Integrating a Gender Dimension into Monitoring & Evaluation of Rural Development Projects



he World Bank aims to reduce gender disparities by enhancing women's participation in economic development. It assists member countries to "design gender-sensitive policies and programs to ensure that overall developmental efforts are directed to attain impacts that are equitably beneficial for both men and women" (Operational Policy 4.20).

The Bank's rural development strategy (Rural Development: From Vision to Action, 1997) recognizes the importance of integrating gender into all aspects of rural development as a crosscutting issue. This requires developing an appropriate framework for assessing progress in achieving broad-based and inclusive rural development.

The Toolkit for Integrating Gender into Monitoring and Evaluation

has been developed to assist project task teams, borrowers, and partners to recognize and address gender concerns in designing rural development sector projects, to monitor progress in gender integra-

tion during implementation, and to evaluate its impact in achieving overall rural well-being.



- Women represent the majority of the rural poor (up to 70%), especially where migration, marital instability, male mortality and single parenthood have left them as heads of household
- Although many times it goes unrecognized, women play a major role in the survival strategies and economy of poor rural households across all geographical regions
- Women have proved to be a driving force in achieving project effectiveness and reducing poverty



- Research findings suggest that improving women's access to resources, control over income, and education, while reducing their time burden, will generate both efficiency and welfare gains
 - Increasing the economic productivity of

the rural poor is largely about enabling women to realize their socioeconomic potential more fully and improve their own and their families' quality of life.

Why integrate a gender dimension into monitoring and evaluation?

- Gender-sensitive monitoring & evaluation reveals the extent to which a project has addressed the different needs of men and women, and has made an impact on their lives and overall social and economic well-being
- It also improves project performance during implementation, allows for midterm corrections, and makes it possible to derive lessons for future projects.

Monitoring is defined as "the continuous assessment of project implementation in relation to agreed schedules and of the use of inputs, infrastructure, and services by project beneficiaries". (see endnote 2, page 7)

Evaluation is defined as "periodic assessment of the relevance, performance, efficiency, and impact (both expected and unexpected) of the project in relation to stated objectives." (OD 10.70: paragraph 2 and 3). (see endnote 3, page 7)

How to Integrate Gender into Monitoring and Evaluation

An effective gender-sensitive monitoring and evaluation system in rural development projects requires that the following key activities be undertaken at different points of the project cycle:

STAGE I - IDENTIFICATION & PREPARATION

- Ensure that the benchmark survey or baseline study are gender-sensitive⁴
- Undertake an initial gender study or analysis⁵ to identify the potential negative impacts of project intervention on women as well as men
- Identify gender-related goals and priorities based on available information and consultation with stakeholders
- Conduct a gender-sensitive social assessment⁶ to broadly cover social, cultural and economic aspects, if possible
- Assess the institutional capacity for integrating gender into development activities.

STAGE II - DESIGN & APPRAISAL

- Ensure gender is integrated into goals and objectives and set clear targets⁷
- Plan for developing capacity to address gender issues and to monitor and evaluate progress
- Set up a monitoring and evaluation system
 - Adopt and "engender" the Logical Framework⁸ as in the Project Summary of the PAD (Annex 1)
 - Identify and select key gender-sensitive indicators for input, output, outcome and impact⁹

- Develop/select the "best" data collection methods and decide on timing (Annex 2)
- Organize reporting and feedback processes, clearly identifying who will collect and analyze information and when, and who will receive it.



STAGE III - IMPLEMENTATION

 Carry out capacity development exercises for integrating, and for monitoring and evaluating, gender-related issues.

During Supervision:

- Collect gender-sensitive data based on the selected indicators
- Monitor the progress against targets set for the period under evaluation, and feed back results into the system to allow for midterm corrections.

During Mid-term Evaluation:

Assess progress and make corrections if needed to obtain expected gender-related outcomes.

STAGE IV - IMPLEMENTATION COMPLETION

- Assess impact of gender integration in the overall project context
- Assess impact of project interventions on men and women
- Derive and share lessons that can feed into the overall Rural Development goals and objectives (Annex 3).

THROUGHOUT THE PROJECT CYCLE,
PROMOTE PARTICIPATION AND CONSULTATION
AMONG STAKEHOLDERS



Monitoring of progress in gender integration **Gender M&E** Evaluation of impact Closing gender gaps: changes over pre-project situation Gender equity in allocation into implementation plan overall social wellbeing Benefits of outputs for Information on social of project resources Integration of gender and gender issues men and women **Empowerment**, **Implementation of Activities** Development Objectives **Resources and Inputs** Project Identification **Project Outputs** Project Goals Project G ш 4 ш α

Figure 1: Levels of Gender Integration into the Project

Key Issues To Consider

Identification & Preparation

- Does the client (country, state, district) have the policy and institutional framework to promote gender equality in development activities?
- Are the project's goals and objectives gender-sensitive: do they adequately reflect women's and men's needs?
- What is the level of input from men and women stakeholders, local women's NGOs, community-based organizations, etc., in setting goals and objectives?
- Is baseline information, against which results can be measured, being collected through gender analysis and/or social assessment?

Participatory rural appraisal (PRA) comprises a growing family of participatory approaches and methods that emphasize local knowledge and enable local people to make their own appraisal, analysis, and plans. The purpose of PRA is to enable development practitioners, government officials, and local people to work together to plan context-appropriate programs. PRA uses group animation and exercises to facilitate information sharing, analysis, and action among stakeholders. Originally developed for use in rural areas, PRA has been employed successfully in a variety of settings.

Design & Appraisal

- Do the activities planned reflect the project's gendersensitive goals and objectives?
- Is there a credible implementation plan that links courses of action and intermediate targets to expected final outcomes which benefit both men and women?
- Are targets being set in consultation with stakeholders?
- Are gender-sensitive M&E indicators being identified in consultation with stakeholders? Have the beneficiaries identified performance indicators they would like to monitor?

Capacity:

- Do the planning and implementing agencies have the capacity to identify and address gender issues? Has staff received gender-sensitive training? If not, will they?
- Is there an incentive structure (including rewards and sanctions) to encourage staff to address gender concerns?
- Have guidelines for gender related activities been developed and implemented?
- Are funds being allocated for gender capacity building?
- Is there a gender focal point or staff in charge of gender concerns within the PMU and PIUs, and the concerned Ministry of the borrowing country?

Data Collection Methods:

- Do the tools and methods to collect data reflect gender outcomes and impacts?
- Are there male and female data collectors, and have they received gender sensitivity training?
- Are standard data collection and analysis methods being complemented with qualitative methods such are PRA, focus groups, etc? Is gender analysis being integrated into these?
- Is the possibility of conducting a stand-alone gender study being considered?
- Does the project design take into account the different M&E information needs in terms of how the information will be used and by whom, and are these needs being assessed in light of budgetary and time constraints?

Partnerships:

 Is the possibility of developing partnerships with local women's NGOs, grassroots organizations, research centers, etc., for data collection and analysis being explored?

throughout the Project Cycle

Implementation

- Are gender-sensitive and sexdisaggregated data being collected to keep track of inputs and outputs, and to measure outcomes? From what sources?
- Is the same information as the baseline data being collected for the indicators at one or several times during the life of the project in order to measure and evaluate impact?
- Is there thematic unity in all data collection formats and reports?
- Are the data fed back to project personnel and beneficiaries on a timely basis to allow for project adjustments?
- Are local women's organizations, NGOs, research institutes, etc., involved in monitoring the progress of the project's gender integration?
- Are the results/findings being disseminated and consulted? How? When?
- Are there specific and adequately detailed references to gender in progress/supervision reports?

Implementation Completion – Evaluation

- Did both men and women participate in the project? Did both men and women receive the benefits?
- What were the preliminary indications about emerging outputs? How did they affect men and women?
- Did the project produce the intended benefits for men and women? How do the results compare to the targets? What factors account for variations in impact?
- How did the risk indicators/ critical assumptions about gender interact with the project's inputs in support or hindrance of project progress?
- How can gender impacts be increased or stabilized?
- How did project beneficiaries, male and female, respond to the interventions?
- What are the realistic prospects of sustaining the benefits stream in the long term?



Participation

Promoting participation in gender-sensitive M&E can build consensus among stakeholders on the project's gender goals, and on what gender outcomes to monitor and what impacts to evaluate.

Participatory M&E makes it possible to identify problems early in the project implementation stage, and give communities and implementing agencies the ability and flexibility to respond to changing scenarios that may affect the project interventions.

It taps the perspectives and insights of all stakeholders, beneficiaries as well as project implementers. All stakeholders identify issues, conduct research, analyze findings, make recommendations, and take responsibility for necessary action. Stakeholders who are involved in the identification of problems and solutions will develop the all-important ownership and commitment to any corrective actions adopted.

The first steps for integrating gender into the participation process include:

- 1. Identifying the key stakeholders and ensuring they will all be invited to participate during consultations
- 2. Assessing the current scope, level and quality of participation. (To what extent are organizations representing both women and men involved, and what are the factors limiting their fuller participation?)
- 3. Identifying and setting measures to strengthen the capacity of weak and vulnerable groups, including women, to participate
- 4. Assessing the existing capacity of government and other agencies to organize participatory processes. Where necessary, rapid capacity building through training, study tours or technical assistance may be required to ensure that the capacity exists to manage the participatory processes.

Participatory Monitoring and Evaluation (PME)

provides task team leaders (TTLs) with quick feedback on project effectiveness during implementation. TTLs can use this tool to systematically evaluate progress and impact early in the project cycle.



Checklists

Are participatory processes among stakeholders, men and women, being encouraged when:

- Setting goals?
- Selecting the best data collection methods?
- Setting targets?
- Collecting and analyzing data?
- Identifying activities and indicators?
- Monitoring and evaluating?
- Planning, implementing and maintaining projects?
- Reporting and disseminating results?

Indicators

- How many women and men, people from different ethnic groups, members of different castes, and different economic classes are participating among the stakeholders?
- What is the level of input of women and men at different levels (government, NGOs, local stakeholders) at different stages of the project?
- What is the level of participation of local stakeholders, women and men, in key activities? (e.g., number of men and women attending project workshops, number of men and women participating in training events, number of male and female farmers participating in crop assessment trials.)

Endnotes (to pages 1 and 2)

- ¹ Rural development is a strategy to alleviate poverty through sustained increases in the productivity and income of the rural poor. Rural development projects strive to promote overall productivity and improve cost-effectiveness by: (i) directly benefiting large numbers of rural poor, (ii) having a sufficiently low cost per beneficiary so that they may be extended or replicated over broader areas, and (iii) capturing the production potential of rural women and men-farmers, livestock managers, entrepreneurs, etc.
- ² **Successful monitoring:** (i) provides feedback during the process of implementation; (ii) requires collection of readily available information and minimal processing and analysis of it; (iii) focuses on the current status of indicators; (iv) places appropriate emphasis on project outputs and impacts as well as inputs.
- ³ **An evaluation system** involves the development of a series of data over a time span starting before the project is implemented and continuing well beyond the implementation period. Unlike monitoring, an evaluation requires a longer time span before even tentative conclusions can be drawn.
- **Objectives of evaluation:** (i) Determines whether the project objectives set in terms of expected outputs, outcomes and impact are being, or will be, met; (ii) establishes causality and focuses on the links between inputs and outputs and between outputs and impacts; (iii) improves the project by sharing the evaluation results while there is still time to make adjustments to the project; (iv) contributes the lessons from evaluation to future rural development projects; (iv) identifies clearly the external factors that influence project outcomes as well as the true contribution of the project to the development objective.
- ⁴ A baseline study reveals the situation in the project area before the intervention. The resulting benchmark data is used for comparison when using indicators through the project cycle. Baseline data, against which progress and results can be measured, should be disaggregated by sex, socioeconomic and ethnic grouping, and age.
- *Gender analysis* refers to a systematic way of determining men and women's often differing development needs and preferences and the different impacts of development on women and men. It examines men's and women's access and control over resources, including the sexual division of labor, and their control over the inputs and outputs (benefits) of their labor. Gender analysis takes into account how class, race, ethnicity or other factors interact with gender to produce discriminatory results.
- 6 Social assessment (SA) is an operational framework to enhance inclusion, increase social capital, build ownership and eliminate adverse social impacts. SA consists of four main elements: (i) identification of key social development and participation issues, which includes an assessment and definition of social impacts; (ii) evaluation of institutional and social organiza-

- tional issues; (iii) definition of a participation framework; and (iv) establishment of mechanisms for monitoring and evaluation. Where adverse impacts are identified, a social assessment also will determine how to avoid, minimize, or substantially mitigate them, and develop the capacity to enable participation, resolve conflict, permit service delivery, and carry out mitigation measures in ways that are socially sound.
- ⁷ The **target** should be a clear value against which actual project results can be measured. Targets should be realistic and quantifiable statements of expected outcomes. They represent what the project wants to achieve in concrete terms.
- ⁸ "Engendering" the Logframe requires that the process of planning a project as well as each component of the Logframe matrix be done through a "gender lens". Preparation of an "engendered" Logframe involves project planners, stakeholders, and beneficiaries in analyzing gender relations and addressing questions at each level of the framework. This analysis takes place throughout the course of monitoring and evaluation, keeping in mind that the Logframe is both adjustable and applicable to long-term project management.

The Logical Framework (Logframe) is the model for the Project Summary Design (Annex 1) of the Project Appraisal Document (PAD).

- **'Cender-sensitive indicators,** as they measure genderrelated changes in society over time, point out how far and in what ways development programs and projects have met their gender objectives. Their usefulness lies in their ability to point to changes in the status and roles of women and men over time, and therefore to measure whether gender equity is being achieved. Indicators can be grouped as:
- Input indicators monitor project-specific resources to be provided for each project item; usually used at or close to the start of the project.
- Output indicators measure output for each project or component, such as improvements in relation to baseline test data; they determine whether project goals are being achieved; and are used near to the end of the lender's/Bank's involvement
- Outcome indicators measure the immediate impacts produced by each of the outputs.
- Impact indicators measure the medium and long term impacts of the project. They are usually used after the Bank's involvement is complete.
- Risk/enabling indicators measure the influence of external factors on the project.

Gender Integration in a Typical Rural Development Project: Project Design Summary (ANNEX 1 of PAD)

Narrative Summary	Performance Indicators (gender-sensitive)	Monitoring and Evaluation: Data Sources	Assumptions
I. Sector-related CAS Goal: Revitalization of rural economy and poverty reduction through increased agricultural production and productivity	Increase in productivity of crops grown by male and female farmers Increase in income of men and women farmers Increase in per capita food availability in MHHs and FHHs Reduction in the percentage of population below poverty line	Rural household survey National statistical data Impact Evaluation	Growth in agricultural production will contribute to poverty reduction and food security in male-and female-headed households
II. Project Development Objective: Increase in agricultural production through improved packages and better management Intensification of agricultural production systems through adoption of sustainable practices Income improvement in rural areas and employment generation	Percentage increase in average crop yield in men and women farmers' fields over baseline in targeted areas Increase in income of men and women farmers Increase in the number of men and women farmers receiving training in improved agricultural practices Reduction in the gap between the food demand and the domestic food production in MHHs and FHHs Improvement in access to productive resources by men and women farmers	Baseline data Household survey data Gender study report in the project area Mid-term and project completion evaluation Ministry of Agriculture's Registry	Macro-economic framework remains favorable Gender concerns given attention in planning and implementing activities
III. Outputs Policy reforms to support agricultural growth Institutional capacity development to identify and address gender based needs in farming and help improve agricultural productivity	 Policy reviews undertaken and policy recommendations adopted to strengthen institutional capacity Increase in agricultural production and improvement in crop productivity in men and women farmers' fields Number of research and extension staff receiving gender training and level of satisfaction, increase in number of female extension agents Improvement in number and quality of extension facilities and incentives to reach women farmers; improvement in women's time use Number of research and extension programs addressing gender issues, number of technical recommendations made/tried in field Share of private sector and NGOs in training and technology transfer 	Issuance of government decree, and allocation of funds Crop survey —Progress and disbursement reports Supervision reports Midterm review Gender study Time-use studies	Government's commitment and support to increase agricultural production and reduce gender differences in access to resources Commitment of all stakeholders in removing gender differences to enhance crop productivity in
Capacity development of men and women farmers to improve their productive potential in farming activities	 Number of MHHs and FHHs receiving extension advice Number of extension messages addressing gender issues Number of men and women farmers trained in improved agricultural practices and level of satisfaction; number of farmers adopting practices by sex Number of farmers' groups revitalized; increase in women's participation in group activities Improvement in quality of participation of women in farming Number of farmers receiving credit by sex 	 Progress and supervision reports Financial(credit) institutions records Field interviews Case studies 	men and women farmers' fields

Narrative Summary	Performance Indicators (gender-sensitive)	Monitoring and Evaluation: Data Sources	Assumptions
IV. Project Components/ Sub-Components Policy level: Agricultural policy review and reforms	Policy recommendations initiated Amount of budget allocated for strengthening institutional capacity Amount of funds disbursed	 Project implementation plan Supervision reports Financial monitoring reports Disbursement reports 	Extension policy will emphasize equal participa- tion of men and women farmers
Institutional strengthening: Human resource development Gender balance among extension staff Training of extension staff Research agenda to include technology development for	 Number of men and women extension agents in the districts Number of female extension agents recruited Infrastructure improvement for extension agents Number of gender training programs planned/funded for male and female extension agents Amount of funds allocated for research on gender sensitive issues in agriculture 	 Midterm review/evaluation Financial monitoring reports Disbursement reports Gender study 	in extension activities to improve agricultural production • Social and cultural norms will encourage women's effective participation
 Private sector and NGO involvement in research and extension in target areas 	 Partnership with private sector and NGOs in gender capacity development established 	Field interviewsCase studies	
Farmers' capacity development Improvement in the access of women farmers to productive resources Training of men and women farmers in improved agricultural practices	 Proper gender balance in the beneficiary profile; improved access of women to project incentives Number of training courses planned/organized for male and female farmers Number of farmers' field demonstrations, FFSs planned for women Number of men and women participating in farmers' group activities 	 Progress and supervision reports Field interviews Case studies 	

Key Questions to Ask when "Engendering" the Project Design Summary

	Narrative Summary	Performance Indicators	Means of Verification	Important Assumptions
CAS Goal	Do gender relations influence in any way the goal at the policy/national level?	What measures can verify achievement of the gender-sensitive goal?		What important external factors are necessary for sustaining the gender-sensitive goal?
Project Objectives	Does the project have gender- responsive objective(s)?	What measures can verify achievement of the gender responsive objective(s)?	goal, objectives, outputs	What important external factors are necessary for sustaining the gender responsive objective(s)?
Components/ Outputs	Is the distribution of benefits taking into account gender roles and relations?	What measures can verify that project benefits accrue to women as well as men, and to different groups of women?	analyzed in terms of gender? What gender analysis tools will be appropriate?	What important external factors are necessary for achieving project benefits (especially benefits for women)?
Sub-components/ Activities	Are gender issues clarified in the implementation of the project?	Inputs: What resources do project beneficiaries contribute to the project? Is the contribution of women as well as men accounted for? Are there external resources that account for women's access and control over resources?		What important external factors are necessary for achieving the activities and especially ensuring continued involvement of men and women participants in the project?

Source: Helen Hambly-Odame. 2000. "Engendering the Logframe." ISNAR.

Suggested Data Collection and Analysis Methods for Rural Development Projects

Method	Application	Ease and cost of data collection and analysis
Quantitative methods		
Household surveys	Household information on size, labor force participation, income and expenditure levels, ownership of assets.	Sex-disaggregated questions can be included at no cost. However, applying sub-modules to individual household members increases interview time, and often requires a second visit.
Perception and attitude surveys	Analysis of attitudes towards different organizations or prioritization of needs and projects.	May be included on household survey but requires some additional time to administer.
Seasonal labor profiles	Display of quantitative changes in farming cycle and labor allocation when new crops or techniques are introduced. Estimate person/days or months for each task during average farming season by sex.	It requires 1-2 days.
Time-use studies	Estimating the time women and men spend collecting water and fuel, traveling to work, unpaid and paid productive activities.	Questions can be included in surveys, but where possible this should be combined with focus groups or direct observation. Household diaries can also be used.
Qualitative methods		
Stakeholder analysis	Identifies the key stakeholders affected by or affecting planned or actual projects and determines their interests, influence and importance. Assists in developing ways to involve them in the consultation and participation process during project selection, preparation, implementation and monitoring.	This requires individual interviews but often with a relatively small number of respondents.
Institutional analysis	Analysis of institutional capacity and risks to successful and timely implementation of projects and identification of strengths and weaknesses of institutional arrangements for delivering services.	This requires individual interviews but often with a relatively small number of respondents, but where possible these should be combined with focus groups.
Agricultural calendars	Qualitative picture of activities for all enterprises and operations.	On a monthly basis, identify by sex, family position, and wage status, the person(s) responsible for farm and non-farm tasks. It requires 1-2 days.
Walking tours	Map locating main agro-ecological zones, farming systems, social groups, and infrastructure; Main problems of community and key informants for various issues. Conducted by interdisciplinary team of rural dweller sand scientists, with rural dwellers/residents taking the lead and pointing out major features and problems.	Separate walks with men and women can be informative. It requires a team and residents for half a day to 1 day.
Spatial maps	Clear visual picture of participants, beneficiaries, and constraints. Indicate by sex on maps of fields/enterprises who is responsible, provides labor, and controls resources and outputs or benefits.	It requires half a day to 1 day.
Focus group interviews	Preplanned but informal, in-depth investigation of processes, social networks, values, and beliefs.	Semi-structured interviews, usually taped, and conducted separately with women and men. It can take 1-2 hours/group (of up to 20 people).
Group and community interviews	Quick, inexpensive overview of conditions and practices across villages. Open-ended questioning of group representing more than one household.	It requires 1-2 hours/village.
Community portraits	Comparison and contrast between beliefs and practices across villages. Portraits of a variety of project villages with women and men.	It requires 1-2 hours/village.

From: Gender Chapter, PRSP Sourcebook, and Toolkit on Gender in Agriculture: Gender Toolkit Series No. 1, Monica S. Fong and Anjana Bhushan.

Rural Score Card: Assessing Rural Well-being through a Gender Lens

The Rural Score Card is a composite set of indicators that can be used to measure progress in achieving overall rural well-being in a given country. The Score Card is useful in policy dialogues with client countries in focusing attention to areas of need.

The Rural Score Card uses poverty reduction goals to set the indicators of rural well-being and takes into account the expanded connotation of poverty that includes lack of basic needs, services and capacities. It also recognizes vulnerability, powerlessness, and inequality as key aspects in poverty which are intricately associated with gender issues in rural development.

The framework for the Rural Score Card identifies five specific outcomes of poverty reduction initiatives in rural areas. The corresponding gender-related issues and indicators are useful in assessing how the poverty reduction initiatives address the needs of both men and women.

Outcome	Gender-related Issues and Indicators
The proportion of the rural population with incomes below the poverty level is reduced	 Rural population below poverty line (%) by sex Average income in rural households –male-headed and female-headed % of men and women with income below \$1 a day
Social and physical well-being is improved	 % of population with access to safe water and fuel % of rural population with access to sanitation % of rural population with access to healthcare % of rural population with access to and use of childcare services Access to rural roads and transport Division of labor in fuel and water collection by sex Rural fertility rate (average number of births per woman) Under-five mortality rates, males and females (International Development Goal) Malnutrition prevalence (% of children under 5) Rural HIV prevalence (number by sex) (International Development Goal)
Human development is fostered	 % of rural women with access to formal education Net primary enrollment ratio, males and females (International Development Goal) Changes in men-women ratio in literacy (15-24 years old) (International Development Goal) Men's and women's access to different types of training Women's access to information
Equity is fostered	 Men's and women's access to productive resources Women's legal position in inheriting and acquiring lands; gender gap in ownership of agricultural land (% of farms in individual ownership owned by women) Women's access to credit; average size of loans to women and men Men's and women's time-use in household and farming activities Men's and women's access to technology and support services in agriculture Men's and women's capacity to adopt improved technology Women's role in decision making in family and farming activities Women's roles in cooperatives, in local planning and decision making Women in leadership positions in village/community level Women's control over income and other household resources Employment in agriculture-ratio of females as a % of female labor force to males as a % of male labor force Contribution of different household members to the household economy
Food security is enhanced	 Productivity increase in men and women farmers' fields Per capita food availability –women's and girls' access to food Availability of food in female-headed households Availability of animal protein in diet

Note: This information can be obtained from several sources including household surveys, poverty assessments, Ministry of Education, Ministry of Health, and other relevant Ministries, women's organizations, legal associations, district data, focus groups, and special studies combining quantitative and qualitative methods.

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