opportunities for women's training in areas other than traditionally female civil aviation disciplines. The corresponding training projects also have increasingly recruited women experts and consultants. The evaluation of these projects is undertaken according to the procedures of financing agencies, for example UNDP's Women in Development: Policy and Procedures.

International Fund for Agricultural Development (IFAD)

IFAD has set two priorities for its activities in agricultural and rural development in developing countries: reaching the poorest sections of the population and building the institutional capacity for poverty-alleviating development. In recognition of the situational diversity among the rural poor, IFAD emphasizes specificity which requires a variety of instruments for targeting project

assistance to special groups. For example, it has designed "discriminatory instruments to tilt institutions and orient benefits specifically at poor rural women", such as changing credit by-laws, and establishing credit quotas, training programmes for women, etc.

The activities are structured according to the Lending Policies and Criteria (LPC). These establish, in the field of monitoring and evaluation, requirements for (i) a built-in monitoring and evaluation component in individual projects, and (ii) assistance to recipient country institutions for design/implementation of monitoring and evaluation systems appropriate to IFAD-financed projects.

Accordingly, monitoring and evaluation are strongly built-into IFAD's operational activities. A Division within the Planning Department carries out the evaluation functions and an Evaluation Committee reviews the evaluation reports. With respect to type one, the following types of evaluation are undertaken:

- Mid-term evaluation - In-depth analysis of project management, its efficiency, effects, impact, working, adequacy of monitoring/evaluation system in identifying adjustments, modifications, etc. to be undertaken in project lifetime;
- Completion evaluation - Undertaken for certain projects selected on the basis of pre-established criteria, within one year of termination of project. Covers all aspects of project design, performance, effect/impact and, in addition, reviews existing monitoring/evaluation data and information base in order to identify gaps;
- Interim evaluation - Undertaken close to completion in cases where a second phase of the project is contemplated.
- Thematic evaluation studies and comparative reviews - In selected sectors, based on desk studies or field missions. Several of the first type have been completed; the comparative reviews are planned for the future.

Although the evaluation system is well established and active, there are no standard guidelines or WID-evaluation guidelines; for example, in 1989, 21 evaluations were completed, equally divided among completion, mid-term and interim. Evaluations are usually done by collaborating (co-financing or implementing) institutions, with IFAD's participation in missions. IFAD'S effort to involve and benefit women is made earlier in the project cycle, as three or four missions are fielded for project identification, special programming, formulation and appraisal (assessment of economic viability).

With respect to type two, the building of national capacities for monitoring and evaluation, the approach is to do so not only at project, but also at sector and central levels, in three steps:

(i) Preparation of Guiding Principles for the Design and Use of Monitoring and Evaluation in Rural Development Projects and Programmes. This was accomplished in 1984 by the Panel on Monitoring and Evaluation of the United Nations ACC Task Force on Rural Development, chaired by IFAD.

(ii) Preparation of detailed guidelines for major sub-sectors. The first, for irrigation, was published in 1987.

(iii) Country level handbooks by sub-sectors or types of projects to supplement the sectoral guidelines. These will be developed in the future.

The Guiding Principles contain a section on WID in the chapter on "Special Topics" and a checklist of relevant items on which to focus to ensure a WID coverage. It is reproduced in Annex 6 of this paper. The guidelines for irrigation projects are detailed to the level of identifying indicators by activity for four categories of irrigation projects but do not have a WID content.

IFAD's overall commitment to WID has been intensified with special bilateral funding. In 1989, a WID technical adviser was recruited and four project case studies undertaken to assess women's participation and benefits and to provide lessons for the development of future strategies.

Two important tools have been provided for gender analysis (undertaken after project approval): an analysis of women's household and agricultural tasks produced for all projects and a data base on WID country data as well as for intended and actual beneficiaries of IFAD projects. These could be used for monitoring and evaluation to follow-up on the WID dimension but this link has not been developed. Current emphasis is on WID specificity in design, briefing IFAD missions on WID and on utilizing available tools to design project components that involve women on an equitable basis and on recruitment of consultants to do so.

International Labour Organisation (ILO)

The ILO has a small evaluation unit within the Bureau of Administration and Programming. Of its four professionals, one works primarily on WID. The Unit's functions cover project design as well as evaluation phases. At the design stage, the Unit ensures uniform high quality project documents and undertakes in-house coordination to avoid duplication of activities, within any one country, by projects from different technical services. It has, therefore, produced guidelines for the preparation of summary project outlines, utilized for sounding out interests of potential multi-bilateral donors except UNDP, for which its own format and procedures apply. These guidelines require the identification of the main characteristics of beneficiary groups, their composition by sex and socioeconomic roles of women. The Unit has also issued General guidelines on how to integrate women's interests in project design and offers training to staff through three and a half-day courses that utilize case studies.

With respect to evaluation, the Unit's functions are two fold. First, to support the evaluation work of technical departments, particularly with respect to external, independent evaluations. While the Unit participates in preparing Terms of Reference (TORs) for some evaluation missions, it has also developed an outline for TORs in general. Although this does not systematically incorporate a WID dimension, it makes a specific reference to women amongst disadvantaged groups, on whom a project may have unintended effects. Further, the Unit undertakes thematic evaluations to report on the impact of technical cooperation programmes. For instance, the theme for 1990 was institutional development, and involved the assessment of about 30 completed projects.

The Unit has established an Evaluation Service which centralizes and abstracts all ILO evaluation reports, including those of other agencies. It also organizes workshops to discuss the conclusions of all evaluations in which the Unit participates.

WID is not systematically integrated into all evaluations. The current emphasis is on the design phase for which indicators and a rating system on WID integration (which could later be utilized for evaluation) are to be developed in the future. Evaluation is carried out by technical

departments with the assistance of the Evaluation Unit, according to an annual plan. Project evaluations are internal, mid-term and external, final. Treatment of WID is to a large extent determined by the technical unit's understanding of and commitment to the issue, which is influenced more by the degree of experience of the staff than by any formal training.

ILO's commitment to WID was articulated in 1986 in the ILO Plan of Action on Equality of Opportunity and Treatment of Men and Women in Employment which called for both a full integration of women workers in the organization's programme in addition to establishing strategies and identifying main areas of activity. In the technical cooperation area, it emphasized expanding WID coordination, including WID dimensions in terms of reference, providing advice and assistance to field offices on WID integration and learning from experiences of other organizations about WID guidelines, checklists, etc. with a view to developing similar instruments in the future.

The Plan of Action also called for the following new activities:

(i) A pilot assessment of nine selected mainstream projects in one region, Southern Africa, to determine the impact on women to render lessons for project improvement through inclusion of gender sensitive planning.

(ii) Developing a network of officials to monitor the WID dimension in technical cooperation (it has since then been established). There are regional advisers in all geographical field areas, headed by a WID Adviser, the Director-General and WID focal points in all technical departments at headquarters. They coordinate with each other and hold a number of thematic encounters each year.

(iii) Developing guidelines for project design, evaluation and staff training out of which those for design and staff training are already available. However, a number of methodological developments have been undertaken in relation to specific projects or programmes which either include gender considerations or at least require sex disaggregated information. Some examples are based-planner, teaching-learning evaluations process within the "Training for Rural Gainful Activities" (TRUGA) project; the "guidelines for evaluation of training and works projects oriented to local employment and resources", and the guidelines on monitoring and evaluation for a cooperative training project in Nepal.

The evaluation experience of the ILO Centre for Advanced Technical and Vocational Training is of particular interest because many of its activities are WID focussed and the training methodology has built-in evaluation components with particular relevance to the training of women.

The methodology adapts training to the region, country and individual trainees through a multimedia modular approach. It evaluates the training process throughout each training action (course, seminar, etc). This involves: (i) design of the training action on the basis of an assessment of requirements for development of competencies and job profiles; (ii) evaluation of level of competence of trainees at entry level, and entry/exit of each module to identify modifications necessary at the end of the training, and (iii) a final impact evaluation some time after.

The evaluation at the design stage has proven useful for determining training strategies specifically for women and also WID sensitive training for mixed groups and for male decision

makers. The ongoing evaluation of learning, because it is done by the trainee, is appropriate for adult trainees and particularly for women, who may be affected by lack of confidence, shyness, etc. when facing traditional tests. The evaluation of impact, through seminars or workshops, scrutinizes development and implementation of a practical activity, by the trainee, utilizing competencies acquired; in the process, favourable and unfavourable social, institutional and job related factors have been identified that limit opportunities for women to apply their knowledge and skill, especially to decision making.

The Institute also trains key personnel on the use of its methodology for evaluating training actions, thus seeking a multiplier effect; it has drawn up a course on the design of training programmes for the integration of women in the development process and has developed training modules on specific technical subjects such as energy conservation, water and sanitation, and women in collaboration with other organizations. It is working on the development of WID modules for all its courses, particularly as sensitizing tools related to the three working priorities of ILO: adjustment process, burden of labour on women and child labour.

For the ILO, the Institute will prepare a training package on how to consider the WID dimension in all phases of a project and a module on how to foster, through technical cooperation, the application of ILO norms to women. For UNDP, it has developed a programme of interactive training for representatives of UN organizations and high level staff in the field, with modules on all aspects of technical cooperation, each of which will have a WID component. As in all its activities, the evaluation elements are fundamental to the structure of these new programmes.

International Maritime Organization (IMO)

IMO has responded to the call for the integration of women in all development activities by the elaboration of a strategy[16/] and a corresponding action programme. Since the organization's mandate is to assist in the development of the maritime sector in developing countries, its technical co-operation programme is central to its activities. Through it, the development of maritime infrastructure is promoted with priority given to investment in human resources. The strategy for women, thus, focusses on education and training for advancing the role of women in maritime development.

For the implementation of the strategy, IMO encourages donors to earmark special funds for women's training and acts as promoter of awareness and catalyst with respect to innovative activities for women. Its action programme centers on the promotion of special fellowship programmes for women's attendance at national training academies, World Maritime University in Malmo, Sweden, International Maritime Academy in Trieste and the IMO International Law Institute in Malta. The organization has suggested minimum fellowship allocations in each case and, in the case of its Law Institute, has set aside 50 percent of the available places for women.

Related to the training oriented strategy, IMO proposes the development of rosters for women experts in all fields of maritime activity by its Technical Co-operation Division, thus, contributing to dovetailing elements of the strategy and integrating women in all aspects of maritime activity.

The responsibility for planning and managing both project and programme evaluations in IMO is assigned to the Evaluation Unit. In this role, the Unit ensures that the evaluation of IMO-executed technical cooperation activities is in accordance with relevant UNDP guidelines.

Given the strong WID content of IMO's programme, future evaluation exercises that may be undertaken, could not be expected to omit an assessment of this aspect, but the specific methodological development has not yet been undertaken.

Food and Agricultural Organization of the United Nations (FAO)

FAO has had an evaluation system since 1968 as well as an institutionalized Evaluation Service since 1978. The evaluation system is complex and different for both regular and field programmes and guidelines have been compiled for each. The whole system is, however, currently under revision including all guidelines. The revision is expected to fully integrate the WID dimension in all aspects of the system.

The regular and field programmes are also evaluated separately. For the field programmes, a task force of operational and technical staff oversee each project and separate operational and technical monitoring reports are submitted every 6 months. The format is UNDP's for the projects funded by it and FAO's for others. For the regular programme there are: (i) self-evaluation reports by programme managers, reported biannually to the FAO Conference in the "Review of the Regular Programme"; (ii) evaluation of specific programmes, subprogrammes, elements there in or activities that cut across these, involving headquarters and field activities by the Evaluation Service or independent evaluators, reported to the specialized committees; and (iii) special reviews on specific aspects for internal use.

Evaluation of field projects can be: (i) internal by the project management; (ii) ongoing, ex-post or in-depth, jointly by recipient government, FAO and the funding source, with or without the participation of the Evaluation Service but with its involvement in preparing the terms of reference and controlling the quality of reports - about 100 are in process at any time; and (iii) thematic by the Evaluation Service in cooperation with donors and recipients.

In addition, FAO provides developing countries with training and assistance to increase their capability in monitoring and evaluation, and is involved in the development of indicators and methodologies, largely for rural development impact assessment.

However, the organization-wide formal evaluation system does not include WID in a structured manner. A check list of questions, which is given to evaluation missions, only asks whether WID has been considered by the mission. There is no WID content in the paper or basic procedure nor is there in the technical manual on evaluation. There is, however, guidance on how to include a given concern throughout the project cycle as there exists, in draft form, checklists and procedures for each stage as with respect to the environment. These have been produced in loose-leaf form to facilitate a dynamic evolution and will be included in the Policies and Procedures Manual. A similar approach could be taken for WID.

A number of independent departmental efforts have been undertaken to develop and/or apply innovative methodological approaches to evaluation; manuals or guidelines to their application have

also been produced, for example in the People's Participation Projects. FAO has brought out publications on the concept of practical systems of evaluating progress and the degree of participation. The Community Forestry Unit of the Forestry Department has accumulated experience in monitoring and evaluation of participatory forestry project which can be utilized in other projects, particularly agricultural development projects. The Unit's Forests, Trees and People Programme utilizes a participatory approach that applies participatory monitoring and evaluation methods. The Regional Office for Asia and the Pacific has also developed a handbook for training field workers in participatory monitoring and evaluation techniques.

While some of this latter work included women-specific methods and tools, much of it is not gender differentiated. On the other hand, there are ongoing activities to expand women's participation in programmes supported by technical departments and enhance their benefits. Such is the case for example in the Community Forestry Programme of the Forestry Department.

Many of these activities utilize the participatory approach which was given impetus by the World Conference on Agrarian Reform and Rural Development (WCARRD) of 1979 with a view to increasing its relevance to community needs and its effectiveness in project interventions. This approach and the requirements of the WCAARD Plan of Action provided built-in monitoring and evaluation but did not have the initial focus on women. The women's dimension did appear, however, in the activities of the technical department. It has been increasingly important in them as well as in the execution of WCARRD in response to the FAO Plan of Action for the Integration of Women in Development. The last four-year report on WCARRD, in preparation at the time this paper was written, incorporates WID aspects throughout rather than in relation to a limited number of topics or as a separate one.

United Nations Children's Fund (UNICEF)

The basic policy for monitoring and evaluation of UNICEF programmes and projects was laid down by the Executive Board in 1964. Its institutional mechanisms, in place since 1972, include, designated evaluation focal points at some 70 field offices.

The monitoring and evaluation guidelines have since been revised twice, in 1982-83 and in 1986-87, the second time after the Executive Board's request of April 1984 that monitoring and evaluation be strengthened in the field, region and headquarters and that the quality and quantity of exercises undertaken be improved. Accordingly, the corresponding chapter of Organization Policy and Procedures Manual was also revised in 1986. A further revision was undertaken in 1990 in line with the "new directions for monitoring and evaluation" identified at the first meeting of field staff evaluation focal points in June 1989. The new directions are, in turn, consistent with UNICEF's proposed strategy for the 1990s which comprises specific and measurable goals for the well being of children. As strategic priorities for reaching the goals, UNICEF includes implementing a system to track progress, i.e., monitoring and evaluation, and proposes that a set of "human indicators" - such as infants, children under five and maternal mortality rates among others - be utilized to monitor and evaluate attainment of the human goals of the Fourth United Nations Development Decade. UNICEF also includes the empowerment of women for development as a strategic priority for reaching its own goals for children.

Consistent with UNICEF's highly decentralized system of operations, the responsibility for initiating programme or project evaluations and lending support in executions to government recipients of assistance rests primarily with field offices. Regional offices have a direct responsibility in monitoring country evaluation plans and providing support for monitoring as well as training. The responsibility for the Evaluation Office at headquarters includes the setting of policies and guidelines, building organizational capacity in evaluation, training, reviewing country evaluation plans, assessing and disseminating evaluations, and providing technical support. The office initiates about 20% of evaluations which are either thematic or respond to donor requests. In the latter case, the evaluation is undertaken if the recipient government accepts the request which must be made at the start of the project and the cost is borne by the donor.

Evaluations are categorized according to the timing of the exercise with respect to the life span of the project as:

- prospective or appraisal: assessment of relevant feasibility and socio-economic profitability before approval of a project or its extension;
- ongoing: analysis of continuing relevance, outputs and effectiveness during implementation, and
- retrospective or ex-post: to determine relevance, effectiveness and impact after completion.

The following are also undertaken:

- special studies and research: on specific programmes or project issues. They can contribute to programme preparation through analysis of needs, constraints and opportunities, and to evaluations by providing background data.
- situation analysis: at the start of the programming cycle to assess the conditions of women and children in the country.

For the first three types of evaluation the scope is specified during the evaluation exercise itself by choice of the "evaluation question". Impact may be selected as the evaluation question but is only selected for projects of great magnitude in special country situations because of the high cost of survey and other methods of measuring impact and the difficulty in establishing causality between changes in indicators and project interventions. Thus, the process aspects of project performance are usually the focus.

Special studies can respond to specific needs anywhere throughout the programme cycle. These are not a substitute for evaluation but play an important role in providing detailed data and analysis. The methods they use vary according to need, for example, because of a focus on community participation and management, Rapid Assessment Procedures (RAP), a methodology that facilitates obtaining beneficiary views and is both rapid and low cost, has been used increasingly. But to find out how changes did or did not occur, case studies are undertaken. These consist of in-depth analysis by external researchers over a period long enough to allow the use of more rigorous research methods.

UNICEF's policy with respect to WID evolved before 1985 in line with the pronouncement of the various international conferences on women and the aims of the United Nations Decade for Women. In 1985, a policy review entitled UNICEF Response to Women's Concerns was prepared for the Nairobi Conference and presented with a Conclusion by the Executive Board which

requested, inter alia, that UNICEF develop "an internal implementation strategy which promotes accountability in terms both of verifiable objectives and an established time-frame for implementation".[17/]

The strategy[18/] was presented to the Board in 1987. It endeavoured to overcome women's segregation from mainstream development by making the concerns and needs of girls and women intrinsic to programme formulation and incorporating them into national and sectoral planning. It emphasized that women's roles and responsibilities are multi-dimensional and that the programme should accordingly adopt a developmental rather than welfare orientation. At the same time, it allowed for continued development of special projects for women where these were needed as "bridging" devises.

Steps to operationalize it were also proposed in the Strategy, among them the development of a "checklist consisting of key questions to assess whether, and in what manner, the concerns and needs of women and girls have been considered in on-going and planned activities" and the "review of the inclusion of impact of ongoing sectoral programmes on the situation of girls and women".

The strategy placed special attention on monitoring and evaluation among its operational aspects, proposing the development of progress indicators as a basis for systematizing these processes, of " an accountability system ... to demonstrate the extent to which the needs and concerns of girls and women in development and in Child Survival and Development are internalized..." and of "different levels of monitoring and evaluation strategies....". It also contemplated "influencing programme action through guidelines and monitoring". Accordingly, operational guidelines[19/] were issued in 1987 which identifying organizational measures and support activities to be provided by field and headquarters and outlined a tentative checklist of questions and indicators for assessing progress on incorporating women in UNICEF-assisted programmes and projects. The tentative checklist is included as Annex 2 of this paper. In 1989, more detailed Programme Guidelines on Women's Programme were incorporated into the field manual.

The guidelines to operationalize the WID strategy and the checklist have not yet been incorporated into the Policy and Procedures Manual. The Manual has a chapter on monitoring the situation of women and children as it responds to UNICEF's proposed strategy for the 1990s with its emphasis on goals for child survival, development and protection to which goals for women's health, education and nutrition are considered supportive. There is no chapter on women in the evaluation section which deals with concepts, process and methods. In reference to evaluation teams, the Manual states that "if women are the subject of the study" it is usually helpful to include a women as member.

Reports on the progress made in implementing the WID Strategy were submitted to the Executive Board in 1988, 1989 and 1990.[20/] According to the 1990 report, country programmes and activities showed increasing sensitivity to the policy guidelines and strategy although their application in individual countries differed accordingly to local conditions, norms, etc; the major approach to WID was, by far, support of women-specific projects, many of them small, traditional and relatively isolated; for monitoring and evaluation to be effective it was necessary that the checklist of indicators on women be used, tested and adapted to different country situations and that more gender-differentiated data be collected for major sectors as there was a paucity of such data, especially in health.

United Nations Development fund for Women (UNIFEM)

The mandate of UNIFEM is to serve as a catalyst to ensure the involvement of women in mainstream development activities, as often as possible at the pre-investment stage. Its projects, directed to the grassroots level and which focus on the interfaces between economic development and improvement of the situation of women, are largely innovative or experimental in nature. Its activities have been increasingly undertaken through non-governmental organizations involved in community based development.

In the decade of its existence, UNIFEM has accumulated a great deal of experience in project operations and has recognized the need to be able to determine the impact of those activities on women, with particular reference to poor women, in order to ascertain the fulfillment of its mandate. In 1983, it started as a project aimed at developing a system of project information and impact assessment which is known as the "Knowledge Bank".

The Bank is really a model designed to process and store individual project information of two types: (i) "traditional" qualitative and quantitative data from project documents and monitoring reporting system; and (2) data from a specially devised system of impact assessment. Therefore, the Bank is a model that contains two systems:

- Tier I - Information Baseline System which contains project information in abstracted prose and/or coded form on (a) project document progress reports, final report, in line with UNDP practice on project documentation and monitoring, and (b) "contextual" placement of project information - country profile, community analysis and participants profile.

- Tier II - Effectiveness/impact which enters data from a set of "rating" and/or "ranking" procedures. These are: (i) Impact assessments by two Review Committees of three persons, one at the field and one at headquarters, expressed in the form of rating or ranking of project results and arrived at by consensus; (ii) a series of indices that measure the direction and degree of change as derived from questionnaires, Project Participant Information 1 and 2 (PPI)1 and (PPI)2, administered to a sample of participants at start and termination of a programme or project.

The information entered in both systems or tiers is disaggregated into seven core categories (development sectors): economic, social, political/policy, information, technology, participatory mode, and personal which can be further subdivided.

The two systems interact: Tier II uses the baseline information from Tier I for effectiveness/impact measurement. A computerized component (PMS: Project Monitoring Schedule) retrieves and stores their inputs and outputs. This component, therefore, produces three levels of data: Project baseline data, ongoing monitoring/impact data and effectiveness/impact data from the reviewers. The latter are consensual ratings/rankings accompanied by the reasons (descriptor coded and/or in abstracted prose) for them.

The PMS of each project together with the Substantive Abstract of it (a prose summary not stored in the computerized system) constitute the project's permanent record.

The conceptual framework of the Bank was developed in 1983. In 1984, portions of Tier I - project format, community analysis and participant profiles - were designed and tested, and on this basis, a Manual of Procedures was prepared and has been available since 1985. The report on the project was issued in October 1988, as the Bank was ready for impact rating of projects, and by 1990, the instructions for evaluation had been tested and were presented to the Review Committee.

UNIFEM perceives its Knowledge Bank as substantially advancing the art of evaluation in providing "a project-specific impact model which provides a defined and workable set of socially relevant "common denominators" to compare disparate development project inputs and outputs occurring in different time-frames".[21/] It is, however, continuing to assess the concept and system in the light of the new mandate it received from the General Assembly in 1985, to undertake mainstream projects, that is, to act in the capacity of a development agency. The Knowledge Bank synopsis, in diagram and legend form, constitutes Annex 4 of this paper.

United Nations Development Fund (UNDP)

The evaluation system of UNDP has been in operation since the start of the organization in 1966. An Evaluation Division, responsible for development of evaluation policies and procedures, assistance to and reporting on evaluation activities, existed from 1967 to 1976 but was discontinued. The present Central Evaluation Office (CEO) was established in 1983 with similar functions and with the overall responsibility of assisting operational units to strengthen the evaluation capacity of governments.

The evaluation and monitoring system was redesigned and strengthened in 1983-87 in line with the concerns expressed by the governing bodies of the United Nations system, particularly the Government Council of UNDP in its decision 83/12. The evaluation chapter of the Policy and Procedure Manual (PPM) was devised in the process and re-issued in 1987. During this time, evaluation policies were reviewed and consolidated, and the evaluation capacity of governments reinforced with UNDP assistance. Collaboration with other United Nations agencies resulted in the formal introduction, in 1987, of a common monitoring and evaluation system on the basis of which system-wide harmonized requirements could be developed in the future.

All programmes and projects supported by UNDP are subject to evaluations. Evaluation policies and procedures are specified in the chapter on Monitoring, Evaluation and Reporting of the Manual which utilizes the definitions and terminologies of the Joint Inspection Unit (JIU).[22/] According to it, evaluations can be internal (by those involved in any of the stages of the project) or external (by independent evaluators), selectively undertaken and in-depth. Depending on the timing with respect to project cycle, evaluations can be:

- ongoing: in the course of implementation of the project and either internal or in-depth;
- terminal: at or near completion of a project, in-depth;
- ex-post: a period of time long enough, after completion, for evidence of impact to become apparent, requiring in-depth assessment.

In addition, the focus of an evaluation can be: the project, a cluster of projects, a programme (either country or intercountry) or a theme.

Evaluation utilizes as inputs, the outputs of the monitoring system, especially the Project Performance Evaluation Report (PPER) and the Tripartite Review (TPR: government/UNDP/executing agency) reports which are produced annually and at the termination of the project. The procedural linkages are detailed in the PPM as well as the procedures and format for each one of the different types of evaluation. WID issues are, by and large, not addressed in these. Gender questions appear only in three places in the Monitoring, Evaluation and Reporting chapter of the Manual in the section on in-depth evaluation: (1) in the "Objectives" sheet, the percentage of women among beneficiaries; (2) in the personnel and training sheet, the gender of incumbents and trainees, and (3) in the annexes, the gender composition of the evaluation mission.

In the aftermath of the Nairobi Conference, UNDP examined its programmes with a view to strengthen its contribution to women's involvement in development. Consequently, it drew up proposals for future action which were presented to the Governing Council in 1986 and acted upon thereafter. In the field of evaluation, it was proposed to take action to ensure the inclusion of WID issues in all evaluations. In line with this and as a first step, a study was undertaken in 1987 on the treatment of gender issues in UNDP project evaluations of 1985 and 1986.[23/]

The study was focussed on general development projects rather than women-specific ones because although the latter had increased six-fold over the 1972-1986 period, they represented temporary ameliorative measures to bridge the gender gap while WID concerns were not fully integrated in all development strategies, policies and plans.

It was found that although 40 percent of the evaluations mentioned WID issues, they related to projects in fields that have been in traditional women's domains such as community based forestry development or handicrafts; half of the evaluations of income generating or social service projects referred to WID and none of the national planning projects did; and in all domains, evaluation of projects concerned with policy matters ignored WID issues. It was also observed that the treatment of WID issues was unsystematic, scanty and, thus, insufficient to derive recommendations for corrective actions or lessons for the future. Requesting the consideration of WID in evaluation missions' terms of reference (TORs) and the presence of a female in the evaluation team may result in consideration of WID issues in the evaluation at hand.

The findings of the study were considered to be related to conceptual problems in evaluation guidelines and TORs: project effectiveness assessed in terms of stated objectives, not modified by current concerns such as WID; beneficiaries considered but without suggestions to group them and look for differential effects; inclusions of women in the project document under "Special considerations" which does not suggest mainstreaming.

Thus, the next step in putting into practice the 1986 proposal was the issuance, in November 1987, of Women in Development: Policy and Procedures with guidelines for all stages of programme and project cycles. In the field of evaluation, they establish that all evaluations and preparations must consider women's participation, in-depth evaluation missions should include expertise on women, if possible, and evaluation reports must identify the gender of project staff and trainees. A one-page Project Review Form (PRF) is annexed to the procedures for use at each stage of programme/project cycle. It constitutes Annex 3 of this paper.

The guidelines and review form stop short of providing a checklist of relevant questions for each stage or guidance on "how to" achieve what they call for e.g. "elaborate this dimension (WID's)

in the country programme" and "assess whether women's issues have been satisfactorily dealt with". But in establishing the inclusion of a WID section in UNDP's Position Paper for country programming, the production of "country profiles" on women and the training of UNDP staff in WID, a basis for future refinement has been provided, particularly as the PPM continues to be updated.

The above conclusions are corroborated in the 1988 report of the Administrator to the Governing Council[24/] which notes that new approaches in monitoring and evaluation which are not yet developed are required for the consideration of WID aspects. Further, the development of these approaches and of evaluation methodologies for WID is included in the 1988-89 work programme as is the production of an evaluation handbook.

As of 1989, WID guidelines by sector had been issued, primarily intended for the project identification and design stage. They consist of an annotated listing of issues and measures to be considered for each of the ten sectors of UNDP activities which can also be useful to evaluators.

A participatory interactive framework for the planning and evaluation of projects was developed and is being utilized within a UNDP interregional programme called Promotion of the Role of Women in Water and Environmental Sanitation Services (PROWESS) which evolved from the work of the International Decade for Drinking Water Supply and Sanitation. It identifies goals and indicators for community managed water and sanitation projects with central roles for women, establishes an ongoing process by field staff and community people (participatory) and substitutes situational analysis for ex-post/ impact evaluations. Situational analysis focusses on changes brought about by the project and the efforts to make results effective, sustainable and replicable without imputing causality statistically but through user and beneficiary appraisals that can be, but are not necessarily, quantified. The framework is a well developed tool that can be applied to other types of projects within a strategy of community management.

United Nations Educational, Scientific and Cultural Organization (UNESCO)

The evaluation system of UNESCO is based on a conceptual framework approved by Executive Board in 1978 and focusses on integrating evaluation into planning, programming and budgeting process of the organization and on decentralized, self-evaluative exercises.

The system was redefined and a Central Evaluation Unit (CEU) was established, in 1984, in line with the recommendations of a Consultative Working Group on Evaluation Methods and Techniques, convened by the Director-General.

The redefined system comprises three categories of evaluation:

(i) Self-evaluation - Internal, by programme specialists themselves, focused on principal activities within programmes and built into the Programme Execution Plans (PEPs).
(ii) Impact evaluation - Ex-post, external, focused on programmes or groups of activities implemented for long periods based on surveys, studies and consultations.
(iii) Evaluation of activities funded by extra-budgetary resources.
(iv) In-depth studies - On key programme areas, by members of the Executive Board.
(v) Other evaluations, reviews or assessments - e.g. ad hoc, thematic.

Guidelines for the planning and implementation of evaluations in category I were issued in 1986 and revised in 1989. These do not address WID issues in the main text. In the questionnaire forms contained in Annex II, to be used in the evaluation of conferences, meetings, training courses, seminars and workshops, there is a question on the sex distribution of the participants. Women's concerns are also included in the suggested list of questions (or criteria) for programme specialists which is appended to the guidelines for self-evaluation. The report to the Executive Board on Evaluation Activities Implemented in 1984-1985, in discussing the contents of self-evaluation reports, includes a section for data on activities so as to improve access to and participation of women in UNESCO's programme.

In Category (ii), evaluations that have been completed, two reports concern women: Impact evaluation of activities concerning the status of women and promotion of the status of women and Impact evaluation of study and research programmes on the status of women. Both reports were issued in 1987.

There are no UNESCO guidelines for the evaluation of projects which are funded by extra-budgetary sources. These sources are numerous, multilateral and bilateral, governmental and non-governmental, and their funds are applied to development co-operation projects. The evaluation of these projects generally follow the funding organization's rules and procedures.

United Nations Industrial Development Organization (UNIDO)

UNIDO became a specialized agency in 1985 and its evaluation system for technical cooperation projects has been put in place since then. It is comprised of:

- a built-in self evaluation for all projects, at least annually, according to UNDP's Project Performance Evaluation reporting system.
- thematic evaluations undertaken jointly with UNDP since before its designation as specialized agency.

These are the basic guidelines for evaluations as contained in the Manual of Policies, Procedures and Guidelines for UNIDO-executed Projects and Programmes and are harmonized with UN and UNDP terminology and methods. However, they have no WID content.

Principles and policies on WID existed in the organization since 1975, but it was a resolution of the Fourth General Conference in 1984 that gave direction to the policy of integration of women in industrial development. In 1987, the development of a strategy for ILO's medium-term plan on WID was requested by the Industrial Development Board and the General Conference; further resolutions and decisions adopted between 1984 and 1988 determined that guidelines be utilized for all stages of technical cooperation and studies programmes and women be extensively covered in data collection.

The strategy developed for the Medium-Term Plan 1990-1995 seeks to institutionalize within UNIDO's staff the ability to address women's issues and to elaborate operational procedures for the inclusion of gender-specific indicators in the design and implementation of activities in four areas: industrial planning and human resource development, agro-industries, small scale industries and the development of appropriate technologies.

The "Guidelines on the integration of women in UNIDO technical cooperation projects and in industrial studies programmes and research", published in 1986, broadly compiled the basic considerations to be addressed in each phase of the project cycle and check list to facilitate the application of the guidelines. Upon application they were found to lack specificity for industrial sectors and for particular types of projects within them. Furthermore, their application was hindered by lack of understanding and acceptance by the staff.

The institution of a Programme for the Integration of Women in Industrial Development 1990-1995 responded to the need to develop sector-specific guidelines and to sensitize the staff. The two aspects are addressed by it, in a systematic, cross-sectoral manner, involving three features: systematizing the development guidelines, tools and procedures; operationalizing the approach to women's integration; and institutionalizing and building institutional capability to undertake integration throughout the project cycle, at headquarters and at field levels.

Current work concentrates on the design, selection of priority sectors and systematic compilation of lessons learned, data as well as research literature.

Implementation of the Programme is being held by the Unit for Integration of Women in Industrial Development, formed in 1986. The Unit works and co-ordinates with substantive divisions which are directly responsible for projects. It also plans to attach some of its experts to strategic branches for varying time periods. In the field, it seeks to help develop national capabilities to integrate women in all aspects of national institutions and NGOs.

The Unit has begun the process with the design phase, by the development of a planning framework based on analysis of factors and issues, at two levels: first, the context in which a project operates - social, legal, economic, geographic, etc; and second, the project itself - participants and beneficiaries and their profiles, women's productive roles, pre/post-project, how and where they perform them, and under what conditions and constraints, women's needs and strategies to address them, etc. The Unit considers this is the beginning of a longer-term institution building process that will culminate in the routine inclusion of women and gender issues and analysis in all phases of UNIDO's programme.

United Nations Institute for Training and Research (UNITAR)

The assistance of UNITAR to developing countries comprises exclusively training activities in the field of diplomacy. The main activities are courses and seminars conducted either at headquarters or in the field for developing country participants.

In the case of courses designed for a given country's officials and conducted in the field, participants are selected by the respective government. In other cases, participants are selected by UNITAR from candidates submitted by governments and UNITAR does request that special attention be accorded to proposals for women candidates. Aside from this, the training is gender neutral.

Training activities are regularly evaluated but there are no methodological or procedural guidelines. Evaluation tools are adapted to each case, depending on the nature of the course or seminar.

United Nations Population Fund (UNFPA)

UNFPA evaluation guidelines must be reviewed in the context of the organization's policy of providing assistance within the framework of a programme and of the programming process that operationalizes the policy. The consideration of WID in evaluation must be regarded in the light of the evolution of the women's policy in the programming process.

Up to 1989, the first stage of the programming process was the Population Needs Assessment (PNA) at the country level assisted by a UNFPA-sponsored mission. Since 1989, PNAs have been replaced by Programme Review and Strategy Development (PRSD) missions. The formulation of a UNFPA-sponsored Country Programme (CP) follows on the basis of PRSD recommendations and within the national population strategy. The CP must be approved by the Governing Council.

Project formulation missions assist the country in formulating individual projects contained in the programme which are appraised first by the Representative at the field office and then at headquarters prior to approval by the Programme Review and Allocation Committee (PRAC) or the Governing Council.

Guidelines for the PNA exercise and CP formulation were issued in 1979 in a preliminary form, made final in 1980 and substantially revised in 1985. The current guidelines for evaluation of CPs were developed in 1986-1987.

The guidelines for project formulation (UNFPA/19) have been thrice revised, the last time in 1986, and those for monitoring and evaluation of projects and programmes were re-issued in 1986.

With respect to WID, UNFPA prepared a policy paper in 1976 in response to concerns expressed at the World Population Conference of 1974 in Bucharest and the Women's Conference of 1975 in Mexico City. This paper, UNFPA Policies and Programmes in the Field of Women, Population and Development, endorsed by its Policy Committee in 1980 and validated by the Governing Council in 1981, constitutes the "Guidelines of Women" of the organization.

The Guidelines on Women were taken into account in the revision of the guidelines for PNA and CP formulation and in those for the new PRSD systems. To the existing provision that the reports contain a chapter on Women, Population and Development (WPD), another was added to include the women's dimension in all programme categories and projects.

With respect to evaluation, the Policy Committee had issued a decision in 1982 requiring that evaluations "as far as possible take into account the role of women" but the 1984 inter-organizational assessment undertaken under UNDP coordination[25/] concluded that inadequate guidelines and lack of integration of evaluation into project structure throughout the system had permitted continued failure to recognize women's role in projects and impeded the identification of project effects on women as stated in Chapter I. Some of these findings applied to UNFPA: none of the guidelines made any reference to WID issues i.e., the guidelines for CP evaluation or monitoring and evaluation of projects and programmes or the newly developed 1984 UNFPA Guidelines and Procedures for Independent, In-depth Evaluations.

Consequently, UNFPA undertook a comparative study of its evaluations results[26/], the revision of UNFPA/19, the project formulation guidelines, and the development of the Guidelines for

Evaluation of the Women's Dimension in UNFPA Assisted Programmes, all of which were issued in 1986.

The comparative study identified a number of important problems with respect to women's incorporation in programmes and projects: women were overlooked in many projects; projects designers' lack of attention to women's concerns had a negative influence on project effects; the participation of women as agents in projects was extensive but the effects the projects had on them were not monitored; they were also the main beneficiaries of maternal and child health/family planning activities but no research was available on how to make these services more responsive to their needs.

In order to correct the problems identified, in 1987 UNFPA proposed a four-year strategy for the complete integration of women's concerns into every aspect of its programme and the increased participation of women in UNFPA-supported projects. Among the activities to be undertaken, the first was the revision of project and programme procedures and guidelines. Under this topic, paragraph 25 of the strategy refers to the newly developed WID evaluation guidelines, all aspects of which "will be taken into account and acted upon accordingly".[27/]

At present the UNFPA system retains evaluation guidelines that do not address WID concerns but are supplemented by WID evaluation guidelines that address those issues in reference to directives in the programme and project formulation guidelines. The evaluation system comprises, according to this approach, two types of evaluation: (i) built-in evaluation (which must be part of a project's plan) and (ii) independent, in-depth, ad hoc evaluations.

According to which party evaluates, there can be: self-evaluation, task-force or peer group evaluation, central evaluation by a specialized evaluation unit and outside evaluation.

In-depth evaluations concern: individual projects (country, inter-country or global), a programme or are comparative.

The system's follow-up mechanisms include the implementation of recommendations by the respective divisions and branches, and an assessment of the status of implementation of the recommendations by the Evaluation Branch one year after the evaluation and analysis of findings by the Evaluation Branch for decision-making purposes.

The WID guidelines for evaluation provide general questions for evaluating each aspect of a programme and checklists for specific programmes. They are distributed to all members of the evaluation team, referred to in most terms of reference for these teams and supplemented by inclusion of a WID session in briefings conducted at headquarters before the mission starts its assignment.

In 1989, the UNFPA Women's Unit completed a study of in-depth evaluation exercises undertaken since the publication of the WID guidelines in 1986. This established the extent to which the guidelines had been followed, thereby, taking into consideration the women's dimension in evaluations. In this respect, very uneven results were found with few evaluations being very analytical of women's issues, many tending to discuss these only in terms of planned objectives and activities, and many others failing to make recommendations for subsequent project phases and future projects. The study recommended further work on the guidelines, adding checklists for specific technical aspects within existing programme areas and possible blending of the WID guidelines into those for

programme and project evaluations in order to avoid the perception of women being an additional special consideration, and not a mainstream programme aspect.

United Nations Institute for Social Development (UNRISD)

The Institute conducts research on "problems and policies of social development and economic development during different phases of economic growth". Its studies support the work on social and economic policy and planning of the United Nations Secretariat as well as regional institutes under United Nations auspices and national institutes. Studies are produced by independent researchers working in collaboration with Institute staff and are generally large and in-depth undertakings. Among those completed, two are related to monitoring and evaluation of field programmes and projects issues.

United Nations Interregional Crime and Justice Research Institute (UNICRI)

UNICRI (until 1989 was known as UNSDRI) does not have a standard methodology for evaluation but has an evaluation component in a number of its projects. This component, however, is not always focussed on an assessment of the effectiveness and impact of the project itself.

The Institute offers courses and undertakes research on criminal justice topics as well as evaluates some of its courses. Research undertakings are more likely to deal with evaluation as a subject of analysis or to evaluate a specific area of importance to the research topic. For example, within the "Development and Crime Pilot Project in Yugoslavia" particular attention was given to evaluation of criminal policy during the last 20 years.

Training in evaluation research has been offered for example within the "Training Course in Research Methodology in Criminal Justice" and the Institute's work programme for 1991 includes a project on "Evaluating Non-Custodial Sanctions, a Literature Survey".

United Nations University (UNU)

The focus of UNU's programme of activities is on research and training, and evaluation constitutes a regular feature built into the programme in line with the "Principles and Policies for Programme Planning, Implementation and Evaluation" adopted by its Council.

The Principles establish that "evaluation methods shall be adapted to the nature of the programme being evaluated and may be conducted internally or externally". Accordingly, no detailed guidelines have been developed. Two types of evaluation are undertaken:

- Internal: peer review of research and training projects and activities to assess performance in implementation and quality of the outcome through workshops by steering or equivalent groups or through review of manuscripts;
- External: summative evaluation upon completion of a project by experts not involved in its design or implementation for projects selected by the Executive Committee. An evaluation programme and methodology are developed case by case within the framework of the Principles.

To support evaluation, a programme monitoring system and a database on UNU's activities are being established. It will include information on programme development and results on both types of evaluation.

Universal Postal Union (UPU)

UPU's programme of technical assistance involves two types of activities: training, either through seminars and short courses for postal administrators from a number of countries in selected host countries or through fellowships, and assignment of experts or consultants to recipient countries, mostly in the context of specific projects of assistance.

The Executive Council of UPU had increasingly stressed the need to establish the effectiveness and impact of the organization's technical assistance activities and, in its sessions from 1970 to 1973, issued directives in this respect as well as considered proposals on evaluation procedures. The system that has been in place since then can be summarized as follows.

(i) Evaluation of training activities: seminars, short courses, fellowships; UPU questionnaires to:

- trainees at end of training on nature, appropriateness of content, methods, organization of activity, etc.;
- fellowship recipients, one year after training, on professional benefit, applicability of knowledge acquired, etc.;
- Government, at end of training, on nature, appropriateness of content, duration of activity, etc.;
- Government, some time after reincorporation or new posting of trainees, on type of assignments, changes observed, application of new learning, etc.

(ii) Assessment of effectiveness of experts/consultants - UPU questionnaire to recipient government on activities performed and qualitative assessment of concrete results brought about by them.

In the case of multilateral funding projects, formal tripartite evaluations (Government, UPU, funding agency) are conducted with funding agency procedures.

The questionnaires described, which are administered ex-post except for the first one to trainees, constitute the basic inputs to UPU evaluations. These are supplemented by interviews conducted by UPU staff during missions. WID issues have not been considered. It should, however, prove relatively easy to add WID questions to the appropriate sections of the questionnaires.

The World Bank

The World Bank initiated a new approach to WID and it established a Women in Development Division within the Population and Human Resources Department of its Policy, Planning and Research complex in 1987.

The analytical work of the WID Division was initially focused on supporting operational activities. However, at present the Bank's regional operations departments - which formulate Bank investment projects - have a WID capacity and a Regional WID Coordinator is in position in each

region; thus, the Division is shifting its emphasis to research and policy. It plans, for example, to investigate the achievements of Bank operations in terms of WID through missions to selected ongoing operations to be followed by impact studies. These will be quantitative, based on methodologies tested by the WID and other divisions of the Bank.

The evaluation system of the Bank is centered in the Operations Evaluation Department (OED), which has financial/auditing as well as evaluation supervision of operational programmes and projects. OED selects those to be independently evaluated on the basis of the review of some 300 Project Completion Reports (PCRs) prepared annually by operational staff in collaboration with recipient governments. It reports on the evaluations hrough Project Performance Audit Reports (PPARs) which are sent directly to the Board of Directors by the Director-General, Operations Evaluation, who oversees the evaluation system. The focus of the evaluations is on appropriate use of funds, fulfillment of the objectives as designed in the project document and efficiency. However, there is no systematic consideration of WID. Currently OED prepares PPARs for 100 percent of completed policy-based lending operations and about 40 percent of completed investment projects.

OED also undertakes special studies on important issues in countries, across countries, in sectors and impact evaluations of operations completed several years before. Recent examples are the reports on the Bank's experiences in rural development and with irrigation projects where effects on women have been highlighted.

Not specifically in the area of evaluation, some related activities in other departments also focus on women. The Legal Department has initiated country case studies of legal issues of particular importance to women. The Industry and Energy Department has appointed a WID specialist to help integrate women's issues into energy related projects. Within the Population and Human Resources Department, the divisions of Education and Employment, Population, Health and Nutrition, and Welfare and Human Resources are engaged in collaborative efforts on WID issues in their respective fields. The Economic Development Institute has its own WID Coordinator and focuses on training specifically designed for women as well as on making their mainstream training more gender sensitive.

World Food Programme (WFP)

Projects for WFP assistance are selected by the Operations Department assisted by the Project Design Service which has a monitoring and evaluation officer; but evaluations are the domain of the Evaluation Service (EPE).

EPE initiates the arrangements for evaluation missions, prepares the terms of reference, circulates them for comments and, together with technical experts from the collaborating organizations, participates in missions. Evaluations can be:

(i) Operational: Mandatory, i.e. provided for in the plan of operations or other official provision; Evaluation-cum-appraisal, i.e. in response to project extension requests at about three-quarters of the way to project completion; Terminal.

(ii) Programme and Policy Oriented: Ex-post; Sectoral or Thematic; Comparative Project Evaluation; Country Programme Evaluation; Analysis/Synthesis Project Completion Reports.

There are no evaluation guidelines. Missions are guided by terms of reference and outlines for evaluation reports which include a WID theme. The organization's emphasis is on project design. EPE does not consider separate evaluation guidelines to be crucial since evaluators must refer to what is in the design and there are detailed general guidelines as well as sectoral guidelines on WID for the project design phase.

The sectoral WID guidelines comprise a conceptual introduction on gender differentiation and analysis; a list of relevant issues to be analyzed and assessed, step by step, for eight major sectors which is to help fine-tune the activities and objectives in a manner that is gender-responsive; a baseline check list to be used to signal gender-responsiveness at the project identification stage and two "gender analysis matrices". The matrices help identify: (i) activity profiles i.e. contributions to production of goods and services and to reproduction of human resources and (ii) access to and control of resources and factors of production as well as project benefits, the first for males and females, adults and children, by type of production and the second for men and women by socio-economic group.

The project design guidelines help operationalize WFP's Food Aid Strategy for Women in Development. These are based on the premise that attention to gender "increases the likelihood that a project ... will be compatible with, reach and be sustained by, those whose activities are essential for its success". They seek to restructure approaches and adapt delivery mechanisms in relation to women's resources and constraints in their productive and reproductive roles as these are different from those men.

EPE has found that the WID matrices are generally applied in the cases of production projects or those that have production components. They are not health and training projects for which differentiating all the elements by gender is more difficult, particularly since WFP's inputs is one of many. Because WFP's intent is tagged onto to a sectoral or subsectoral project in order to attract, hold and enhance participation, it is difficult to isolate the benefits from it alone. Furthermore, some 75% of all projects are third or fourth generation and baseline data do not exist. Thus, the possibility of evaluation is limited. The emphasis has to be placed on design.

EPE believes given a good project design, methodological tools of evaluation are still lacking. The crucial questions are where and how to get the necessary information but these questions have not been addressed. This has been addressed in the context of seminars on the newly adopted project cycle, within which a module on gender issues has been built that introduces conceptual aspects and some methodological tools.

EPE considers that the next step could be the identification of project experience of recurrent gender issues by type of project and/or sector leading to the elaboration of "methodological kits" for evaluation missions.

The ultimate objective is that all projects be assessed in terms of their direct or indirect impact on women's activities, outputs and incomes in the targeted area i.e. be specifically determined whether they contribute/have contributed to strengthening or undercutting major areas of women's economic activity and, if the latter, whether they provide support for alternative employment that maintains and expands women's outputs and incomes.

World Metereological Organization (WMO)

The technical cooperation activities of WMO cover all aspects of its meteorology and operational hydrology programme and focus on assistance to countries for development of services in these areas, on training and on institutional development to further self-reliance.

WMO cooperates with other United Nations, intergovernmental and non-governmental organizations in carrying out its scientific and technical programmes. Its technical co-operation activities are funded by UNDP, the Voluntary Cooperation Programme (VCP) and trust funds in addition to its regular budget.

The Field Operations Manual, issued in 1988, covers all aspects of technical co-operation. The chapter on "Reports" details the monitoring and evaluation process which is used for UNDP funded projects. For projects implemented under the Voluntary Contribution Programme, evaluation consists of annual reports from the directors of the beneficiary services for up to five years after project completion. The general methodology of UNDP does not, as has been described in the corresponding section above, contain WID references and there is no statement in the WMO Manual that WID considerations are made in VCP annual evaluation reports.

World Health Organization (WHO)

The regular programme of WHO as well as its assistance to countries are guided by the Global Strategy for Health for All by the Year 2000 proclaimed by the Thirtieth World Assembly in 1977. Primary Health Care was defined as the key element in attaining this objective by the Declaration of Alma-Ata, in 1978.

WHO's role is to assist countries in the establishment and management of health systems geared to primary health care as an integral part of their social and economic development. Monitoring and evaluation of WHO's activities as well as of the implementation of the Global Strategy have been stressed since the start and a reporting system for the latter is in place. Evaluation is also undertaken both to ensure the efficiency of project assistance and for reporting to donors. In addition, there are managerial and financial needs that are met through the evaluation system. Accordingly, the system comprises the following: self-evaluation, management studies/organizational evaluation, external reviews, Health for All Evaluations and internal audits. The first four are reviewed in the following paragraphs.

Self-evaluations are done by programme managers according to the conceptual framework and principles published in 1982, Health Programme Evaluation, Guiding Principles, and in reference to the Biennial Programme Budget. Until 1990, this budget was prepared on the conceptual basis of the Guiding Principles.

The Guiding Principles address programme development and evaluation, offer lists of indicators, relevant questions on different programme aspects, criteria to be used as well as "how to" examples. However, while evaluations performed by the community, verification of social relevance and assessment of impact are discussed, the women's dimension in all these aspects is not included.

Until recently, a committee reviewed evaluations on headquarters programmes alone and reported to the Director General but this was found to be an insufficient system of ensuring appropriate feedback for programme improvement. The evaluations were judged to be of varying quality and the methodology not sufficient for attaining uniformly high quality evaluations.

Currently, the process of preparing the biennial proposed Programme Budget is being revised. Using the Guiding Principles as the conceptual basis (not the methodology), well defined objectives were developed in 1990 for some 54 areas, in each of which there are programme activities and/or commitments made by WHO in forums and with other organizations. These objectives will replace the broad goals represented by the general statements of long-term aspirations that previously justified budget allocations but did not allow the monitoring of any progress. For each objective, goals or targets as well as the corresponding indicators are also being specified. WHO also requires that these global level goals be complemented by country "National Basic Minimum Needs" with appropriate indicators. A few countries have already compiled this information. Since WID is recognized as a commitment that cuts across programme areas, this new system is expected to facilitate follow-up.

Management Studies on specific programmes are undertaken by the Office of Administrative Management and Evaluation upon request from headquarters or the regional offices. The purpose is to assess the efficiency of management and revamp it, as needed. Specific micro-problems are also dealt with, if required. The approach is similar to private business consulting with internal programmes as clients.

Organizational evaluations are narrower assessments focussed on management efficiency with respect to specific objectives. These evaluations preclude the inclusion of out-of-the-focus issues, such as WID, unless an organizational evaluation, within a specific programme, focussed on WID.

External Reviews of activities funded by extra-budgetary resources are coordinated by the External Funding Programmes Division and are usually sponsored by donors. They are undertaken by integrated teams of external consultants and WHO technical staff with specific terms of reference. WHO is highly decentralized. The six regional offices manage autonomous regional assistance programmes. External reviews of projects within these programmes are their responsibility and there is no separate set of guidelines for them. Thus, reviews vary in scope and quality, not only between regions but also between programmes in any one region, and there is no mechanism for a WID focus across them.

Health for All Evaluations are undertaken every six years. Monitoring of the Global Strategy is reported on at three-year intervals. A Common Framework and Format (CFF) was developed in 1982, for evaluation purposes, in order to assist member governments to collect and analyse necessary information and report to regional committees. The evaluation reports are then compiled by WHO for submission to the Executive Boards and the World Assembly.

The CFF contains a list of indicators which is considered the minimal countries can use and which some may want to expand. For the second evaluation in 1992, indicators have been reformulated, sex disaggregation has been added for some and sub-indicators on maternal/child mortality and on family planning have been included. The report will refer to gender differences although no directive was issued for countries on gender analysis. While WID is not a specifically mandated topic, it could be made one for the third evaluation.

According to WHO's analysis[28/], with respect to WID in general, the organization has passed through three stages in pursuing the principle of integrating women in all programmes and activities: (i) a stage of policy development and resolution, 1976-80; (ii) the creation of integrating mechanisms in the organization and in countries 1980-1985; and (iii) incorporation of the concept of integration in practical activities 1985-1990.

The resulting activities have been structured into a specific cross-sectoral programme on Women, Health and Development (WHD) which has three lines of action: the promotion of the health of women and of women as beneficiaries of health care; that of women as providers of health care; and that of women's education and status as a means to enhance their contribution to health and socio-economic development.

The Executive Board of WHO is mandated by resolution of the World Health Assembly (WHA 38.27 of 17 May 1985) to monitor developments in the field of WHD. To facilitate this, a Steering Committee on WHD was organized in 1985 with the participation of the majority of Division Directors.

The Committee has circulated to programme managers a "Framework for Assessing Women's Aspects of Health Development Programmes". Also called a "checklist", it suggests ways of looking for and at women's aspects as part of the managerial process, in three parts. Part I calls attention to risk factors for women's, children's and family health in the areas of women's social and economic roles and their access to and control of resources. Part II lists specific questions on women's issues as they apply to specific programmes, projects or to the overall managerial process in the health field; examples of issues are needs assessment, priority setting and distribution of programme resources. Part III contains questions and some indicators on women's participation in the health system.

The framework is primarily meant as a programming and monitoring tool but Part II contains questions that are of relevance to evaluation and should serve as a basis for the development of guidelines.

In practice, consideration of WID is advancing slowly depending on the degree of awareness of the managers of individual programmes. The selection of WHD as the topic for the technical discussion during the Forty-fifth World Health Assembly in 1992 is expected to energize the application of the framework by greatly increasing the level of awareness and knowledge.

CONCLUSIONS

General Observations

The foregoing review included 22 organizations of the United Nations System (UNOs) and 8 organizational units of the United Nations Secretariat. The latter are the regional commissions, UNDTCD, UNCTAD, UNHCS (Habitat), UNDRO, UNEP, UNHCR and UNRWA all of which either have programmes of assistance and/or act as executing agencies or executive agents for funding organizations.

The following table summarizes the existence or lack of evaluation guidelines (EGs) in the organizations and the status of WID consideration in each case; the categories into which they can

be classified are: no consideration at all (groups 1 and 3), consideration in the evaluation guidelines (group 4), consideration in separate women's guidelines (WGs) for evaluation (group 5) or consideration in some other (not evaluation specific but related form (groups 2 and 6).

UNOs Group	Status of EGs and WID consideration	No. of UNOs
1	No EGs / No WID	8
2	No EGs / WID consideration in other form	7
3	EGs / No WID	5
4	EGs / WID in EGs	2
5	EGs / Separate WID-EGs	1
8	EGs / WID consideration in other form	8
	Total of UNOs	31*

* The regional commissions are separated in two groups, one with EGs and WID in them and the other without EGs and WID considered in another form.

The table shows that the UNOs are divided more or less equally between those that "have" and those that "have not" developed their own evaluation guidelines. Among those that "have not", there are fifteen organizations. These include research organizations for which use of *ad hoc* methods of each research project is considered more appropriate. The two regional commissions ECA and ESCAP, UNCHS (Habitat), ICAO and UNESCO, with respect to its extra-budgetary programme, evaluate programmes with other agencies procedures, mainly UNDP. UNITAR and the World Bank regularly evaluate their activities but have no standard methodology or manual. UNDRO regularly carries out assessment by using its own response to disasters. WFP obtains systematic evaluations and promotes the inclusion of women, not through evaluation guidelines, but through those for project identification and design. Thus, practically all UNOs place importance on evaluation and evaluate their programmes and projects.

However, the majority of UNOs do not consider WID dimension in evaluation. Thirteen make no mention of women, whether they have evaluation guidelines or not; another fifteen consider WID issues but not directly in evaluation and through evaluation specific guidelines. This group includes UNDP, whose procedures are utilized by several other organizations. UNDP's Women in Development: Policy and Procedures does not constitute guidelines for the consideration of women in evaluation; its directives in this respect are limited.

There is, nevertheless, evidence of a positive response to the Nairobi Forward-looking Strategies call for the integration of women in development. Some of the organizations that have not developed checklists of questions and "how to" instructions for the inclusion of a women's dimension in every programme/project stage engage in special studies on women's topics of direct interest to them (ESCAP, UNESCO) and some have issued policy statements or adopted new approaches (UNDP, World Bank). Furthermore, there are six organizations which have stated strategies on WID: ECA, UNICEF, UNFPA, UNIFEM, WHO and IMO; and six others which have developed guidelines for evaluation of the women's dimension: ECLAC, UNICEF, UNFPA, UNIFEM, WHO and IFAD.

The methods and procedures developed by organizations that have evaluation guidelines are generally harmonized with the United Nations Manual and the JIU terminology. Nonetheless, there are some differences. For example, some organizations list appraisal as a type of evaluation while most follow the United Nations Manual's lead in considering this as a distinct phase in which the logical and operational structure of a proposal is analyzed and potential outcomes, effects and impacts are projected on the basis of an assessment of the current situation and needs. Similarly, the definition of ex-post evaluation by some of the organizations corresponds to that of impact evaluation for others; and for yet others, impact evaluation requires that a significant period of time should have lapsed since the completion of the programme or project. This raises, therefore, the need to establish causal linkages between observed changes and project interventions. In this context, it should be noted that the differentiation between project effects, which are observable changes such as physical, organizational, attitudinal, etc. directly attributable to project activities, and project impact is not always made; and in some cases, impact is referred to in the context of monitoring.

All the organizations that have developed evaluation guidelines, except one, utilize the United Nations and UNDP approach. This involves providing, in the form of a manual, a guide to systematic application of uniform procedures and documentation, and to methods of analysis and quantitative techniques which can be applied flexibly in different areas and contexts, and to different types of activity. The provision of checklists of issues to consider, questions to ask, indicators to rely on, etc., is, in this approach, suggestive, not directive. The one organization with a different approach (which, however, incorporates aspects of that of the UN) is UNIFEM, which has recently published its Knowledge Bank report.

UNIFEM's Bank is a model and, therefore, must identify not only the areas of inquiry (seven core categories or development sectors) but the indicators to use and techniques to measure changes (ranking or rating of the direction and degree of change, and indices derived from questionnaires administered to samples of participants), so that measures of impact can be derived which are comparable for different projects in different settings. The requirements of reliability and validity of the ratings and indices used is met in this system by: (1) the use of committees of reviewers or evaluators who first rate independently and then are required to reach a concordance in rating; (2) the averaging of ratings by two different committees, one each at field and headquarters; and (3) the administration of participant questionnaires at the start and finish of a programme or project. Other organizations with larger programmes of wide scope and a great variety of technical requirements may find the system too costly or administratively demanding but these and other impediments to possible replication must be studied in the light of UNIFEM's experience and other organizations requirements.

The guidelines that have been developed for consideration of the WID dimension in evaluation are generally collections of questions and issues to be raised ("checklists") in the case of mainstream projects, that is, projects not specifically for women. Women's projects would presumably be evaluated according to general evaluation guidelines. Only UNIFEM, whose projects are all directed to women, can be said to have a methodology for evaluating these projects. Furthermore, WID guidelines do not provide instructions on how to, for example, develop indicators or determine effects or impact. Existing methodologies for doing this must also be reviewed from the WID perspective and, if necessary, modified to include it, or adapted for evaluation of women-specific programmes and projects.

This review has been circumscribed to guidelines and methodologies, but information on results of application of WID evaluation guidelines has been available from two sources, UNICEF and UNFPA. In the case of UNICEF, internal memoranda and the 1988 progress report to the Executive Board combine to indicate that, despite the issue of the WID Strategy and of procedures to operationalize it, there are many instances of failure to apply the latter, particularly where senior field managers are not actively supportive of WID initiatives. The UNFPA recent study of evaluations conducted since 1986 concludes that in a significant number of cases women's concerns are taken into consideration only in that they are part of the project design, in others they are not, and in some others analysis is limited, giving the impression that women's issues were not intrinsic to the exercise but special, additional issues.

UNICEF and UNFPA observations point to the importance of integrating women's dimension at the formulation stage. But, given that the majority of programmes and projects have been developed without such a dimension, they also lead to the conclusion that it is necessary to refine evaluation procedures, so as to provide a means to identify the missing components and modify design. In the case of some UNFPA projects of relatively high technical content only general questions were raised at evaluation, indicating that it may be necessary to develop checklists of issues and questions specific to those particular technical aspects. The same may be true for other organizations' technically complex programmes/projects.

Suggestions for further development

The experience of evaluating field activities with a WID perspective being so new, it seems necessary to require that, in cases where the projects or aspect thereof have no relevance to women, the evaluators explain why this is so, and not simply pass over the issue. This may counteract the observed tendency to discuss women's issues only if they were part of project design.

The contextual setting of an activity is of central importance for its implementation. Programme/project designers', appraisers' and evaluators' tasks would be greatly facilitated and the quality of their results enhanced if WID country profiles were available to them. Some organizations, notably UNDP and UNIFEM, have taken steps in this regard, but profiles are not generally referred to in the guidelines reviewed.

WID country profiles should provide baseline information, descriptive if quantitative data are not available, on economic, social, and relevant politico-legal aspects of the situation of women, e.g. on the demographic situation, employment, division of labour, access to resources, education, property, health services, traditional position of women, women's organizations, changes that are in motion, resistance to change. Thus programme or project induced change could be assessed in reference to an existing baseline picture, not one that is developed in the context of preparations for an evaluation. At present this is often the case.

The thrust should be to integrate women into programmes and projects beginning from the developmental and design phase, and evaluations should point to the existence or lack of corresponding arrangements for management of the implementation of women's components, to the adequacy of provisions for any special costs of integrating women in the programme/project, and to the provision of mechanisms for developing new - not initially expected - components to integrate women in ongoing activities as a result of evaluation findings.

In some cases, where evaluation missions find it not possible to analyse the WID dimension sufficiently, because of information or time constraints or lack of experience with the issues, it may be appropriate to consider the provision of short-term consultants to assess this aspect and advise on necessary programme/project revisions or lines of future programme/project development.

The provision of WID guidelines or manuals to evaluation missions should be supplemented by in-depth briefing on the issues involved, along with explicit and detailed terms of reference on the WID dimension of the corresponding evaluation.

It may also be appropriate to consider the composition of evaluation missions, so that at least one member will be familiar with WID issues in field activities.

The diversity in the scope of activities and in the technical requirements of the different UNOs bars the development of any single methodology or set of guidelines. What is necessary is to further harmonize the terminology and conceptual framework, to refine checklists and to expand them in consideration of programme areas thus far not covered by them, to develop a WID perspective in methodologies for the analysis of project impact, and to develop special methods, where needed, for the evaluation of women-specific programmes/projects.

Notes

1. Report of the World Conference of the International Women's Year, Mexico City, 19 June-2 July 1975 (United Nations publication, Sales No. E.76.IV.1), Ch. II, sect.A.

2. Report of the World Conference of the United Nations Decade for Women: Equality, Development and Peace, Copenhagen, 14-30 July 1980 (United Nations publication, Sales No.E.80.IV.3 and corrigendum), Ch. I, sect. 4.

3. General Assembly resolution 35/56, annex, para. 51.

4. World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality Development and Peace, World Survey on the Role of Women in Development, Report of the Secretary General A/CONF.116/4 and A/CONF. 116/5 and Adds. 1-14), later published as World Survey on the Role of Women in Development (A/CONF.116/4/Rev.1, ST/ESA/180, United Nations publication, Sales No. E.86.IV.3).

5. See document in Note 2, para. 232.

6. See document in Note 1, para. 51(b).

7. United Nations Development Programme, Women's Participation in Development, an inter-organizational assessment, New York, June 1985.

8. Ibid., Ch. II, p.12.

9. Ibid.

10. Ibid., pp.12-13.

11. The Nairobi Forward-looking Strategies for the Advancement of Women. As adopted by the World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development and Peace, Nairobi, Kenya, 15-26 July 1985.

12. See the following resolutions of the General Assembly: 32/197 of 20 December 1977 on Restructuring of the economic and social sectors of the United Nations system, Annex VI,5; 36/228 of 18 December 1981 on Programme planning; 37/234 of 21 December 1982 on Programme planning; 38/227 of 20 December 1983 on Programme planning and co-ordination within the United Nations system; 39/238 of 18 December 1984 on Programme planning, and 40/240 of 18 December 1985 on Programme planning.

13. Joint Evaluation Unit, Glossary of Evaluation Terms (JIU/REP/78/5).

14. ECLAC, Women in Development Guidelines for Programme and Project Planning, Santiago de Chile, 1982.

15. ARCC is the African Co-ordinating Committee for the Integration of Women in Development.

16. IMO, Strategy for the Integration of Women in the Maritime Sector, May 1988.

17. Conclusion on "UNICEF response to women's concerns" (E/ICEF/1985/CRP.37.Rev.2) and UNICEF's response to women's concerns (E/ICEF/1985/INF/3).

18. Implementation Strategy for UNICEF Policy on Women in Development (E/ICEF/1987/L.1).

19. PRO/CF/PD-1987-003, 10 April 1987.

20. Progress Report on Achievements Made in the Implementation of UNICEF Policy on Women in Development (E/ICEF/1988/L.1, 9 February 1988).

21. Silvert, Dr. Frieda, Unifem's Knowledge Bank, UNIFEM Occasional Paper No. 8.

22. See Note 13.

23. UNDP, Central Evaluation Office, Women in UNDP-supported Projects, A Review of How UNDP Project Evaluations Deal with Gender Issues, New York, May 1987.

24. Programme Implementation, Evaluation, Report of the Administrator (DP/1988/14), 9 March 1988.

25. See Ch. I, sub-section on the WID mandate, and Note 7.

26. UNFPA, Comparative Results of UNFPA Evaluations, New York, May 1986.

27. An Implementation Strategy to Strengthen the Capacity of the Fund to Deal with Issues Concerning Women, Population and Development Report of the Executive Director (DP/1987/38), 5 March 1987.

28. WHO, Women, Health and Development, Progress Report by the Director-General, EB87/22, 6 December 1990.

ANNEXES

ANNEX 1

ECLAC

Exercise

FINAL REVIEW

CHECK LIST FOR DEVELOPMENT PROJECTS
IF INTEGRATION OF WOMEN IN DEVELOPMENT IS AN OBJECTIVE

PROJECT OBJECTIVES

- What are the objectives of the project?
- Are women specifically mentioned as either agents or beneficiaries?
- What, if any, are stated benefits for women? e.g.:
  - acquisition skills
  - increased productivity
  - reduced workload
  - opportunity to earn cash income, etc.
- What assumptions are made in believing that project inputs will lead to these benefits?
- If women are not specifically mentioned as participants, would their actions be relevant to the objectives of the project? Would a component for women be a useful addition to the project?

AVAILABILITY OF BASIC INFORMATION

- What socio-economic information is already available which is relevant to the target group in general and women in particular?
- Is information on economic arrangements at household level, including role of women, adequate for purposes of project? e.g.:
  - structure and size of households, and development cycle
  - division by sex/age of labour, decision making, rights land control over saleable products, etc.
  - sources of cash incomes, including off-farm activities, of household members
  - seasonality of labour demands, etc.
- If more information is essential, what arrangements are being made to obtain it?
- If consultants are assisting with feasibility studies, have they been briefed to consider situation and contribution of women, as appropriate?

PROJECT DESIGN AND PREPARATION

- Has there been consultation with people whose lives will be affected by project, and what attention has been given to women in this?
- Are women involved at any level in the professional planning and implementation of this project?
- Are women to be given access to the new opportunities and services which the project provides? e.g.:
  - local training and overseas fellowships
  - agricultural extension
  - new allocation of land rights
  - credit arrangements
  - membership of co-operatives
  - employment during either constructural or operational phase, etc.
- If not, what is the reason?
- Are resources adequate to provide these services for women? e.g.: Are women extension staff available in sufficient numbers if approach by make staff is not culturally acceptable?
- If project is likely to have adverse effects for women (see below) what actions are planned to counter-balance this?

ANTICIPATED IMPACT

i. *How will project affect women's access to economic assets and cash incomes?*

- Will they lose any of the following?
  - access to land
  - opportunity for paid employment or other income-earning activity
  - assistance with economic activities from other members of household
  - control over sale of product, etc.
- Are any gains expected other than those in Objectives (see above)?

ii. *How will project affect women's allocation of time?*

- Will their workload increase/decrease as a result of innovation of changes? e.g.:
  - mechanization
  - new agricultural inputs and cropping patterns
  - withdrawals of labor by other household members
  - agricultural advice, nutritional or health teaching, if implemented
  - changes in distance to farms, workplaces, water supply, firewood supply, etc.
- If workload is decreased, does this involve loss of income for women?

iii. *How will project affect subsistence within the target group, and women's control over food supplies for household?*

- Will promotion of commercial agriculture affect:
  - availability of land for food grown mainly for use
  - women's access to land
  - labor inputs (male and female) on foods crops, etc.
- Will any sources of food be removed or decreased?
- will women be increasingly dependent on partner's cash income for household food and necessities? If so, will this income be sufficient to make good subsistence losses? How subject is it to fluctuations according to world market, climatic conditions, etc. Can it be assumed that male income will "trickle down" sufficiently to meet basic household needs?
- Will there be a change in staple diet? Will this be acceptable? Will it involve increased time in preparation?
- Will changes in labor allocation alter nutritional needs of any members of household? Are subsistence resources or increased cash incomes sufficient to meet them? If not, what are probable consequences for women and children, specially if unequal food distribution are customary?

iv. *Is the project likely to have any adverse consequences for women within groups and categories not immediately affected?*

EVALUATION

- Is provision being made to monitor and evaluate the impact of the project on women?
- Will available baseline data be adequate for this purpose?
- What factual indicators would be relevant?

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Ministry of Overseas Development
LONDON, ENGLAND

Source: ECLAC, *Women and Development Guidelines for Programme and Project Planning*, pp. 110-112

ANNEX 2

UNICEF

TENTATIVE GUIDELINES AND CHECKLISTS

D. **Evaluation**

Note: Past experience shows that:

(i) many evaluations concentrate overwhelmingly on measuring project outputs in relation to purposes (i.e. the number enrolled in a training programme; the number of households connected to water supplies) while ignoring larger issues of how projects affect everyday life of beneficiaries. As such, they measure participation rather than impact.

(ii) among projects that are sectorally based, data on participation or (if available) on impact are rarely disaggregated by sex. Little is known, therefore, of the consequences to women of having participated in a project.

In sectoral programming in particular, there is need to:

(i) design monitoring/evaluation systems with an institutionalized concern for the needs of girls and women by ascertaining that questions regarding their participation are raised throughout the entire project cycle, leaving sufficient room for corrective action during various phases of the implementation process.

(ii) develop a procedure for evaluating differential project impact on women and men so that the lessons learned about the sexual distribution of project benefits be systematically compiled and compared, and improved designs are facilitated in the future.

Bearing the above in mind, the following questions may be asked:

1. Has any midstream and/or project evaluation been done to date?
   If no, why?
   If yes, what was the scope of the evaluation? (Was it the entire project? or the UNICEF supported component?)
   Was the evaluation done by the Government alone? by UNICEF alone? By both combined? what was the UNICEF input?

2. What results were expected from the evaluation?
   What results were achieved?
   How was this measured?
   What was the government's reaction to the evaluation?

3. What was major focus of the evaluation report?
   Measuring project output: analyzing social impact?
   Identifying internal/external constraints? Highlighting facilitators?

4. Where project adopts a sectoral approach, did the evaluation design address gender differences in project outcome? in project impact?

5. Did evaluation probe into whether women participants incurred certain costs (social, economic) in order to be able to participate

in the project? Assuming the factor of time constraint, which of women's daily tasks did not get done or got done most effectively? Was women's daily routine complicated by additional tasks? Did women's health suffer?

6. What was the overall reaction of the Government to reportings on gender differences? On the issue of social "costs" being incurred by women as a result of project participation?

7. What are the regular follow-up action procedures regarding recommendations emerging from evaluation reports by the Government? By UNICEF?

E. **Assessing Long-Term Social Impacts of Development Projects**

1. What are the direct effects of projects on primary beneficiaries? On women participants as compared to the men? How has women's access to important resources changed in absolute terms as a result of the project? (The target population may be defined as classes of individuals such as the malnourished unemployed youth; classes of households such as the small farmers, whole localities, such as villages or districts within integrated development schemes.)

F. **Conclusions and Recommendations**

In terms of the women-related programme objectives that have been outlined earlier and the programme approaches pursued:

1. How does UNICEF staff assess the <u>design and formulation</u> of the project in terms of:
   - responding to development needs and concerns of women and girls;
   - improving the socio-economic situation of women;
   - assisting to eradicate sex disparities in the health and nutritional care of infants and children;
   - upgrading technical capacity skills of institutions dealing with women;
   - integrating a women-dimension into mainstream development thinking, planning action;
   - as a bridging strategy with the potential to link up with mainstream development.

2. How is the <u>outcome</u> of the project perceived in terms of the above categories?

3. What parts of this project have been especially successful? What were some of the internal and external that were particularly conclusive to this success? What can we learn from this? How much of it can be replicated?

4. What parts of the project have been the least successful? The weakest? How can they be avoided in the future?

5. Which phases of this project cycle were the most critical for project success? For project weakness?

6. What lessons can be drawn for the future design of projects and their implementation?

7. On the basis of this project experience is it possible to evaluate the effectiveness of different project strategies in:
   reaching and benefitting women, in general;
   reaching and benefitting low-income women, in particular.

8. What are the distributional effects of projects across different categories of persons within and outside the targetted population?[1] Of particular importance to the analysis op women's performance is the question of intra-household allocation of resources. Has the objective of the project been negatively affected by: the existing sex-based division of labor in the household;[2] intra-household distribution of food and other resources - according to sex and age of family members,[3] and/or by sex discrimination practices.[4]

Source: UNICEF CF/PD/PRO 1987 003 10 April 1987.

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[1]/ From a development perspective the distributional effects of projects across households is an equally important subject to evaluate. For example, are women-headed households by-passed by land distribution schemes? Do benefits accrue disproportionately to women from better-off households? from selected religions? ethnic groups? Does the introduction of a new technology to one class of persons result in the displacement of another group?

[2]/ To illustrate projects designed to increase food production that do not take into account the sexual division of labor in agriculture can have the unintended consequence of reducing household food consumption.

[3]/ Projects that increase total food consumption can worsen the nutritional status of certain household members because of intra-household food allocation practices that favor adult men, and male children.

[4]/ Feeding programmes for children in primary schools favor boys over girls to the extent that daughters are kept out of school more than sons.

ANNEX 3

UNDP

WOMEN IN DEVELOPMENT: PROJECT REVIEW FORM

* THIS FORM IS TO BE USED FOR ALL PROJECTS DURING IDENTIFICATION/ FORMULATION, AT TIME OF APPROVAL AND FOR ANNUAL REVIEWS AND EVALUATIONS.

* PLEASE USE A SEPARATE FORM FOR EACH PROJECT STAGE, FILLED IN AS APPLICABLE. ADD EXTRA SHEETS AS NECESSARY.

Project No. and title: _____

Proposed UNDP Budget: _____ Expected duration: _____

1. Do women typically work in the (sub) sector of this project in the geographic area where it will be located? YES _____ NO _____

   If yes, what estimated proportion of work in this (sub) sector is performed by women and men, respectively? WOMEN _____% MEN _____%

   If no, would it be against prevailing social/cultural norms of the country to involve women in this project? YES _____ NO _____

   Please explain: _____

2.1 In your view have issues of relevance to women been adequately reflected in the project:
   - objectives YES _____ NO _____
   - outputs YES _____ NO _____
   - activities YES _____ NO _____

   If yes, please explain: _____

   If no, please make recommendations to reorient the project to do so: _____

2.2 As planned, are women direct recipients YES _____ NO _____
   and/or beneficiaries YES _____ NO _____

   If yes, please describe briefly: _____

   If no, please explain why: _____

3. Please indicate the number of women and men involved in the project as:

	Project Experts	Consultants	Evaluation team members	Fellowship holders	Trainees	Others (specify)
Women	_____	_____	_____	_____	_____	_____
Men	_____	_____	_____	_____	_____	_____

Date: _____ Filled out by: _____
Place: _____ Title: _____

Project Stage:
Ident./Form._____; Appr._____; TPR_____: Eval._____; Other_____

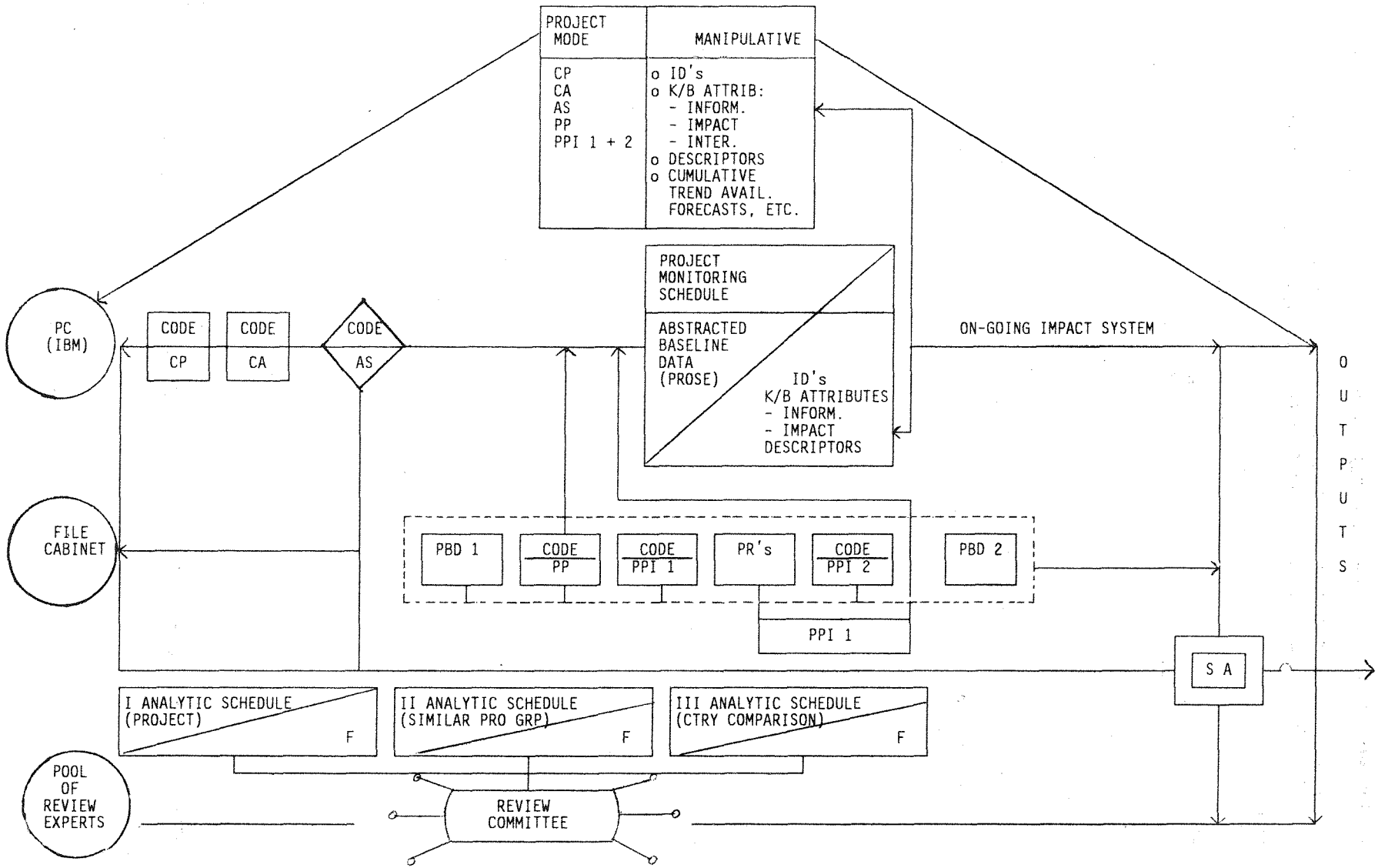
* PLEASE ATTACH COMPLETED FORM TO PRO.,DOC/ANN. REV./EVAL./OTHER.

* PLEASE SEND COPY TO: DIVISION FOR WOMEN IN DEVELOPMENT, UNDP, NEW YORK.

Source: UNDP, Women in Development: Policy and Procedures, November, 1987.

ANNEX 4

UNIFEM
K/B STORAGE AND RETRIEVAL SYSTEM
(PROTOTYPE)



KNOWLEDGE BANK STORAGE AND RETRIEVAL SYSTEM

LEGEND

SYMBOLS	USE/OUTPUT
Data Repository Sites - **A.** IBM/PC	In Code:K/BComputer component issues reports on:
Country Profile (CP) Community Analysis (CA) Projects Reference data base (KBINFO) as part of PMS Analytic Schedule (AS) Participants Profile (PP) Project Participants Info. (PPI^1) Project Participants Impact (PPI^2) Project Participants Impact Index (PPII) Project Manipulative Mode (PMM)	o Number and general characteristics of current and/or cumulative project participants. o Project Impact - by participants (sampled) and review committees of the whole. o On-going project impact (interim) o Analytic impact matrices (trends and comparative analyses by project, country, type of intervention, etc.)
Project Identification and Data Search by ID's, K/B Information, Impact and Interpretative Attributes; and Descriptors	o Internal system - All inputs to review committee - ID's and K/B attributes listed on Project Monitoring Schedule (PMS).
In Narrative	
Project Monitoring Schedule (PMS) Text of: Country Profile (CP) Community Analysis (CA) Analytic Schedule (AS) Substantive Abstract (SA)	o Project documents in printed form o Project Monitoring Schedule - As document (also on screen in K/B Unit) for review by programme Officer - For cumulative project implementation status reporting.

K/B STORAGE AND RETRIEVAL SYSTEM

LEGEND

SYMBOLS		USE/OUTPUT	
	- B. Filing Cabinet: Original documentation - Project Document (PBD 1) - Participants Profile (PP) - Project Participants Information & Project Participants Impact (PPI^{1} + ^{2}) - Progress Report(s) (PR) - Project Final Report (PBD^{2})	o	General Administrative Reference - documentation - correspondence - memoranda (All original documentation, except for pertinent memoranda, is placed in "dead file" after project is terminated and impact analysis completed)
	- C. Pool of review Experts: Annotated Lists: - Names/CV of experts - Agencies/Organizations - Areas of expertise	o o	Identification of Pool of Experts for periodic review committees (HQ and field) Computerized roster of experts on PC
PMM in Code Stored in PC	Project Manipulative Mode (PMM)s Identifiers K/B Information Attributes K/B Impact Attributes K/B Interpretative Attributes Descriptors PMS, CA, CP, AS, PP, PPI ^{1} & ^{2}, PPII codes	o	Basic Project Information For: - Record keeping, reference - Search ID's, K/B attributes and descriptor codes for impact system - Review Committee - Fund reporting needs
		o	Part of Fund's permanent record of support activities (along with substantive abstract as prose backup).

SYMBOLS		USE/OUTPUT
PMS in Prose Stored in PC	- Project Monitoring Schedule (PMS) ID's K/B Inf. & Impact Attributes Descriptors Abstracts form Project Document Progress Reports, Final Reports special section on problems/resolutions	o For Program Officers: - monitoring project implementation of objectives & phrases of workplan - identification of problem areas and resolution process - catalytic and multiplier incidents o Data base of K/B computer component.
Project Monitoring PC	- On-going Impact System: composed of: 1. File PBD = Project Baseline Data (Prop.) PP_1 = Participant Profile PPI_1 = Project Particip. Information PR_2 = Progress Report(s) PPI_2 = Project Participant Impact PBD_2 = Project Baseline Data (Final Report)	o For Program Officers: - comparative source material for review & suggesting new projects and/or areas of concern - checking "transferability" of reported strengths & problem resolution
Documentation on File	2. PC PMS	o For Fund current information for: - CC Project Status Reports - Annual Reports - Publicity - Fund raising - Policy
		o For Field Project Managers Executing Agencies, Governments other Development Agencies and NGO's - Current descriptive impact evaluations of Fund's interface between women and selected technical cooperation activities.

SYMBOLS		USE/OUTPUT
Code / Text + Code / Text =	Text and Coded Documents Text & Code into PC of: - Country Profile (CP) - Community Analysis (CA)	o For Program Officer, Fund Administ. Other users: - CP & CA locate project within a context and in relation to development plans and strategies, development sectors (e.g. economic, social, geographical, etc.); - to check project design; approach and objectives against realistic resources and/or possibilities to procure needed resources. - AS ready for project comparative impact analysis; also for future trend analysis. o For Other Fund uses: - project design development identification of multi-agency project development and/or add-ons. o For Other Development Agencies' users: - CP and CA in document form for baseline data in project development. - AS for project design, policy, etc.

SYMBOLS		USE/OUTPUT
PPI PPI PPII in PC	= Project Participant Impact Index (PPII) Text in file, Code in PC for: *PPI[1] - participant baseline data: factual and attitudinal data of participants at project's commencement. *PPI[2] - participant factual & attitudinal data at project's conclusion. *PPII - direction and degree of change - impact on participant at conclusion of Fund-supported project (or phase).	o Direct impact perception of project beneficiaries (grassroots feedback) - capture degree of expected consequences of project implementation - captures unexpected "catalytic" consequences in other than expected developmental sector. (e.g. expected increased income: unexpected-women elected office for first time.) - information "facts" on participants actual situation at project start and termination.
SA in Computer memory	= Substantive Abstract Narrative summary of completed project activities and contextual document information. - Records changes captured by "time sequence" elements, (e.g. anticipated consequences - concrete results; participants' situation before and at conclusion of project,) internal progression of "procedural" project activity, and fulfillment of objectives.	o Input document to Review Committee o Permanent record of project history (with PMS in PC memory). o Appropriate sections used by Fund for: - publicity - fund raising - Info. to other development agencies in specific areas.
RATING/ DESCRIPTOR CODES PMS PPM	= Analytic Schedule The consensual rating by Committee consisting of three "reviewers" on the directionality and degree of project impact	o Set of impact ratings for each project. o Comparative and analytical assessment by geographic area, type of project, etc.

* (Responses are reflected in "Indices" corresponding to development sectors (economic, social, policy/political, information, technological, participatory and personal.)

SYMBOLS		USE/OUTPUT
ABSTRACT TEXT IN PC: PMS	Assessments are focussed on rating or ranking in accordance to certain criteria of "Interpretative" questions. (Twelve separate cards) 1. GENERAL (direct and indirect connections to stated policies and strategies, also expected and unexpected development sector impact (economic, social, etc.) 2. SPECIFIC (directionally and degree of change within each development sector) 3. Institution-building 4. Catalytic and/or multiplier effect 5. Lessons for: a) UNIFEM b) Women in Development c) Women, development, and technical co-operation.	o Analytical impact statements and trends used by Fund for: - policy review and strategies - publicity and fund raising - monitoring review - project development. o For development agencies & governments: - Resource, especially to elaborate, clarify the interconnections between a focus women's group technical co-operation efforts.
AS HQ F	= Review Committee o Committee consists of three expert "reviewers"... a mix of technical and development agency personnel. (There are two separate committees: one in the field and one at the Headquarters for each project or group of projects to tap different perspectives and/or immediate acquaintance with the actual conditions surrounding a project).	o Set of impact ratings by project and in future by country and/or type of project. o Qualitative assessment of "lessons learned" and rating choices.

SYMBOLS	USE/OUTPUT
(In the future stages of implementation and as impact analytic data are accumulated, review committees to assess similar project groups and/or country project groups are to be instituted. o Each "reviewer" receives a packet which includes: - Substantive abstract - Community analysis - Country profile - Project manipulative mode print-out - A set of "rating" cards. o Committee "procedure" - "Reviewers" separately read and assess project material and complete rating/ranking cards. - In "Committee of the Whole" reviewers argue out a consensual agreement on project impact rating and reasons for rating. They then complete project's Analytic Schedule which is stored as a "Knowledge Bank interpretative attribute" in the PMM, as a part of cumulative project Information/impact "facts".	o Committee of the Whole consensual ratings/ranking and descriptor-coded consensual reasons for each assessment and data base for: - Trend analysis - Forecasting - Review of women/development policies and procedures - Assist in new project/programme formulations. o Analytic Schedule regular and *ad-hoc* reports available to UNIFEM and, on selected bases, for other interested agencies, governments, and non-governmental organizations.

Source Silvert, Dr. Friede, UNIFEM's Knowledge Bank, UNIFEM Occasional Paper No. 8, Appendix D.

ANNEX 5

WHO

FRAMEWORK
FOR ASSESSING WOMEN'S ASPECTS
OF HEALTH DEVELOPMENT PROGRAMMES

(Experimental Version)

The Strategies for Health for All by the Year 2000 clearly articulate the need for reorienting approaches and methods of health development programmes in order to better reflect the policies of Member States of the World Health Organization.[1] The "Health for All" series of publications This Framework is meant to contribute to that effort by suggesting ways of looking at women's aspects, as part of the managerial processes.

There is now a growing consensus on the importance of addressing women's issues for the achievement of Health for All. As a result, people are asking for ideas on what questions to pose in planning and evaluating health development programmes, and on how to take women's issues into account. This framework is a type of checklist, comprised of items and questions. it is not a rigid instrument, nor is it meant to be used in its entirety in all situations. it will have to be appropriately adapted to each specific setting. Relevant items can be extracted and included in existing evaluation tools; or the framework can be used for a separate exercise.

The overall purpose of such an assessment is to give visibility to women's issues both by using information or by collecting new information to:

- describe the interrelationship of women's status with health and development;
- assess implications of programmes on women's health;
- pin-point gaps in information;
- facilitate women's involvement in programmes;
- identify improvements in programme management.

The issue of this document does not constitute formal publication. It should not be reviewed, abstracted, quoted or translated without the agreement of the World Health Organization. Authors alone are responsible for views expressed in signed articles.

Ce document ne constitue pas une publication. Il ne doit faire l'objet d'aucun compte rendu ou résumé ni d'aucune citation ou traduction sans l'autorization de l'Organisation mondiale de la Santé. Les opinions exprimées dans les articles signés n'engagent que leurs auteurs.

This framework is intended for programme managers, or those involved in the planning and evaluation of primary health care programmes, in human resources development, in health systems research, in health information systems, and in many other areas of health development. In using the framework, many kinds of information will have to be used, including:

- programme management information
- health and social status data
- special surveys or studies
- interviews
- group discussions

Such information can be obtained from a variety of sources: Government Ministries of, for example, Health, Education, Employment or Labour, from Women's Bureaux, from universities and special institutes, from women's organizations.

AS THIS IS AN EXPERIMENTAL VERSION OF THE FRAMEWORK, WE WOULD WELCOME COMMENTS AND SUGGESTIONS FROM PEOPLE WHO HAVE USED IT. PLEASE SEND THESE TO: WORLD HEALTH ORGANIZATION, WOMEN, HEALTH AND DEVELOPMENT, 1211 GENEVA 27, SWITZERLAND.

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1. "Health for All" series (referred to on page one):
   - No. 1 Alma-Ata 1978. Primary Health Care.
   - No. 2 Formulating Strategies for Health for All by the Year 2000. Guiding principles and essential issues.
   - No. 3 Global Strategy for Health for All by the Year 2000.
   - No. 4 Development of Indicators for Monitoring Progress Towards Health for All by the Year 2000.
   - No. 5 Managerial Process for National Health Development. Guiding Principles for use in support of strategies for health for all by the year 2000.
   - No. 6 Health Programme Evaluation. Guiding principles for its application in the managerial process for national health development.
   - No. 7 Plan of Action for Implementing the Global Strategy for Health for All by the Year 2000 and Index to the "Health for All" Series, No.1-7.
   - No. 8 Seventh General Programme of Work Covering the Period 1984-1989.

I. BACKGROUND FACTORS

Indicators of women's status relate to social conditions and factors that affect health directly or indirectly, or affect the use of health services.[1] There is a need to identify risk factors related to women's role and status, to be able to ensure that assumptions underlying programme designs are realistic. Questions can be posed about women's social and economic roles, children's health and the health of the family as a whole.

1. *How do women's work patterns affect health?*

In most societies women and men traditionally work in different types of occupations, in various economic sectors - formal and informal. This implies different work risks, working conditions, and time-use or workloads. These also imply sex-differences in disease transmission, risks or susceptibility to illness.

Questions will have to be posed about the availability and adequacy of information on these different topics; for instance does the information exist and if so has it been related to health problems? What relationships have been discovered?

1.1 Work risks: the type of activities (income producing, farming, domestic child care, etc.) women are engaged in throughout the day and in different seasons, e.g.:

- specific health risks associated with each of these activities;
- the conditions of the workplace;
- existence of protective legislation; provisions.

1.2 Women's time use:

- number of hours worked per day;
- time available for child care, e.g. breastfeeding (full or partial); weaning (preparation of food and feeding); taking children to health services;
- time used for domestic work, e.g. food production, water carrying, cleaning;
- effects of excessive workload during pregnancy and lactation on women's health and nutrition;
- relationship of nutritional anaemia and workload.

2. *How does women's status affect health?*

Although related to other factors of poverty and life-style, many gender-specific factors affect the health of all family members, especially children. Thus the following factors can be associated with health status, health care behaviour and utilization of health services. As in 1 above, questions can be posed about the availability or adequacy of information on these points (i.e. does it exist? Has data on women's status been analyzed in relation to health? If so, what are the results?).

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[1]/ Development of Indicators for Monitoring Progress Towards Health for All by the Year 2000, p. 11, para 4; p. 18, para 30.

a) women's education: e.g. number of years schooling, male/female literacy ratio.

b) women's income: e.g. income distribution in family; proportion of women-headed households.

c) household decision-making: e.g. family planning, household budget-use (use of family income) for shelter, clothing, food, medicines, seeking health care.

d) male-preference/son-preference: e.g. preferential treatment of boys through feeding and dietary patterns, health care in the family, purchase of medicines, resources (time and money) for seeking "professional" health care.

e) social taboos and values: e.g. lack of social freedom for women to leave home or village, prohibition against women having contact with male health workers; women's perception of their own "normal" health condition.

f) other social indicators: e.g. minimum legal age at marriage, proportion of teenage women married.

Information about these factors may be available from special surveys undertaken by the women's bureaux, public health or nutrition institutes, universities, etc. Sex-differentials in childhood mortality and morbidity and ratio male/female use of health services would be used for d) and e). Male-migration figures may be useful for b).

These items would have to be compared with health indicators, such as:

- maternal mortality rate
- fertility rate; contraceptive prevalence rate
- ages of first pregnancies
- proportion of infants with low birth weight (this would give some indication of women's nutritional status prior to childbirth)
- anaemia in women; weight gain during pregnancy
- access to trained personnel for attending pregnancy and childbirth
- neonatal mortality (as an indication of the influence of women's health on infant mortality)
- infant mortality by sex; and postnatal mortality by sex (to reflect the importance of environmental and behavioural factors on health)
- immunization coverage by sex
- wight-for-age by sex
- life expectancy by sex

II. HEALTH PROGRAMME: PLANNING, IMPLEMENTATION, AND MONITORING

The managerial process for health development programmes[2] is more than a methodology: it is a systematic, continuous process of national planning and programming. At all stages of the managerial process, women's aspects exist and have to be taken into consideration. In the areas listed below, specific questions can be directed to women's issues as applied to specific health projects to broader health programmes or to the overall managerial process in the health field, with adjustment of questions to fit the purpose.

1. *Needs assessment and priority setting*

1.1 Do indicators used include sex-specific social or economic factors? Is base-line data differentiated by sex (e.g. sex differentials in childhood mortality and morbidity)? Are women-specific indicators included (e.g. maternal mortality and female morbidity)?

1.2 Are women involved in determining priorities and setting objectives? Do men and women identify needs and priorities differently?

1.3 Are women specifically mentioned in objectives? Are targets differentiated by sex?

2. *Have effect of the programme on women been anticipated?*

2.1 How will the programme affect women's health, nutrition, and fertility status (e.g. according to the programme's outcome indicators)?

2.2 Will it have any effect on women's access to or control of resources (e.g. employment opportunities or income-generating activities, family food supply, family income)? How will the programme affect women's income? Do changes cost women more or less money than before?

2.3 How will the programme affect women's use of time (e.g. will the introduction of new health caring roles, use of new technology, or health education result in an increased or decreased hours worked)?

3. *Are programme resources equitably distributed?*

Is there a way of identifying use of funds for women? If yes, are funds distributed equitably between women and men?

4. *Are health services accessible and acceptable to women?*

4.1 Are women's work patterns or time-use taken into account in deciding on when and where services are provided? For example, compare health service schedules with the time when women's work in fields, do domestic chores; measure distances women must travel to service points.

4.2 Are special considerations made for women in cultures where privacy and discretion are required? For example, are provisions made for women who cannot visit health centres? Are female health workers available for women? Are latrines designed and located conveniently and discreetly?

4.3 Are sex differences taken into account in devising approaches for education and services? For example, in strategies for control and prevention of sexually transmitted diseases or in family planning promotion? Do

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[2]/ Managerial Process for National Health Development, WHO, Geneva, 1981, p. 9.

restrictions exist on women's access to public media (e.g. prohibitions against women viewing public television)?

4.4 Are health education activities geared to "mothers" only or are fathers included?

4.5 Do health education materials promote sex equality? e.g. are women shown as doctors in posters? Are both girls and boys shown in promotional materials for immunization? ARe fathers shown performing child care tasks?

4.6 Are personnel trained to be sensitive to women's special needs and problems? If so, how? What is the content of message? Are special materials used?

4.7 Are women satisfied with services? Note results of any user-satisfaction studies or surveys of utilization of health services, carried out in the country.

5. *Is provision made for monitoring or evaluating women's components of programmes?*

Does the programme have a management information system which will allow assessment of effects on women? Is it adequate for the purpose? What indicators are used?

6. *Do criteria for selection of technologies include the impact on women?*

Do criteria relate to women-specific social and cultural practices? Has technology-use been assessed according to suitability for women's biology, time-use, etc. (e.g. size and design of water pumps, design and placement of latrines, strategy for weaning-food preparation, type of contraceptive, design of household hardware (stoves, food storage, cleaning utensils)?

7. *What is the proportion of women staff in the programme?*

- What is the proportion of women in managerial positions? In supervisory positions? At other service levels?

8. *Do programme training activities give equal opportunity to women?*

Cite:
- proportion of women in training activities
- special efforts taken to involve more women, if proportion not satisfactory
- proportion of fellowships awarded to women

9. *Do task analyses and planning for task distribution take women's traditional health care roles into account*

Are tasks of health workers compared with health care roles of women in the family and community?

10. *Have women's organizations been involved in the project/programme?*

If so, how have they been involved in:

- planning, problem definition and needs identification?
- implementation?
- monitoring or evaluation?

III. WOMEN'S PARTICIPATION IN THE HEALTH SYSTEM

Questions can also be posed about women's participation in relation to health system policies and human resources development approaches which affect health development programmes as a whole, as opposed to specific programmes, referred to above.

1. *What is the extent and nature of women's participation in the health care system?*

An assessment of the participation of women in health development programmes is relevant in terms of a) ensuring non-discrimination and effective human resources strategies (manpower development in general); b) incorporating women's issues or representing women's concerns in health programming planning and evaluation; c) promoting and supporting community involvement approaches; d) linking with traditional (informal) health care systems or networks; and e) ensuring maximum and equitable social control.

Questions could be grouped as follows:

1.1 Are women represented in policy-making and decision-making? Cite data on:

- ratio of women in managerial or executive positions, e.g. in the MOH, in the Direction of Health Services, in National Research Training Institutes, etc.;
- proportion of women involved in decisions on: determining priorities in overall national health strategies; allocation of resources; selecting priority research areas;
- types of opportunities for increasing women's participation in programme management positions (e.g. proportion of women in health management courses, proportion of women receiving fellowships).

1.2 Do health personnel policies and practices discriminate against women? For example, proportion of men to women in each category of health workers (e.g. medicine, nursing, pharmacy); wage or pay differentials; employment regulations (e.g. maternity protection and legislation, maternity dismissals, facilities for day care of children or breastfeeding, breastfeeding breaks).

1.3 Are there sufficient numbers of women available for health services dealing with female-specific health needs and problems?

1.4 Do training schemes for health workers give equal opportunities to women? For example, note proportion of men and women in training activities; efforts made to redress imbalances.

2. *Have women's organizations or associations been involved in planning, implementation and evaluation of health programmes?*

The involvement of women's organizations is an integral part of community involvement. They are important community resources for health because many of such groups a) have traditional interests in health; b) provide supportive, women-to-women networks; c) could represent women's concerns; d) carry out activities within integrated approaches (i.e. as opposed to subject-related or vertical concerns); e) can link other sectoral activities with health; and f) provide a forum for health educational and promotional activities geared to women.

2.1 Have women's organizations been identified for health programme involvement? Which types of organizations (local, national, voluntary, political, etc.)?

2.2 What kinds of support have been provided (e.g. funds, information, materials)?

2.3 Have they been involved in defining health problems and strategies?

2.4 what channels of communication exist between the national health agencies (or Ministry of Health) and women's organization? Is there a liaison office or are special persons assigned to handle this?

Source: WHO Women Health and Development (WHD/85.1).

ANNEX 6
IFAD/ACC/Task Force - Women in Development

Women in Development (WID)

Past experience has shown that rural and agricultural development initiatives do not equally affect the lives of men and women. For example, the introduction of cash crops or irrigation and rice cultivation in several sub-Saharan African countries has increased men's income. But it has adversely affected women by increasing the demand for their labour on cash crops and diminishing their ability to grow vegetables or engage in marketing and earn an independent income. This, in turn, has had unfavourable consequences for food availability for the family and the nutritional status of children.

The reasons for differing impacts are not difficult to see. In addition to the constraints of all-encompassing poverty and deprivation, women in rural areas suffer from institutionalized discrimination reinforced by custom and prejudice. They are not treated on a par with men. Moreover, they have to perform their roles in the family as mothers and wives, for which they are not financially compensated. As a result, their economic contribution tends to be underestimated and is often ignored by development planners and project designers. There is little doubt that most of the development programmes in the past have focussed on the economic activity of men and not of women.

The family should not be viewed as a monolithic institution which tries to maximize benefits equally for all its members. Instead, it should be seen more as an organizational unit with different obligations, rewards opportunities and options based on age, gender, and production roles. The implication is that we should not assume that increased incomes, benefits, or losses are equally distributed in the family.

The impact on women of a rural or agricultural project can be examined with reference to variables such as income, access to land and productive resources, employment participation in organization, and women's traditional roles in the family and their status in society. Case studies should explore not only economic dimensions, but also the social and cultural dimensions of the impact.

However, women, like men, should not be treated as an undifferentiated social group for the purpose of impact analysis. Their conditions, problems and roles vary according to their socio-economic status. The economic disabilities faced by a landless woman agricultural worker, for example, are not the same as those encountered by the wife of a prosperous commercial farmer.

A checklist of items relevant to the status and conditions of women is given below:

1. general items

   a) percentage of funds earmarked for women
   b) percentage of funds spent on women
   c) implementation of the women's component of the project relative to the rest of the project relative to the rest of the project, and
   d) number and percentage of female heads of household in the project area.

2. Project inputs and outputs

   a) percentage of women among the beneficiaries receiving direct project benefits
   b) percentage of women receiving credit among the total beneficiaries

c) percentage of women among the receivers of agricultural inputs (fertilizers, insecticides, seeds, and equipment)
d) percentage of women among the farmers covered by extension services, and
e) percentage of women among the people trained by the project.

3. Impact (to assess change)

a) income, expenditures, and savings:

i) income differentials between men and women;
ii) income levels of the target population by sex; and
iii) expenditure and savings differentials between men and women.

b) Health and nutrition:

i) food consumption differentials between men and women and changes in them, and
ii) access to health facilities for men and women.

c) Access to land and production resources:

i) proportion of land held by women;
ii) legal and traditional practices with regard to the ownership, inheritance and use of land, houses and other property, and production assets by women; and
iii) decision-making within households with respect to production and its disposal, including marketing.

d) Employment and labour time allocation:

i) total employment in major agricultural tasks in project areas - division by socio-economic status and gender;
ii) economic activity of women, including unpaid work in the family holdings, e.g. child care, cooking, and cleaning.
iii) secondary occupations of rural women (e.g. cottage industries).

e) participation in beneficiary organizations and decision-making:

i) number and nature of beneficiary institutions for men, women, and joint;
ii) leadership, decision-making practices, and effectiveness of the institutions with respect to men and women;
iii) percentage of female members of participatory institutions, e.g. agricultural cooperatives, farmer's associations, women's associations; and
iv) participation of women in project-related meetings, e.g. with project and other government officials.

Source: ACC Task Force, Panel on Monitoring and Evaluation, Monitoring and Evaluation, Guiding Principles, IFAD Publications, 1985.

ANNEX 7

SUGGESTED TOPICS FOR CONSIDERATION BY THE WORKING GROUPS OF THE CONSULTATIVE MEETING ON EVALUATION METHODOLOGIES (8-10 November 1989, New York)

A. **Programme/project (p/p) development and design**

1. Does the organization have a long-term strategy or policy on women in development (WID)?

2. How does the p/p fit into the long-term strategy?

3. Is a WID profile of the recipient country available?

4. If yes, what aspects of the country profile will the p/p affect or contribute to?

5. If no, what efforts have been made to establish the pre-p/p WID situation?

6. Are women identified as participants/recipients/beneficiaries in the p/p design? Numbers - percentages - groups

7. Are funds earmarked for women? Percentages?

8. Are desired/potential effects on women identified in the p/p document?

9. Are specific instructions given in the p/p document for gender differentiation in:

   - Situation within the sector/subsector/activity the p/p relates to:
   - Access to p/p inputs
   - Expected participations
   - Expected participation in p/p activities and the benefits from p/p outputs
   - Monitoring and reporting the implementation process

10. Does the p/p document establish the complementarity (mutual reinforcement) with WID elements in the p/p of other sectors?

11. Are appropriate WID criteria and indicators specified in the p/p document?

12. How can the development of such criteria and indicators be incorporated in the p/p design?

B. **Monitoring and evaluation**

1. Is awareness-building built into the monitoring and evaluation process, e.g., are desk officers and field personnel trained on WID and in WID monitoring and evaluation?

2. Are the monitoring and evaluation guidelines/manuals specific on WID?

3. Are evaluators briefed on WID issues and procedures in evaluation?

4. Are the terms of reference for evaluators specific on WID issues?

5. Is community involvement built into the monitoring and evaluation process?

6. Are there ways and means provided for community involvement in monitoring and evaluation?

7. Are there any factors beyond the control of the evaluators which could impose limitations on the consideration of the WID dimension?

C. **Feedback**

1. Does the reporting system include built-in feedback from the grass-roots to the policy level?

2. to what extent is the experience with pilot and catalytic women-specific projects affecting/being incorporated into the mainstream p/p?

D. **Other relevant aspect related to the p/p cycle**

1. Improvement of conceptual framework for monitoring and evaluation, including community-based approach

2. Evaluation teams - internal, external

3. Improvements in the ways and means of conducting monitoring and evaluation

4. Types of desired indicators

5. Post p/p monitoring

6. The need for p/p research

ANNEX 8

CONSULTATIVE MEETING ON EVALUATION METHODOLOGIES
(8-10 November 1989, New York)

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