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Gender ToT 2021 – Day 4

M&E and Reporting on Gender

Prepared and presented by Dr Marianne Meier (University of Berne)

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Photo: Meier (2018)

Proposed Agenda

1. Setting the stage and terminology

2. Different forms of evaluations

3. Multi-method and participatory/inclusive approach

4. Good practice: Data collection methods and tools

5. Guidelines for gender-responsive M&E and Reporting

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What makes an analysis / evaluation gender-responsive?
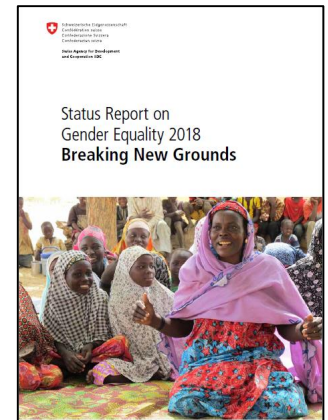
Two essential elements:

What elements does a gender-responsive analysis/ evaluation examine (content/results)?
Assessment of gender and power relationships, including structural and other causes.

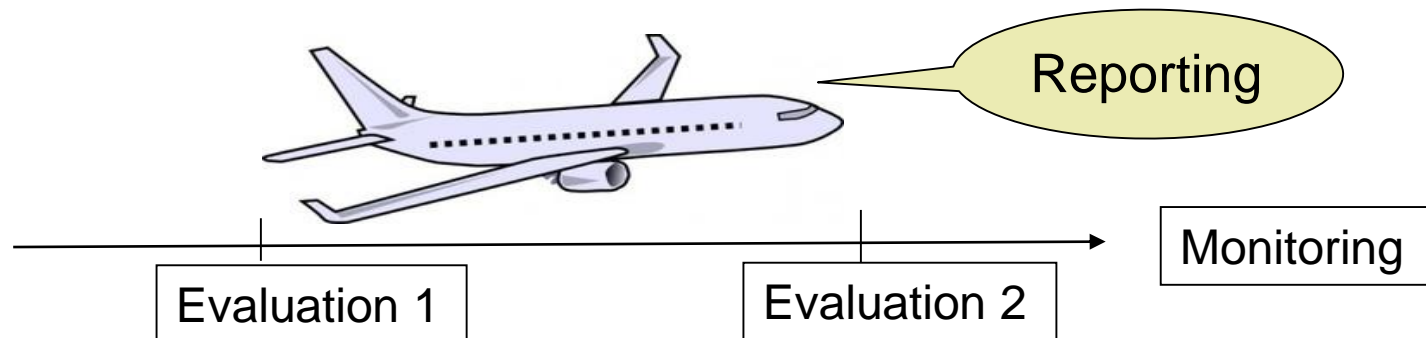**How is a gender-responsive analysis/evaluation being conducted (process/methods)?**
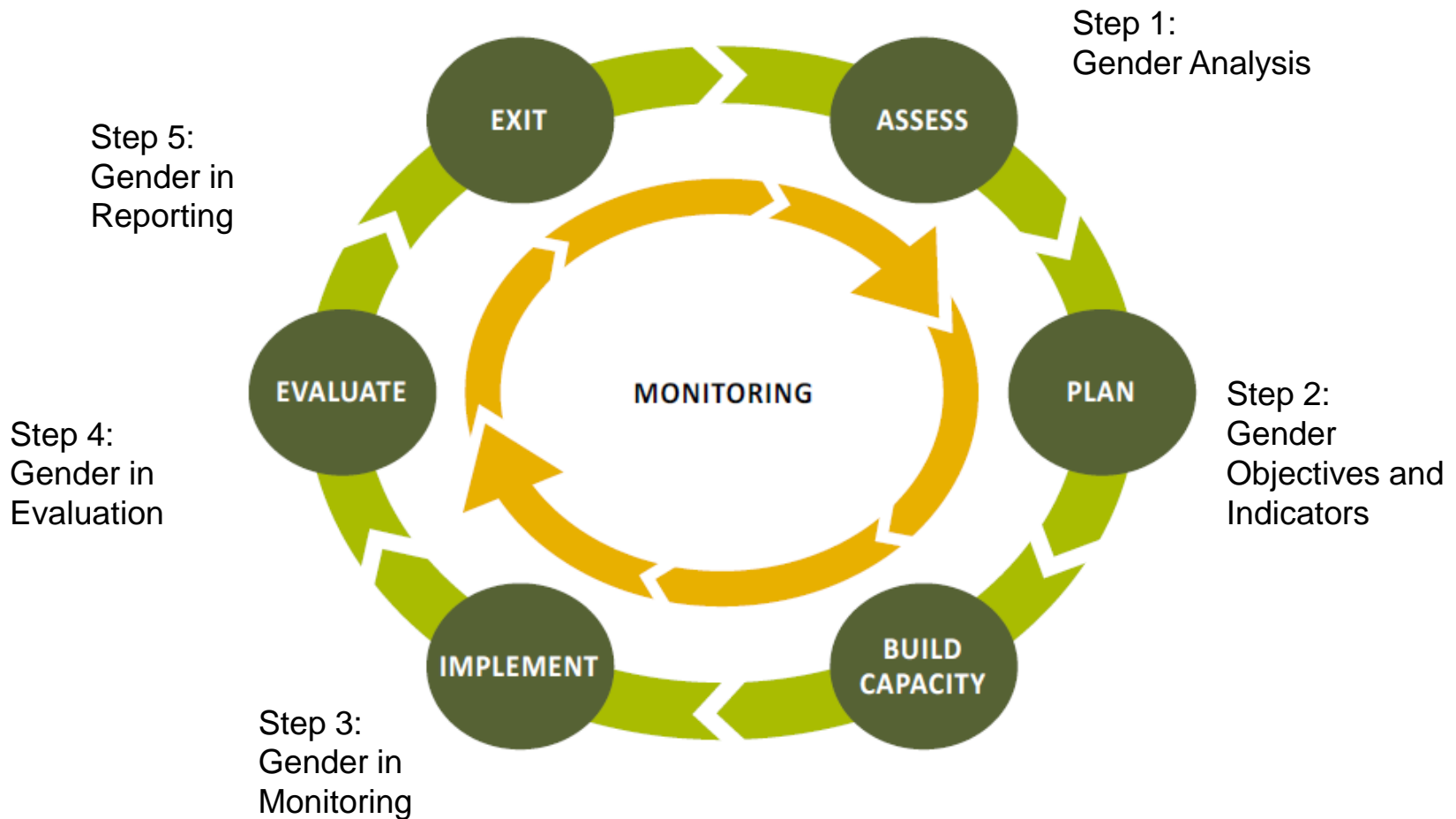Process that is inclusive, participatory and respectful of all stakeholders.

Source: UN Women (2015)

Status Report on
Gender Equality 2018
Breaking New Grounds

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What is Monitoring & Evaluation (M&E) and Reporting?

Monitoring	Continuous collection of information on results / processes / experiences within a project / programme
Evaluation	Assessment of the information collected in the monitoring process + drawing (strategic) conclusions out of it
Reporting	Communication of selected monitoring items

Source: Meier (2017)

Project Cycle Management (PCM)

Step 1:
Gender Analysis

Step 5:
Gender in
Reporting

Step 4:
Gender in
Evaluation

Step 3:
Gender in
Monitoring

Step 2:
Gender
Objectives and
Indicators

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What is Monitoring & Evaluation?

Key questions:

„Are we doing the right things?"
„Are we doing things right?"

- What have we planned?

- Have we achieved what we had planned?

- What are our experiences?

- What are our learnings?

- What do we need to change?

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Questions regarding key stakeholders

- Do stakeholders understand why it is important to undertake **M&E** and **gender analysis**?

- Do stakeholders understand why it is important to collect **sex-disaggregated information**?

- Who is the information for? Do key stakeholders understand **how it will be used**, and is it relevant to their **needs**?

- Does the **capacity** of partners and implementers to collect and analyze sex-disaggregated information need to be strengthened?

=> Need for capacity building and sensitization work?

Source: Adapted from J. Hunt. 2011. Introduction to Gender Sensitive Monitoring and Evaluation.

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What are the reasons for M&E?

1. A **learning and growing process** on
    three different levels:

    A **personal, individual**
    B **organisational, institutional**
    C **community / families / neighbourhood**

    **=> Benefit of target groups / primary
    stakeholders, if project and staff are improving**

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What are the reasons for M&E?

2.   Accountability
(to prove to others that your work is effective)

- Right to reveal failures, thus raising reliability and transparency
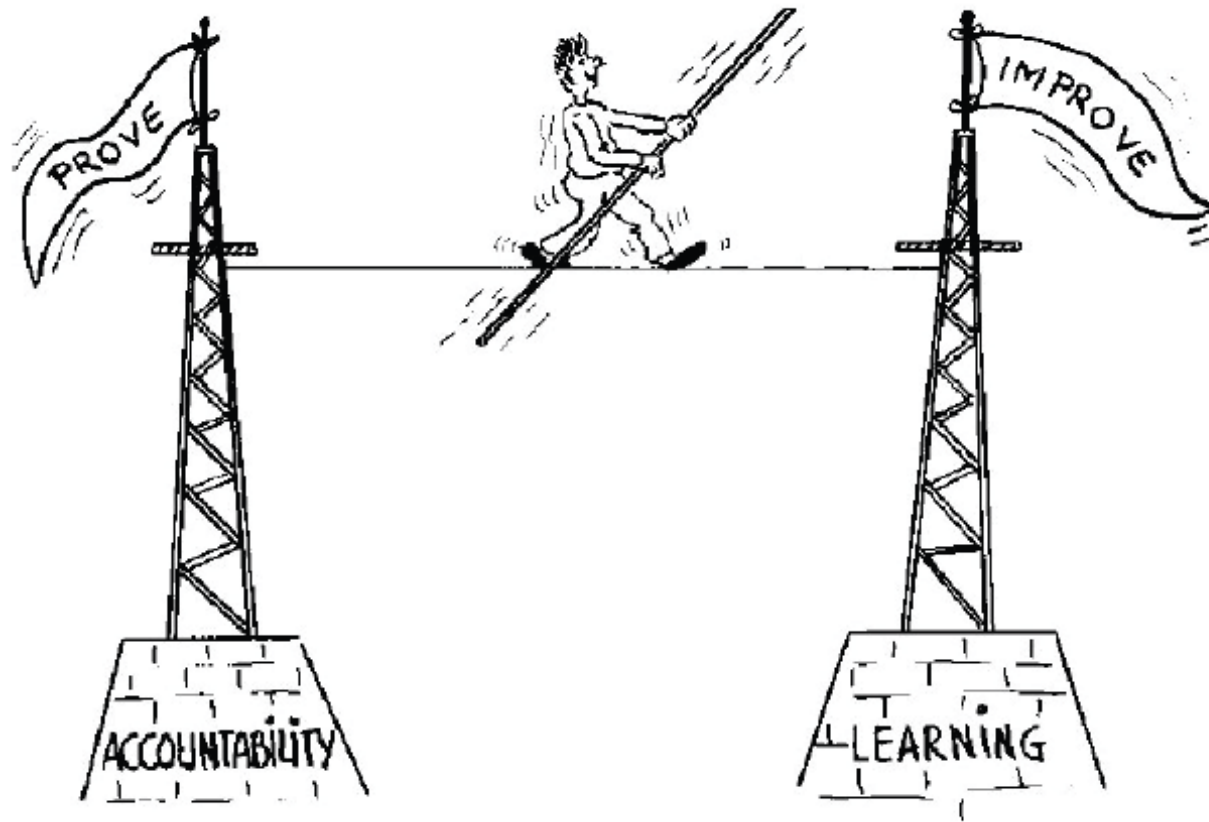- Unexpected outcomes are considered

3.   Information
(know-how and knowledge)

- Information is power (advocacy and lobbying)
- Legitimation / strenghtening position
- Source for fundraising and networking

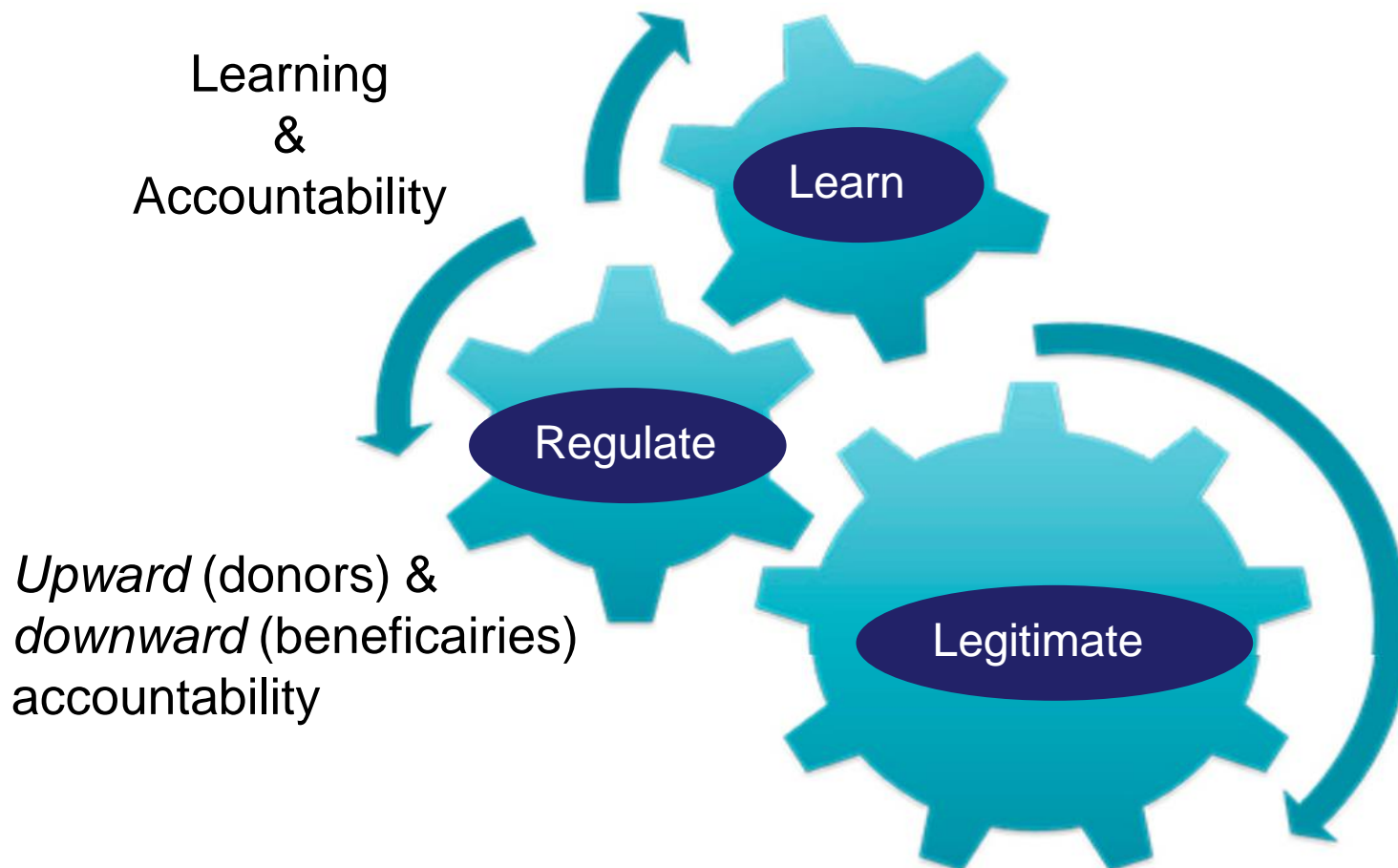Schweizerische Eidgenossenschaft
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Accountability vs. Learning

Source: Davies/Dart (2005)

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What are the reasons for M&E and Reporting?

Learning
&
Accountability

Learn

Regulate

Legitimate

Upward (donors) &
downward (beneficairies)
accountability

Source: Zewo (2016)

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M&E is NOT…

- imposed instrument of control
- optional accessory of any project ("nice to have")
- just showing success stories
- one-woman or one-man show

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But: M&E is…

- embedded and **indispensable** part of every project design ("must be")

- dialogue on development and its progress between **all stakeholders**

- participatory and creative approach of measuring change (**ownership / identity**)

Photo: Meier (2018)

Proposed Agenda

1. Setting the stage and terminology
2. Different forms of evaluations
3. Multi-method and participatory/inclusive approach
4. Good practice: Data collection methods and tools
5. Guidelines for gender-responsive M&E and Reporting

Different forms of evaluations:
Selecting appropriate approach

What is the purpose of an evaluation?

Who is it for?

What will be done with results?

Important:
Primary intended users of any evaluation should be **organization** delivering project or intervention, and ultimately the **target group**.
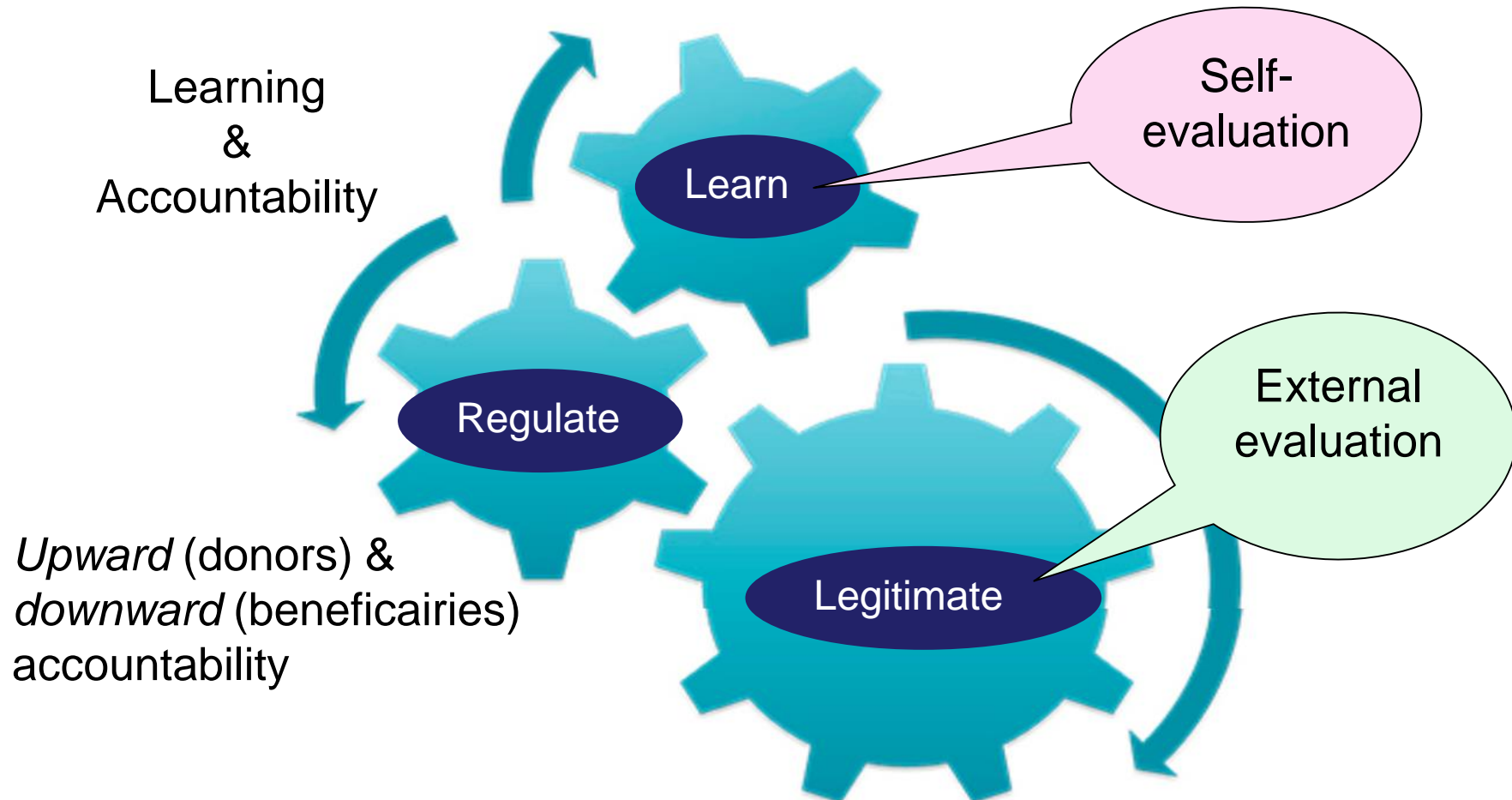
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Different forms of evaluations:
Selecting appropriate approach

PURPOSE

Improve effectiveness

Producing evidence
to scale up an intervention

Self-evaluation

➢ Focus on learning
(incl. making mistakes)

➢ Reflection and learning
within organization

External evaluation

➢ Higher degree of
accountability needed

➢ Vested interests may
falsify results

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Self-evaluation

What is self-evaluation?

Self-evaluation is a process of evaluation that is **directed by the project or organization itself**,
rather than getting someone else to do it for them.

External evaluation

What is external evaluation?

External evaluation is a process of evaluation that is **directed by an independent (neutral) consultant or research institution** mandated for this purpose.
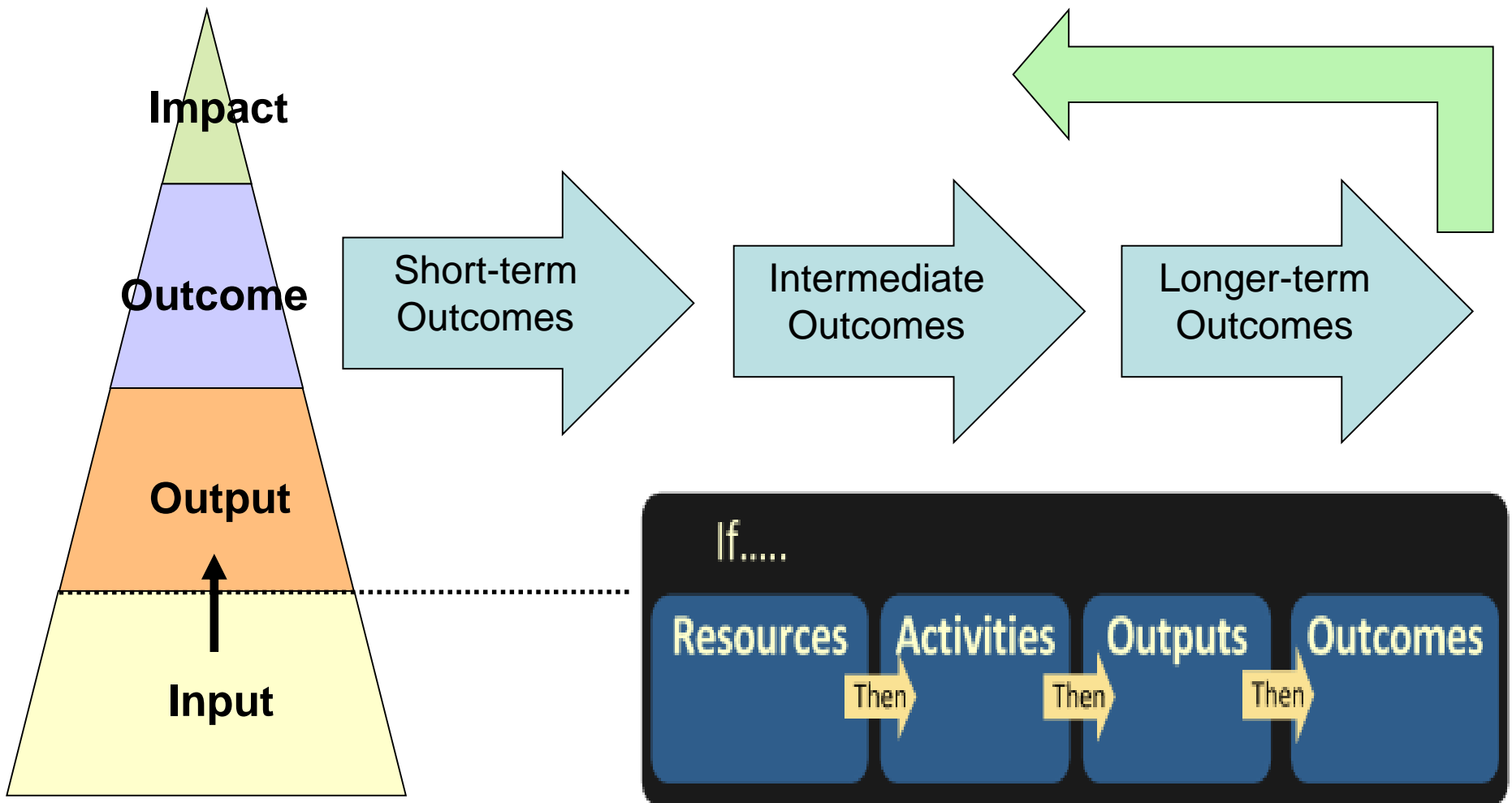
Different forms of evaluations

Myth about truth and objectivity

Sometimes there is low trust in self-evaluation, because "**it's not objective**"…

BUT: In the real world there is
no such thing as objectivity!

How to improve objectivity?

- Making feedback procedures **systematic and logic** (Logframe, ToC, etc.)
- Using **clear language and messages** in the reporting.

Impact

Outcome

Output

Input

Short-term Outcomes

Intermediate Outcomes

Longer-term Outcomes

If.....

Resources → Then → Activities → Then → Outputs → Then → Outcomes

Source: Meier (2017) adapted from Innovation Network Inc. (2016)

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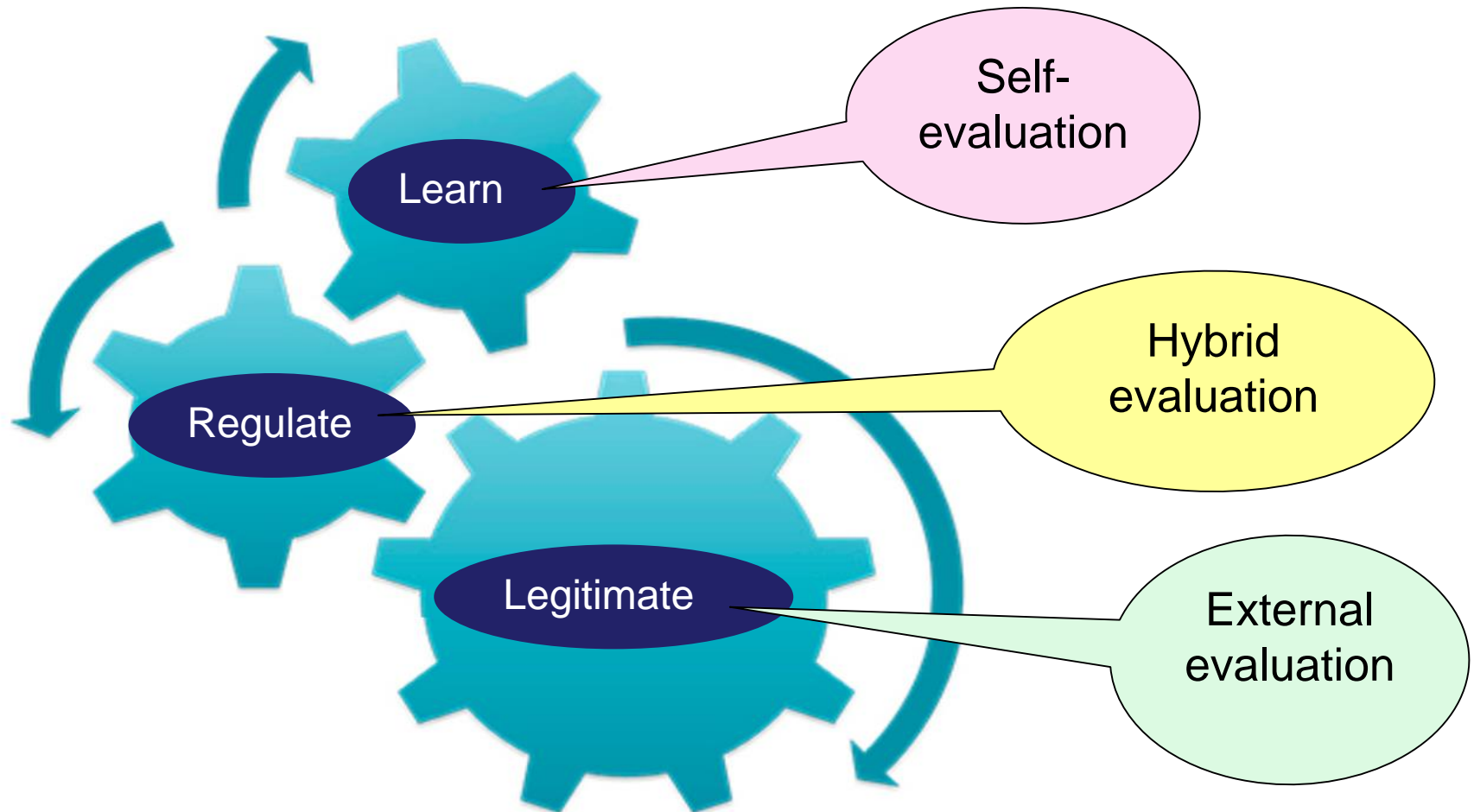Confederaziun svizra

Why encourage self-evaluation?

Self-evaluation

- Developing evaluation **logic and skills** within (partner) organizations.

- Combining reflection and practice (**learning culture**).

- Increasing **motivation**, because data is really used to improve interventions/activities.

- Evaluation done **BY** organizations themselves not TO organizations.

- Increasing **ownership** of findings and responsibility to act on findings, and thus **sustainability**.

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What are the reasons for M&E and Reporting?

Learn

Regulate

Legitimate

Self-evaluation

Hybrid evaluation

External evaluation

Source: Zewo (2016)

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Different forms of evaluations

Moving beyond the external vs. self-evaluation discourse?

Hybrid evaluation…

- **combines** the best of independent and self-evaluation.

- balances the need for organizational **learning**, building evaluation **capacity**, and the need for independent **verification**.

- allows independent evaluator to become embedded or attached as a **key resource** in the evaluation.

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Different forms of evaluations:
Principles of hybrid evaluation

- Participatory approach

- Close communication and cooperation between independent evaluator and staff

- Complementary expertise in different fields

- Giving confidence, but constantly checking quality of evaluation (adding credibility)

- Simultaneous processes:
  learning, capacity-building and analysis

- Increased motivation and feeling of ownership

- Lower cost

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Photo: Meier (2018)

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Gender-responsive evaluation and PCM

"Gender-responsive evaluation…

…can enhance gender equality and the empowerment of women by **incorporating gender and women's rights dimensions** into evaluation approaches, methods, processes and use.

Thus the evaluation is not only a driver of positive change towards gender equality and the empowerment of women, but the **process itself also empowers the involved stakeholders** and can **prevent further discrimination and exclusion**."

Source: UN Women (2015, p. 4)

Applied M&E in projects / programmes

Reality in "the field":

- often working with vulnerable groups
  (children, traumatised people, etc.)

- high illiteracy rate

- high fluctuation

- scarce resources

- time pressure

- lack of know-how

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Indian Legend

"The Blind Men & The Elephant" by John Godfrey Saxe
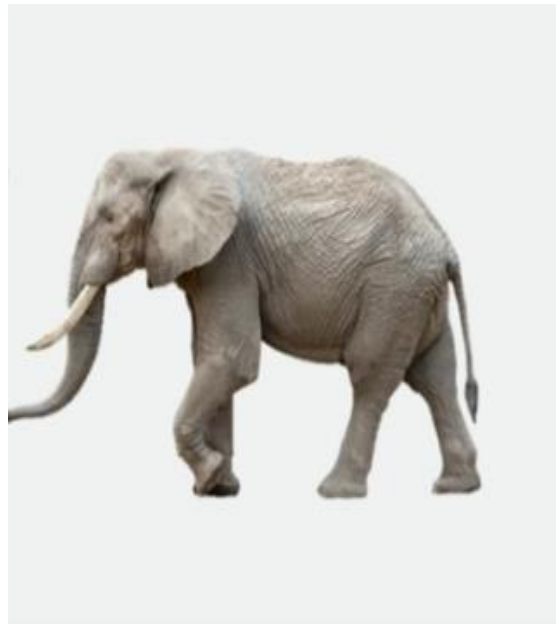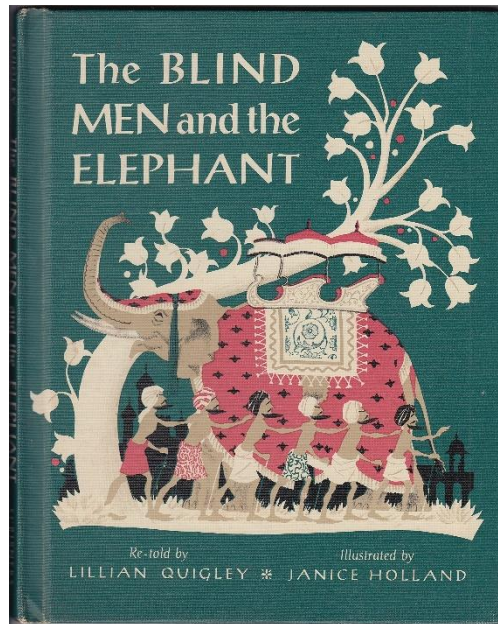
Source: https://www.youtube.com/watch?v=mkoT_O13EZA (2:38 min.)

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Multi-method approach (perspectives)

Indian Legend

Artist: Sophia Tepe

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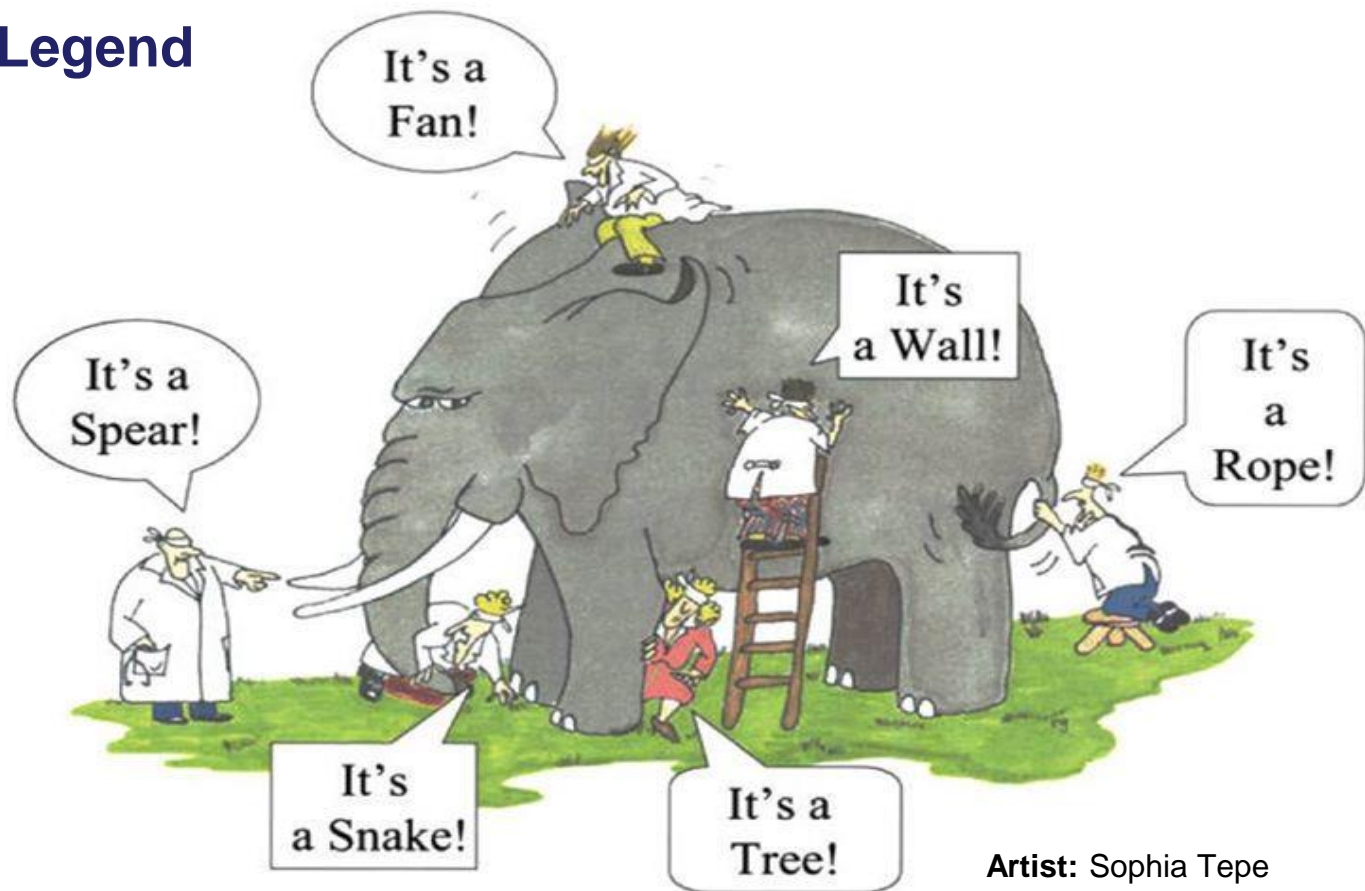
5-star Principles of „good" M&E

Scientifically sound

Cost-
effective

Relevant
+ useful

**Multi-method
approach** (perspectives)

Inclusive /
participatory

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Traditional, standardized M&E tools

- Questionnaires
- Interviews
- Focus group discussions
- Etc. …………

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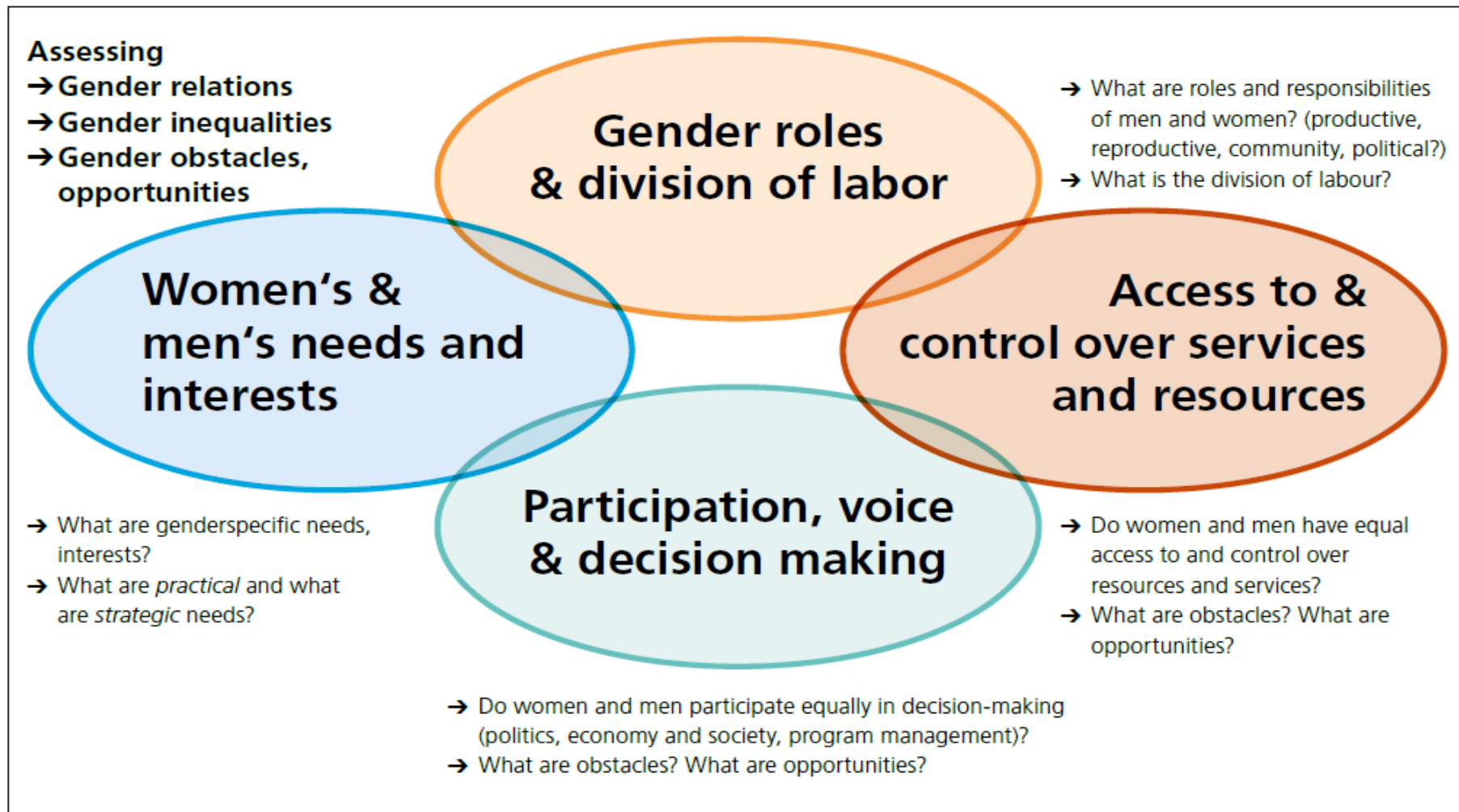Confederaziun svizra

Alternative, innovative M&E methods

- Foto/video monitoring
- Story-telling / poetry clubs
- Computer blogs / diaries
- Community Mapping
- Painting / sculpture
- Most Significant Change
- Free-listing
- Etc. …………

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Gender Analytical Framework: *Gender lens*

Assessing
→ **Gender relations**
→ **Gender inequalities**
→ **Gender obstacles, opportunities**

Gender roles & division of labor

→ What are roles and responsibilities of men and women? (productive, reproductive, community, political?)
→ What is the division of labour?

Women's & men's needs and interests

Access to & control over services and resources

Participation, voice & decision making

→ What are genderspecific needs, interests?
→ What are *practical* and what are *strategic* needs?

→ Do women and men have equal access to and control over resources and services?
→ What are obstacles? What are opportunities?

→ Do women and men participate equally in decision-making (politics, economy and society, program management)?
→ What are obstacles? What are opportunities?

Traditional, standardized M&E tools

STRENGTHS	WEAKNESSES
Comparable	Repetitive
Widely recognized (science-based)	Rigid rules
Interpretation within clear framework	Loss of content due to translation
Quantitative and qualitative	Without emotions
Predictable	Often donor-driven
History of experience	Requires literacy
Etc.	Etc.

Alternative, innovative M&E methods

STRENGTHS	WEAKNESSES
Explorative (unintended outcomes)	Pseudo-psychological
Captures emotions	Does not provide easily comparable data
Participatory	Lack of experience
Dynamic, flexible	Difficult to interpret
Motivating	Infrastructure needed (not always)
Visible (useful for PR and Fundraising)	Scientific reliability often questioned
Etc.	Etc.

Compromise:
Multi-method M&E approach

Multi-method M&E is a participatory approach that **systematically combines** …

traditional, standardised M&E tools

WITH

alternative, innovative M&E tools

Photo: Meier (2018)

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«Irony of Measurement»

<u>Relatively important</u> things are measured, because the <u>really important</u> ones cannot be quantified, and are therefore **not** measured.

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Tool 1: Community Mapping

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Tool 1: Community Mapping

Namibia

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Tool 2: 'Most Significant Change' Stories

Question 1:
What has been the most important/significant change that happened to you and/or your community since the programme started?

Question 2: Why is this change important for you?

Tool 3: Self-Recording Video

Malawi

Tool 4: Picture Monitoring

Socio-economic differences
(school infrastructure)
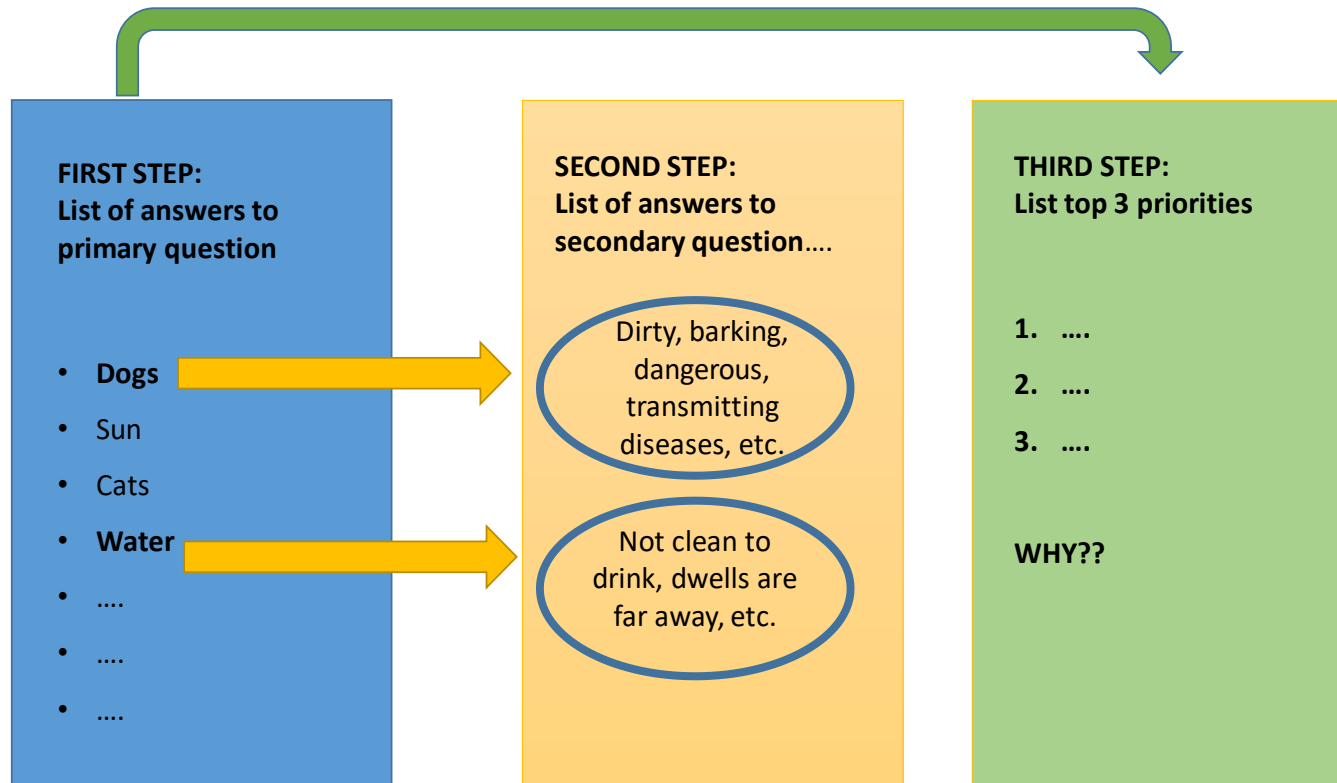
ZAMBIA
Lusaka (Bauleni)

MALAWI
Mulanje (Chanunka)

SOUTH AFRICA
Port Elisabeth (New Brighton)

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Tool 5: Free-listing

FIRST STEP:
List of answers to primary question

- **Dogs**
- Sun
- Cats
- **Water**
- ….
- ….
- ….

SECOND STEP:
List of answers to secondary question….

Dirty, barking, dangerous, transmitting diseases, etc.

Not clean to drink, dwells are far away, etc.

THIRD STEP:
List top 3 priorities

1. ….
2. ….
3. ….

WHY??

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Photo: Meier (2018)

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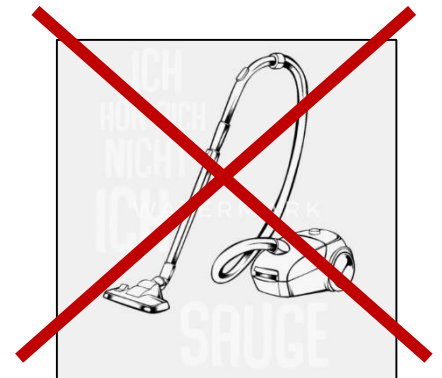5. Guidelines for gender-responsive M&E and Reporting

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Guidelines for gender-responsive M&E and Reporting

1. M&E from the very **beginning**
   (even before the project starts in the planning phase)

2. Need for **baseline** information and **sex-disaggregated** data
   (opportunity will not come back)

3. Minimal **ethical code** must always be respected
   (anonymity / ethical committees / consent forms / etc.)

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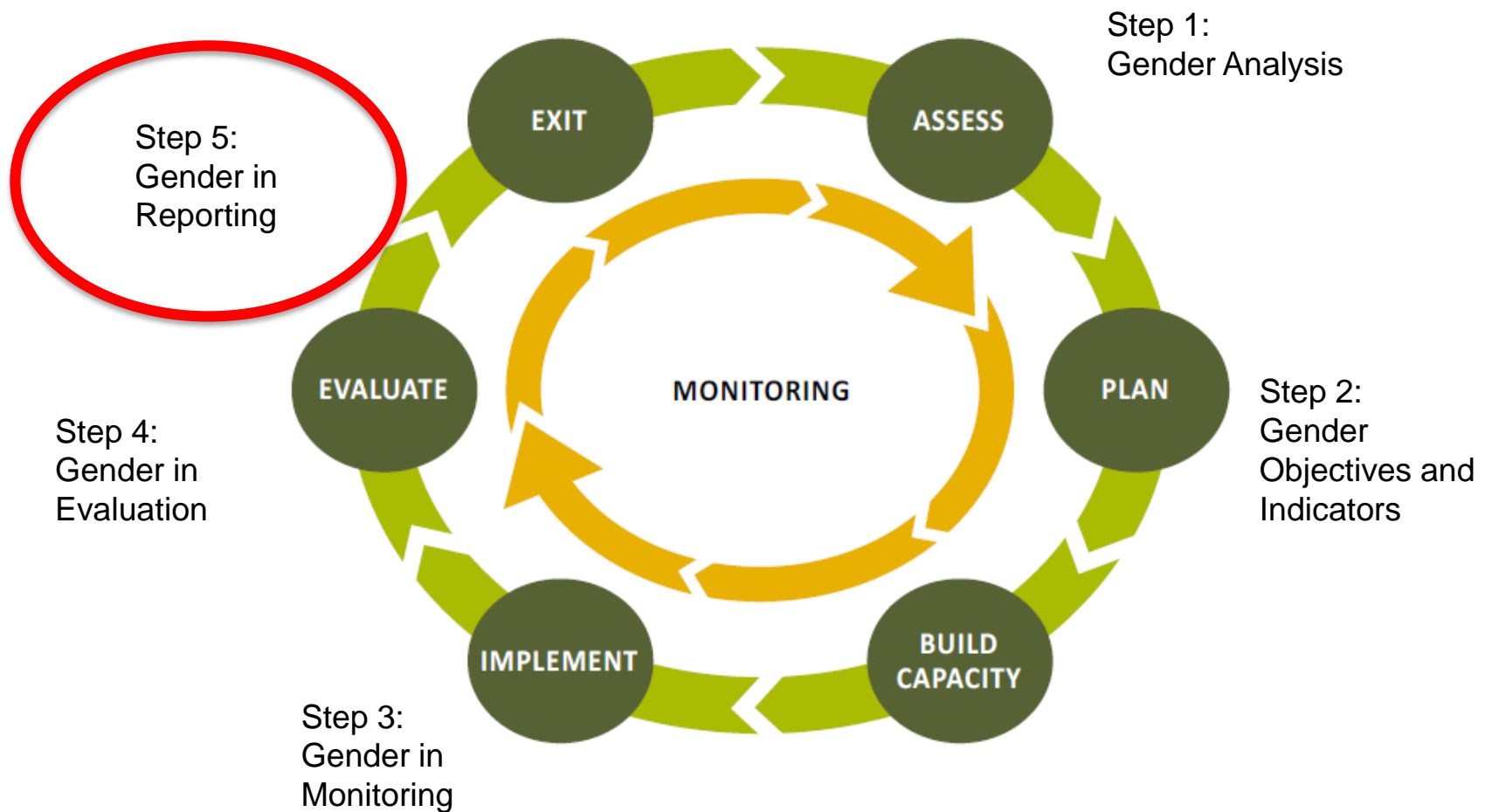Confederazione Svizzera
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Guidelines for gender-responsive M&E and Reporting

4. Active **involvement of locals** (especially staff) from the beginning to increase ownership (sustainability) => cognitive debriefing / psychological support

5. **Do no harm** (ex. validated questionnaires)

6. **Transparency** of M&E activities (honest and proactive information)

7. Reporting: M&E **results shared** with respondents (improving situation of "target group" in the long run)

Project Cycle Management (PCM)

Step 1:
Gender Analysis

Step 2:
Gender Objectives and Indicators

Step 3:
Gender in Monitoring

Step 4:
Gender in Evaluation

Step 5:
Gender in Reporting

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Guidelines for gender-responsive M&E and Reporting

Power-Interest-Matrix

Source: A. Mendelow (1991)

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Guidelines for gender-responsive M&E and Reporting

**Recommendations for
implementing partner organizations (NGOs, etc.)**

- Plan and build your own M&E unit within your organisation (capacity building).

- Be creative and proactive as an implementing organisation to come up and develop your own tailor-made M&E concept (motivation / ownership).

- Dare to show mistakes and failures
  (it raises long-term credibility and trust).

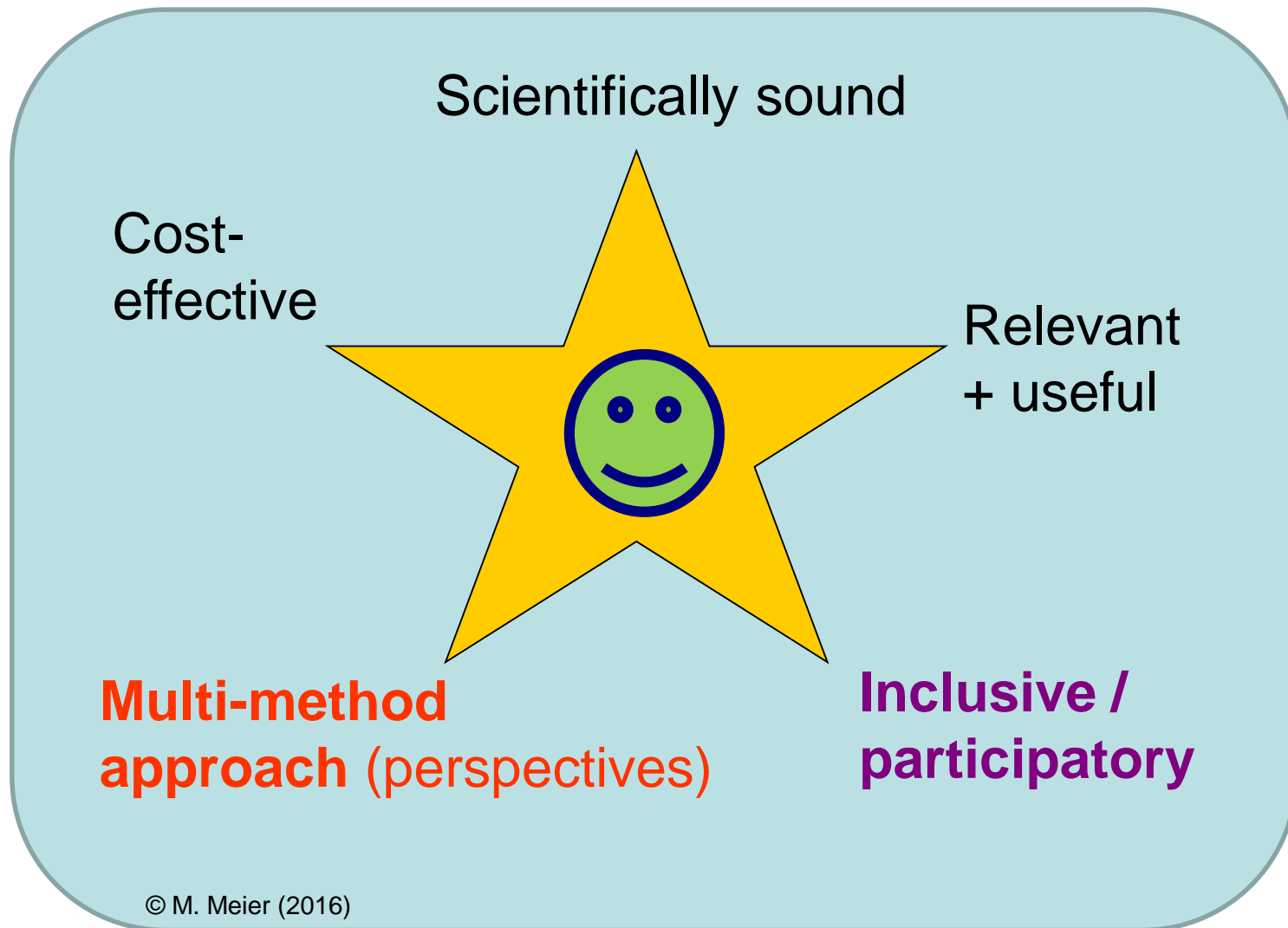# Guidelines for gender-responsive M&E and Reporting

CLOSING REMARKS

Methodological decisions need
to be determined by…

1. **people addressed by investigation**
2. **context**
3. resources
4. research question

Not the opposite!

5-star Principles of „good" Gender Analysis

Scientifically sound

Cost-effective

Relevant + useful

Multi-method approach (perspectives)

Inclusive / participatory

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Thank you! Merci beaucoup!

Photo: Meier (2017)

Contact: marianne.meier@izfg.unibe.ch