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Achieving Gender Equality in Education: Trends in Research and USAID Programming (1996-2006)

A Synthesis Report

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Disclaimer:

The author's views expressed in this report do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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ACRONYMS AND ABBREVIATIONS

ADS	Automated Directives System
AFR	Africa
AIDS	Acquired Immunodeficiency Syndrome
ANE	Asia and the Near East
EGAT	Economic Growth, Agriculture, and Trade
E&E	Europe and Eurasia
EQUATE	Achieving Gender Equality in Education
HIV	Human Immunodeficiency Virus
ICT	Information and Communication Technology
IR	Intermediate Result
LAC	Latin America and the Caribbean
NGO	Non-Governmental Organization
RFA	Request for Assistance
RFP	Request for Proposals
SO	Strategic Objective
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USAID	United States Agency for International Development
WID	Women in Development

GLOSSARY

Equality means that males and females have equal rights, freedoms, conditions, and opportunities for realizing their full potential and for contributing to and benefiting from economic, social, cultural, and political development.¹ It means society values males and females equally for their similarities and differences and the diverse roles they play. It signifies the long-term outcomes that result from gender equity strategies and processes.

Equity strategies refer to the processes used to achieve gender equality. Equity involves fairness in representation, participation, and benefits afforded to males and females. The goal is that both groups have a fair chance of having their needs met and that they have equal access to opportunities for realizing their full potential as human beings.

Gender refers to a set of qualities and behaviors expected from males and females by society. Gender roles are socially determined and can be affected by factors such as education or economics. Gender roles may vary widely within and between cultures, and often evolve over time.

Gender dynamics refers to the relationships and interactions between and among boys, girls, women, and men. Gender dynamics are informed by socio-cultural ideas about gender and the power relationships that define them. Depending upon how they are manifested, gender dynamics can reinforce or challenge existing norms.

Parity in education refers to equivalent percentages of males and females in an education system (relative to the population per age group). Parity is essential but not sufficient for achieving gender equality.

Sex refers to the biological differences between males and females. Sex differences are related to males' and females' physiology and generally remain constant across cultures and over time.

¹ Adapted from Organisation for Economic Co-Operation and Development (OECD). *DAC Guidelines for Gender Equality and Women's Empowerment in Development Co-operation*. Paris: OECD, 1998.

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EXECUTIVE SUMMARY

Since the 1980s USAID has been a leader in targeting educational programs to meet girls' needs. While USAID's pioneering work has highlighted the importance of girls' education, the focus has largely remained on barriers to access and education activities aimed at achieving universal access to education and gender parity in enrollment rates. The focus on access and parity meant that education programs did not consider the full range of issues that impact girls' and boys' education, such as the quality of education or the learning process. As the focus of education programs expands beyond questions of access, USAID has a unique opportunity to build on its pioneering work and renew the agency's commitment to achieving gender equality in education.

This report reviews the literature on gender equality in education during the period from 1996-2006. It examines literature within the larger development community and, more specifically, within USAID. The report lays the foundation for the development of a systematic framework that will help programmers achieve gender equality in their basic education projects. The report analyzes trends in USAID basic education programming and funding from 1996 to 2003, revealing a strong emphasis on input-oriented strategies designed to improve girls' access to education.

Budget and programming data for the 1996-2003 period is compiled and evaluated using a gender programming index that assesses the extent to which gender concerns are being addressed in USAID basic education programs. The analysis reveals that most USAID programs utilize an approach to basic education that is limited to counting the numbers of boys and girls in school and does not fully address gender inequities in the educational system. While access-focused interventions targeted girls with success, quality interventions have been largely gender neutral.

Achieving gender equality in education, however, requires an understanding of how the roles and relationships between males and females impact the education system and boys' and girls' educational experiences. Interviews with USAID officers revealed a level of uncertainty in how to address gender equality in education. Some managers and implementers believe that the task of achieving gender equality is sufficiently addressed through the emphasis on girls' education, while others believe that gender equality has been taken over, or hijacked, by girls' education. To move beyond a surface-level understanding of gender, managers and implementers need concrete, actionable tools to help them in the design, implementation, monitoring and evaluation of development projects. The research conducted for this report forms the basis for the development of a framework that will clarify gender terminology and help ensure that gender equality is an integral component of all education programs.

INTRODUCTION

Prepared for the USAID Office of Women in Development by EQUATE: Achieving Gender Equality in Education, this report examines approaches to achieving gender equality in education in USAID and within the larger development field. The report centers on two main questions: what has been learned about addressing gender-related issues in education and what has USAID contributed to gender equality in education. A review of international development literature provides the foundation for the opening section, which addresses trends within the international education community. The next section contains an overview of USAID funding allocations for basic education from 1996 to 2003; this is followed by a regional breakdown of programming trends during that period. The final section introduces a gender programming index that compiles budget and programming information to determine the extent to which USAID basic education programs have addressed gender concerns. This report provides a valuable overview of USAID and international efforts, with the goal of developing a more comprehensive framework to guide USAID in addressing gender equality issues in education.

Methodology

This report is a synthesis of three research efforts:

- An analysis of USAID basic education project documents, including:
 - Congressional Budget Justifications, which provide a broad overview of mission strategies and programs
 - Country Strategic Plans, which provide detailed, five-year strategies
 - R4 and annual reports from the regional bureaus and missions, which report results and progress
 - Requests for proposals (RFP) and requests for applications (RFA), which detail expectations of sector projects
 - Mid-term and end-of-project reports, which evaluate progress and problems
- A review of published research reports and planning and management tools produced by USAID and other donors on girls' education
- Interviews and small group discussions with selected USAID/W and Mission education officers and implementing partner staff that have had responsibility for projects addressing gender equality in education

This approach allowed for a rough triangulation of data and the presentation of general conclusions. Findings from the literature review bolstered the analysis of the USAID documents. A total of 992 documents were reviewed as part of this effort. A gender index was then used to assess USAID's treatment of gender issues. Interviews and group discussions with thirty-six USAID officers helped confirm, question, and enrich the findings from written sources and helped illuminate possible new opportunities. An early draft of the synthesis report was shared with a group of gender and education experts and their feedback was incorporated into the final draft.

There were several limitations in conducting the analysis of funding allocations and project interventions, most of which centered on the availability and appropriateness of the information EQUATE was able to obtain. The analysis of interventions was dependent on the existence and availability of project design documents and reports; however, there is a lack of consistent, accurate, and easily accessible documentation. Interventions are generally poorly documented and publicly available reports to Congress, for example, were often the only reports accessible. Many USAID officers indicated that this was a systemic problem in the agency, commenting that there were many “wonderful things” reported in girls’ education, but no “good reports”. Determining successful strategies was hampered by the lack of rigorous examinations of interventions. The documentation that does exist is anecdotal, context specific, and focuses on single interventions sometimes referred to as “boutique” projects. EQUATE had little success in obtaining RFA/RFP information from USAID and winning contract proposals from contractors, which would have enriched the analysis by providing additional information regarding the design of interventions. No complete sets of project documents were available that would allow researchers to follow and analyze the process and outcomes from RFP/RFA, winning contract proposal, to mid-term and final assessment outcomes.

The budget analysis was designed to determine the type of funding allocated to gender-related goals. This analysis was complicated, however, by the absence of detailed tracking mechanisms, an obstacle previously noted by Rawley and by Kane and Yoder in their earlier examinations of USAID programming.² The limited data made it difficult to determine the portion of funding that went specifically for gender-related concerns. Similarly, the budget analysis was based on appropriation levels and not funds committed or spent, meaning that the analysis does not reflect the actual level of spending on gender-related concerns. In addition, changes in reporting requirements since 2003 made an analysis of funding data for the period from 2003-2006 impossible. As such, the budget analysis is limited to an examination of funding allocations for the period from 1996-2003.

HISTORICAL TRENDS IN INTERNATIONAL EDUCATION

In the early 1980s demographers and economists concluded that literacy rates among women were associated with economic development and demographic change, including lowering birth rates. This research spawned studies on girls’ education, policy changes in international development agencies, and changes in practice in most developing countries. The importance of gender differences in providing education for all children has been on the agenda of development agencies since the 1980s, becoming prominent in the 1990s. During this time, three main themes have emerged:

² See *Including Girls in Basic Education: Chronology and Evolution of USAID Approaches*, Christina Rawley, Washington, DC: ABEL2, 1997 and *The Girls’ Education Literature Review*, Eileen Kane and Karla Yoder, Washington, DC: USAID, 1998.

- Educating girls should be high priority for all governments, as it has significant benefits and is a key to economic and social development.
- Barriers to accessing and completing a basic education remain high for girls in much of Africa and South Asia and in parts of many countries in other regions.
- A number of strategies and interventions have been effective in lowering barriers; however, the selection of strategies must be based on a good understanding of the particular conditions that give rise to barriers.

The benefits of girls' education

The growing body of literature on the social and economic benefits of girls' education focuses on the relationship between enrollment rates and desired social phenomena. Historically, the literature began by examining the relationship between girls' education and demographic change and then expanded to other social and economic benefits: higher wages, economic growth, productive farming, healthier children, greater political participation, support for democracy, and a reduction in HIV/AIDS prevalence, domestic violence, and genital cutting.

The literature on benefits is not without controversy as some feminist scholars question the nature of the relationship between girls' education and development. Their concerns include: (1) the evidence of causality between female education and social and economic benefits; (2) the claim for high private and social rates of return, particularly to primary education; and (3) expanding access to reach all children, including girls, without taking into account the deep gender divisions in many cultures (Subrahmanian 2002).

Barriers to educating girls

Even though the benefits of basic education have been publicized, many girls still have little or no access to formal or non-formal education. Of the approximately 100 million primary school aged children not in school in 2002, 55 percent were girls (UNESCO 2005). Much of the literature presents the barriers to increasing girls' enrollment and retention within a demand and supply framework. Demand factors refer to families' willingness or ability to pay the actual and opportunity costs of sending girls to school, whereas supply factors refer to the accessibility and quality of schools. Though not comprehensive, the demand-and-supply framework provides an understanding of most barriers to girls' education.

Strategies and interventions

Based on the literature, interventions to address the barriers to education can be grouped into the following categories:

- Reducing costs to families
- Making schools more accessible
- Improving the conditions and treatment of girls
- Improving the quality of instruction
- Strengthening support to government

- Addressing the social, cultural, and economic context of education

Reduce direct costs to families

Many parents, especially those living in rural areas, do not send their children to school because they cannot afford to do so or they perceive the cost to be too high. However, parents are generally more willing to pay for boys' education because of the perception of a greater economic benefit from educating boys. Interventions to promote girls' education by reducing direct costs to families include the abolition or waiving of school fees, cash transfers to families (including scholarships and stipends), and school feeding programs.

- School fees – Countries such as Kenya, Malawi, South Korea, Tanzania, Thailand, Uganda, and Zambia noticed marked increases in enrollment rates after the abolition of school fees, with rates doubling in some areas.
- Scholarships and stipends – Cash transfers are an instrument to get and keep girls in school by alleviating the direct cost of education. Cash transfer programs have been especially effective in Latin America in getting and keeping poor children in school.
- School feeding – An alternative approach to subsidizing education is through the establishment of a school lunch program, which serves as an incentive to many families. These programs help raise enrollment rates and promote greater parity in education.

Reduce opportunity costs to families

Studies of the demand for education show that opportunity costs also keep children out of school. This is especially true for girls, who are depended upon to care for younger siblings, do household chores, and even bring in money from outside jobs. Most recent efforts to lower the opportunity costs of educating girls include reducing child labor and providing day care for pre-school age children.

Make schools accessible

The obvious supply-side strategy for improving girls' education is to build more schools in areas where children currently travel long distances between home and school. Since proximity to school is a major factor in many families' decisions about educating their girls, development projects have often focused on building new schools. In Egypt, Pakistan, and Afghanistan, new schools led to increased enrollment.

Another strategy for increasing accessibility is to make the school calendar and schedule flexible so that children do not have to sacrifice family work for school. USAID's experience in Pakistan, Morocco, and other countries has confirmed that adjusting school calendars and daily schedules to local farming seasons, fixed events, and other local needs increases enrollment and attendance.

Improve the treatment of girls

The presence of a school is not incentive enough for all families to enroll their daughters. There is a wide—though not universal—consensus that many girls do not enroll in school or that they drop out because they are endangered or ill-treated. Strategies include building community schools, equipping schools with latrines and

wells, recruiting and training female teachers, sensitizing teachers' to be respectful and treat girls fairly, ensuring a positive depiction of girls in the curriculum and materials, and combating violence in schools.

- Community schools – Community schools involve parents and other community members directly in school support and activities, enabling them to address many of the conditions that make schools unattractive to girls. Community schools can be a part of the formal (government) school system or alternative schools built and managed by non-governmental organizations (NGOs).
- Female teachers – Recruiting and training more female teachers is particularly important in conservative societies where parents do not want their daughters in classrooms with male teachers. Recruiting and training more female teachers in the Baluchistan province of Pakistan helped to double girls' enrollment and also increased boys' enrollment.
- Sensitizing teachers – Classroom observations indicate that teachers treat girls differently than boys, with many teachers unaware of their biases. USAID and others have supported activities that make teachers more sensitive to the particular needs of girls and boys in the classroom.
- Bias in curricula and materials – Analyses of curricula and textbooks reveal depictions and expectations of women and girls as inferior to men and boys. Recognition of these gender-biased perceptions has led to the revision of curricula and materials in many countries.
- Combating violence – There is increasing evidence that the widespread violence against girls in school is a detriment to their participation in education. Interventions to address violence include life skills curricula, youth leadership programs, teacher training, advocacy, and policy measures, such as effective teacher codes of conduct.

Improve the quality of instruction

Instruction must be of sufficient quality and relevance to pupils' lives to ensure that they learn basic skills such as reading, writing, math, and life skills. According to one long-term USAID program officer, "girls [cannot] afford to stay in [a] school that is of poor quality." Good quality instruction requires, at a minimum, an amenable setting, a competent teacher, and instructional materials. A poor quality of instruction negatively affects both boys and girls, as students are unable to gain and retain knowledge that will help improve their quality of life.

Improving the quality of schooling for boys and girls requires a sustained provision not only of "inputs" (classrooms, teachers, and instructional materials) but also a well-managed system that continuously renews these resources in response to varying needs and conditions throughout the country. USAID and other agencies have supported reforms of basic education systems throughout Africa and in Pakistan and Guatemala. These reforms impact girls and boys and are critical to lasting improvements in the quality of education for all children.

Strengthen support for national education efforts

Countries where girls' education is poor often have the weakest ministries of education. Direct interventions to lower barriers to girls' participation must be accompanied by efforts to support ministries. Much of the support to governments has come in the form of assistance to system reforms. Other activities to support national education efforts include advocacy, awareness raising, and community engagement. External support – from civil society, local industry, and the international community – is a critical component to supporting governments' efforts to address gender equality in education.

- Policy support – Legislative change and reform are critical to providing an enabling environment for gender equality. To pass legal measures that mainstream gender into institutions, including schools, governments need popular support and political pressure to get funding.
- Engaging civil society – International donors have endeavored to help raise awareness of the importance of basic education, particularly for girls, at the international, national, and community levels. While USAID has worked at the community level to encourage parents to send their daughters to school, other projects have focused on networking and community partnerships with the business, religious, and media sectors.

Address the social, cultural, and economic context

Much of the literature on gender equality in education stresses the importance of addressing the social, cultural, and economic factors that influence basic education access and quality. The main strategic responses have been to empower women, who have a strong influence over decisions about their children's education, and to alleviate poverty.

- Empowering women – There is some evidence that participation in literacy and other training activities improves women's capacity to be effective change agents in their households and communities, thereby enhancing the well-being of their children, families, and communities.
- Alleviating poverty – According to the World Bank, poverty is the primary barrier to social and economic development, including participation in education. Girls' education becomes part of a circle of cause and effect. Educating girls contributes significantly to social and economic development, thus affecting poverty; at the same time, poverty prevents greater participation of girls in education.

The literature demonstrates that, historically, programs have focused on input-oriented strategies to increase girls' access to education.

EMERGING TRENDS IN INTERNATIONAL EDUCATION

A significant trend that is emerging within the international education community is the need to look beyond access issues to more critically examine the quality of education and its implications for male and female students. Educators have already begun to consider demand-side interventions such as student motivation

and teacher remuneration in addition to traditional supply-side interventions such as school construction and textbook provision.

As enrollment and parity goals are met, countries are beginning to face new challenges and goals that push the bounds of basic education beyond the school environment and to secondary and post-secondary school levels. Non-formal education such as interactive radio programming and after-school youth clubs are two examples of promising efforts to involve and consider the needs of girls and other disadvantaged groups. Such approaches are often able to reach across sectors, aligning educational needs with health concerns, entrepreneurship, and social safety nets, as USAID’s Education for Girls Program in Morocco and the Girls’ Education Advocacy Program in Ghana demonstrate.

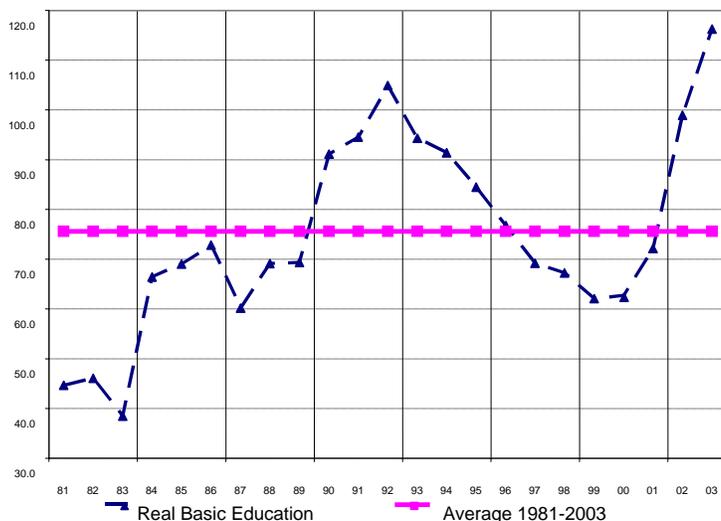
TRENDS WITHIN USAID FOR THE PERIOD 1981-2003

This section reflects upon data collected from 800 USAID reports and other documents to determine the character and scope of the agency’s support to girls’ education. An analysis of funding for basic education projects is followed by a discussion of programmatic responses to problems in educating girls. To quantitatively assess USAID’s funding contributions towards gender-related education activities, a gender programming index is introduced in the last section.

Funding Investments in Basic Education

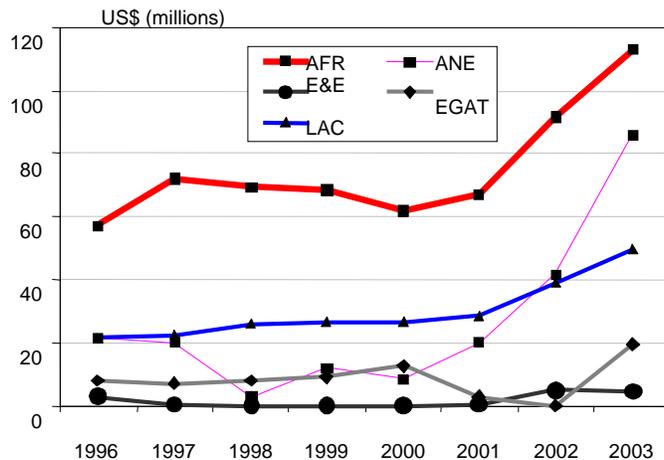
Since 1981, USAID support for basic education has fluctuated significantly. Figure 1 shows spending since 1981, with adjustments for inflation. Real spending increased dramatically from 1981-1992, declined steadily from its 1992 peak to a bottom in 2000 and then accelerated rapidly in the last five years. The spending levels of the last few years are higher than most of the previous decade, and 2003 levels are at an all time high, about 12 percent above the 1992 peak.

Figure 1. Real Basic Education Spending (Constant 1981 \$)



The sharp increase in funding in the early 2000s resulted from striking changes in the budgets of the Africa and Asia Near East (ANE) regions. Figure 2 provides a further breakdown of basic education funding by region for the period from 1996-2003.

Figure 2. USAID Basic Education Budget, 1996-2003, by region



In Africa, basic education funding has risen steadily since 1996, jumping from \$66 million in 2001 to \$91 million in 2002 and \$113 million in 2003. Funding in 2003 topped all previous years and was spread over the largest number of countries (18) to date.

During the period from 1996-2003, the most dramatic increase in basic education funding was in the ANE region where the budget soared from \$8 million in 2000 to \$86 million in 2003. As in the Africa region, basic education funding in ANE in 2003 was higher than that of any previous year. It was more than double the 2002 budget and was spread over the largest number of countries (12) for the 1996-2003 timeframe.

Funding for basic education in the Europe and Eurasia (E&E) region was relatively sparse and non-existent before 2001. In 2002 and 2003, funding was tenfold that of the previous years (\$4.95 million and \$4.4 million, respectively). Seven countries in E&E received funding in 2003 which included funding levels of \$1 million or more in Armenia, Tajikistan, and Uzbekistan. According to available USAID documents, none of the funding went to girls' education at the primary level.

Since 1995, funding for basic education in the Latin America and Caribbean (LAC) region has risen slowly but consistently, from \$21.4 million in 1996 to \$49.5 million in 2003. The largest recipients have been El Salvador, Guatemala, Haiti, Jamaica, Honduras, and Nicaragua. Haiti has received a total of \$60.5 million, nearly three times as much as Jamaica, at \$20.8 million.

While this section presented an overview of basic education funding for all activities, the next two sections examine the extent to which USAID's basic education activities

address gender issues in programming. For a breakdown of basic education funding by region and country through 2003, see Annex 1.

Patterns in Programming

A review of USAID documentation and research literature reveals that 15 countries have had USAID programs to improve education specifically for girls or for boys. The programs have included activities in all six of the intervention areas described in the earlier section on barriers to education. The largest number of interventions focused on making schools more attractive to girls, specifically through the implementation of girl-friendly policies, curricula, teachers, and facilities. The second largest number of interventions focused on support for government efforts, including institutional strengthening, advocacy, and social mobilization on behalf of girls. Interventions to improve the quality of instruction occurred with approximately the same frequency as those to support government efforts. Fewer interventions focused on increasing girls' enrollment by reducing costs to families. A breakdown of interventions by country and category of intervention is provided in Annex 2.

Regional patterns

This section details regional patterns in the content of basic education programs in the four regions, with a more specific look at interventions directed to help girls and/or boys.

Africa

In sub-Saharan Africa school enrollment rates are the lowest in the world, and gender disparities are the most glaring. USAID assistance in the region was characterized by systemic reforms that addressed multiple aspects of the education system. With substantial earmarked resources at its disposal and a requirement in the early 1990s to use non-project assistance (budgetary support) as well as project (technical and material) assistance, USAID missions aimed at influencing sector-wide policies and practices. The Education Sector Support model aimed at improving policy frameworks, increasing governments' budgetary allocations to the education sector, and building institutional capacity to manage and sustain reforms.

The strategic objectives (SOs) and intermediate results (IRs) for most African education projects show a pronounced accent on equitable access and participation in primary education, especially for girls. These objectives address social and economic barriers to girls' education, such as poverty, low demand, inadequate supply of schools, fear for girls' safety, early marriage, and pregnancy. Strategies to achieve the objectives varied from country to country (Tietjen 1997). Education projects in Malawi were designed specifically to improve girls' education, and activities designed to improve their participation were interwoven throughout the system reform effort. In countries with an "equity" objective (Ethiopia, Ghana, Guinea, Benin, Uganda, and Mali), girls' education constituted one or more distinct components within a project that was aimed at improving education for both boys and girls.

While USAID assistance in the early 1990s focused on improving access measures, especially for girls, a shift toward improving quality began in the latter part of the 1990s. For example, the Girls Attainment in Basic Education and Literacy project in Malawi funded fee-waivers for girls and a social mobilization campaign in its initial phase, with a second phase focusing on improving the quality, relevance, and efficiency of basic education.

The shift in focus toward quality appears to be accompanied by diminishing use of interventions specifically addressing gender inequalities and differences in learning styles between boys and girls. Among projects in Ghana, Namibia, Nigeria, Uganda, and South Africa, quality interventions are directed at improving the curricula, instructional practices, teacher training, and monitoring and evaluation systems. None of the interventions include specific activities to reduce inequality in the school system, such as the development of unbiased curricula that eliminate gender stereotyping, modules for ongoing in-service training of teachers to promote equitable treatment of boys and girls in the classroom, gender-sensitization of education officials, or classroom assessments to determine differentials in achievement by subject for boys and girls.

A discernable pattern since 1996 has been the addition of programming elements that focus on community-level activities to support gender equality in education. In addition to programs that address education sector reform, the construction of toilets, and curriculum development, programs include components to establish parents' associations, task forces, and female education advisory committees at the community level. In Ethiopia, for example, activities included the establishment of a community school grants program and a task force to support girls' education.

Other noteworthy trends include increased attention to school-based violence and the use of information and communication technologies (ICTs) in education.

The recently-funded Safe Schools Program looks at creating school environments that are safe for boys and girls. While the focus on school-based violence is a positive trend, the absence of gender considerations in ICT for education programming is a cause for concern in view of existing gender disparities in the use of ICTs. Examples of ICT and education activities include providing computers and internet access to all students in Namibia and in-service, refresher, and management trainings on ICTs for teachers in Uganda.

Asia and the Near East

Many countries in Asia, particularly south and west Asia and some Arab states, have large gender disparities in enrollment and retention rates. Until the early 2000s, USAID supported few basic education activities in the ANE region. One of USAID's first and largest programs featuring girls' education was in Pakistan, but the program ended in 1986. There were small activities in India, Nepal, and Morocco, but Egypt was the only other large recipient of education funding in ANE prior to 2001.

As U.S. anti-terrorism efforts reoriented foreign assistance priorities after September 11, 2001, new education initiatives were implemented in ANE. Activities were also

implemented in countries with high literacy rates and parity in enrollment, such as Indonesia, Jordan, and the Philippines.

Because many of the education programs in the ANE region are still nascent, there are no discernible patterns or trends except for a shift in emphasis from primary education to out-of-school youth. Programs are designed to respond to high unemployment rates, low school-to-work transition rates, and rising extremism and conflict in the region. Activities include developing new syllabi and life-skills training for youth in Jordan and Indonesia and counseling services for out-of-school youth, teacher training, and computer literacy in the Philippines. In Iraq and Afghanistan, education activities concentrate on rebuilding the educational infrastructure, developing new curricula, printing and distributing textbooks, and teacher training.

It is difficult to gauge the extent to which gender concerns are being analyzed and addressed, given the limited availability of information on education activities in ANE. The integration of gender concerns appears to be neglected in most SOs, with a few exceptions. The basic education projects in Egypt and Morocco are focused on girls' education, and have specific activities, IRs, and indicators targeted at increasing girls' participation rates. The education IR in India supports the promotion of girls' education, but other components of the same project, such as those that use technology to enhance learning, make no mention of gender issues.

Europe and Eurasia

USAID-supported basic education programs in Europe and Eurasia are limited in number and scope. As an outcome of strong support to schooling in countries of the former Soviet Union and its allies, adult literacy is fairly high and educational quality is not a severe a problem in comparison with other regions. But the collapse of the Soviet Union led to a decline in resources and attention to education, resulting in steadily declining enrollment rates and lack of significant progress over the last two decades.

USAID assistance in this region focuses on facilitating the transition to market-based economies, strengthening human capacity through training, national standardized tests, funding of civic education textbooks, establishing new American universities, and developing programs to train teachers in new instructional methods and democratic principles. In some of the Central Asian Republics, USAID's education funding has gone to promote the growth of small and medium enterprises through business and economics education.

In 2003, USAID initiated a Basic Education Sector Strengthening program to focus on primary education in Central Asia, specifically Kyrgyzstan, Uzbekistan, and Tajikistan. Activities included improving the quality of education by increasing parent and community involvement, strengthening institutional capacity of school systems, improving teaching methodology and curricula, and rehabilitating school infrastructure.

Most of the activities in the E&E region are targeted at youth, not primary-school children. Decentralization and expanding the use of information technologies are

important emphasis areas in the education sector. Education activities also form a small component of cross-cutting SOs and support strategies outside the education sector – in areas such as conflict prevention and micro-finance.

Gender issues are conspicuously absent from all the education-related SOs. While most of the transition countries have gained gender parity in primary, secondary, and tertiary enrollment and retention, gender inequities are apparent in the selection of fields of study and career specialization.

Latin America and the Caribbean

In LAC, with a few exceptions, universal access and gender parity in basic education have reportedly been achieved at the national level. National-level reports, however, mask disparities in education for girls and boys within many groups, including indigenous ethnic communities and poor and rural populations. Internal inefficiency and under-achievement in school systems are also major problems.

USAID's education reforms in the LAC region have centered on teacher training, improving language and math skills, bilingual education, integration of parents and communities into the education process, workplace-relevant secondary education, national education indicators, and strengthening educational management.

Mission activities vary within the region, in response to diverse problems. Activities in Honduras, Jamaica, and Brazil respond to the problems of poverty, child labor, drugs, teenage pregnancy, and HIV/AIDS and target out-of-school youth. They support alternative education strategies and activities in youth employment and provide economic opportunities through training in technology, life skills, and business skills.

With the exceptions of Guatemala, Peru, and Jamaica, none of the LAC programs specify gender-related activities. In Guatemala and Peru, education activities focus on promoting access to education services by identifying and removing constraints to girls' education. In Jamaica, USAID is addressing a gender gap that favors girls. In most countries in the region, rates of learning achievement appear to be higher for girls at both primary and secondary levels (UNESCO Institute for Statistics 2001). Boys have higher repetition rates and lower academic achievement levels than girls and in some countries a higher rate of absenteeism. In the Caribbean, girls are performing better than boys, start school earlier, attend school more regularly, and drop out of school less frequently (UNESCO 2003). Transition rates to secondary education also favor girls in several LAC countries. However, only the Jamaica program is aimed at reducing these disparities.

With the exception of the three countries cited above, USAID education programs in the region have not taken into consideration the gendered dimension of drop-out rates (pregnancy and motherhood in the case of girls and economic reasons in the case of boys). The LAC Bureau does not mention gender issues in its SOs or IRs, nor does the Partnership for Educational Revitalization in the Americas initiative. The narratives of

most annual reports from Nicaragua, Honduras, and Haiti do not mention gender-specific strategies or activities.

Introducing and Utilizing a Gender Programming Index

Overview of the Gender Programming Index

In an effort to provide a quantitative assessment of USAID’s contribution to gender-related education goals, EQUATE developed a gender programming index. Based on a review of existing reports for the 1996-2003 period, each education Strategic Objective and corresponding project is grouped into one of three categories: generic strategy, targeted strategy, and integrated strategy.

Table 1. Definitions of Categories in the Gender Index

Category	Definitions
Generic	Strategies with minimal or no evidence of gender analysis in the design, and no strategy or activities promoting gender issues
Targeted	Strategies with evidence of a gender analysis, and with a specific component or components targeted at girls or boys
Integrated	Strategies, analyses, and project designs that consider the differential effects of interventions on girls and boys and that explicitly address boys and/or girls throughout the process

Category determinations were made by examining whether projects included gender-related analyses, strategies, and activities and by examining the degree of compliance with the requirements on gender in the USAID Automated Directives System (ADS).³ The ADS outlines the major policy directives and procedural requirements for USAID activities.

Once basic education programs were grouped into the categories, the budgets for programs in each category were totaled, providing an indication of the extent to which basic education programs considered gender-related problems. The index shows the relative amounts of funding that have gone into various gender-related strategies and activities while highlighting countries that have dedicated funding towards gender issues.

Results of the Analysis

Table 2, the gender index, presents the countries whose basic education programs fall into each category and the total budget amounts for those programs for the period from

³ The ADS 200 series provides guidance on integrating gender into programming and policy. The series can be found at: <http://www.usaid.gov/policy/ads/200/>.

1996 to 2003. Overall, just under half of all education programming falls under the targeted category (48 percent), with slightly over half in the generic category (52 percent), and a negligible amount in the integrated category.

Table 2. Breakdown of USAID Basic Education Spending by Gender Category, 1996-2003

Gender Category	USAID Missions	Budget (Total = \$1.08 billion)
Generic Strategy	AFR: Ghana, Namibia, Nigeria, and South Africa ANE: Afghanistan and Iraq E&E: All countries with basic education activities LAC: Dominican Republic, El Salvador, Haiti, Honduras, and Nicaragua	\$557 million (52%)
Targeted Strategy	AFR: Benin, Ethiopia, Ghana, Guinea, Mali, Malawi, Uganda, and Zambia ANE: Egypt, India, Morocco, and Nepal LAC: Guatemala, Jamaica, and Peru	\$519 million (48%)
Integrated Strategy	Some missions have incorporated aspects of an integrated strategy, such as Pakistan and Malawi	N/A

Generic Strategy

In a total budget of just over \$1 billion for the eight-year period between 1996 and 2003, \$557 million was programmed for generic education activities. There are countries in all four regions with no gender considerations in their programming. Also included in the category of generic strategies are those activities with minimal gender analysis. Activities in Afghanistan⁴ and Iraq also fall in this category as these projects concentrated on infrastructure development and the printing and distribution of textbooks.

During this review, EQUATE found that some countries could be classified in more than one category, depending on the project and time period. Ghana is a noteworthy example; between 1996 and 2003, it fell under two categories – generic and targeted. The initial project did not address gender issues directly and, as such, could be categorized as having used a generic strategy. Between 2002 and 2004, however, the Strategies for Achieving Girls' Education project focused on increasing the involvement of girls, which is a targeted strategy.

Targeted Strategy

The other half of the agency's budget -- \$519 million—supports targeted activities, most of which focus on girls. During the period from 1996-2003, about half of USAID's budget was targeted at improving access to close the gender gap in education. Programs in

⁴ Since 2003 USAID/Afghanistan has undertaken projects specifically focused on girls and women such as the Literacy and Community Empowerment Program.

this category have specific SOs, IRs, indicators, and activities that promote girls' enrollment and learning outcomes or which address specific barriers to girls' education. Countries in this category include Malawi, Ethiopia, Guinea, Ghana, Guatemala, and Peru. The education SO for Ethiopia, for example, supports efforts to encourage a more female-friendly environment and sensitize community leaders and teachers to the importance of keeping girls in schools. Similarly, the education SO for Guinea seeks to increase enrollment for girls and rural children, and also takes into account gender considerations in curriculum development, instructional materials, teacher training, and classroom management.

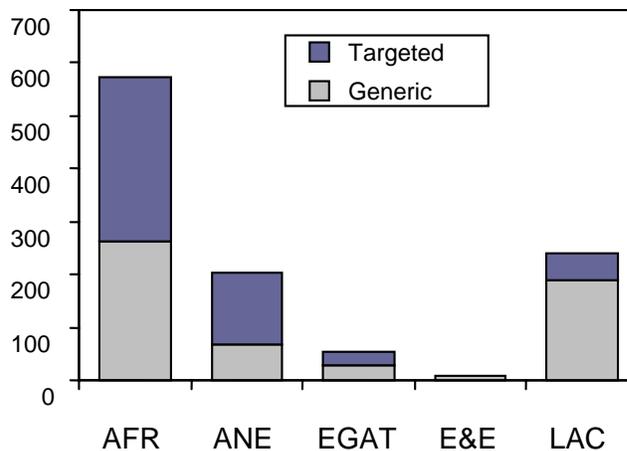
Integrated Strategy

Although a handful of past and current programs incorporated aspects of an integrated approach to gender concerns, this underrepresented category is illustrative of the agency's work in gender-related programming. The true essence of an integrated approach implies considering the relationship between the males and females in an effort to evaluate if and how power dynamics shape the education system at all levels. This approach has not been consistently applied to program design and activities.⁵

Regional Trends

Figure 3 provides a break down of the budget by region vis-à-vis gender emphasis.

Figure 3. USAID Basic Education Budget by Region and Strategy, 1996-2003



Source: USAID R4s and Annual Reports / USAID Budget Office

Sub-Saharan Africa takes the lead in promoting targeted approaches with almost 50 percent of its budget (almost \$297 million) from 1996-2003 going towards promoting girls' education. However, its share of generic programs is also substantial at \$193

⁵ The Safe Schools Program, which is implementing activities in Ghana and Malawi, utilizes an integrated approach to addressing school-related gender-based violence. The program was awarded in 2003 and thus was outside the scope of the budget analysis conducted for this report.

million dollars. ANE’s budget for programs with targeted activities was \$136 million out of a total basic education budget of \$200 million. The bulk of targeted education funding in ANE was the result of activities in Egypt and Morocco. USAID’s basic education activities in the E&E region comprised a small part of its budget, and none of its basic education SOs addressed gender issues. The LAC budget for generic activities was \$189 million, compared to \$49 million for targeted activities. Programs in Guatemala and Peru targeted girls, while programs in Jamaica targeted boys.

Summary

The balanced distribution of education activities across the generic and targeted categories between 1996 and 2003 is a marked shift from the five years prior. Comparing the figures from the EQUATE analysis with an analysis conducted by Rawley in 1997,⁶ the shift in investment away from targeted approaches is evident. As reflected in Table 3 below, during the period between 1990 and 1995, 72 percent of authorized expenditures for basic education were considered targeted⁷ and only 28 percent were labeled generic. In contrast, the breakdown is essentially even in the period between 1996 and 2003. As a long-term USAID program officer noted, when the emphasis shifts from access to quality, “the focus on girls is lost.”

Table 3. Education Budgets by Gender Strategies, 1990-95 and 1996-2003

Gender Category	1990-1995 Breakdown	1996-2003 Breakdown
Generic	28%	52%
Targeted	72%	48%

In the period from 1996-2003, the largest share of programs in the targeted category focused on girls only and seemingly without consideration for either the particular needs of boys or the role that boys and men play in problems faced by girls and women. As one USAID field officer commented, “so far the emphasis has been on girls, but we need to make sure we talk about girls and boys.” The analysis of SOs and IRs reveals that only a minor part of the targeted activities consider gender differences in education.

The results of the gender programming index are confirmed by the experiences of USAID officers who are often unclear about how to address gender equality in education programming. One headquarters-based education officer, for example, observed that, “[p]eople are [not] sure what to do with gender.” Another headquarters-based education officer observed that officers think of gender, “as advocacy rather than integrated into programming.” The lack of clarity in how to address gender equality issues in education is reflected in the design of the projects reviewed as part of this analysis. Addressing girls’ access to education was a more straightforward premise, easier for education officers to understand and address.

⁶ For an analysis of USAID spending on basic education from 1990-1995, see *Including Girls in Basic Education: Chronology and Evolution of USAID Approaches*, Christina Rawley, Washington, DC: ABEL2, 1997.

⁷ Although Rawley’s report utilizes the term differential, the meaning corresponds to EQUATE’s targeted category.

Female-targeted strategies made sense as long as the focus was on equitable access to education. However, with educational quality increasingly being recognized as a central issue, an integrated strategy, which considers the cultural dimensions of the classroom, school, and community, becomes crucial. To achieve this, education officers will, “need practical tools ... and technical assistance to know how to use them.”

CONCLUSION

EQUATE’s review of development literature and USAID funding allocations and programming trends from 1996 to 2003 reveals a historical focus on access issues with a particular attention to girls’ participation in formal schooling. However, the emerging focus on quality issues in education will require an examination of how questions of gender equality will be addressed through new programming strategies. To date, quality interventions have largely been gender neutral and USAID has done little to examine how gender norms impact boys’ and girls’ education. Ensuring the meaningful participation in education for both boys and girls requires attention to the ways that the roles and relationships between males and females shape the education system and educational experience for both sexes. To ensure that males and females are fully engaged in and benefiting from basic education activities, a dedicated commitment to research and programming that examines the impact of quality-oriented interventions on boys and girls is needed.

While USAID’s commitment to increasing girls’ access to education has been impressive, the gender programming index clearly demonstrates that USAID falls short in regards to considering the complexity of boys’ and girls’ educational needs. As trends in education programming shift to include a focus on quality, greater community involvement, and cross-sectoral issues, USAID has a unique opportunity to renew its commitment to gender equality issues in education. The adoption of integrated strategies to basic education programming will help USAID realize its mission of ensuring that all boys and girls have access to and benefit from a relevant, high quality education.

To achieve this, USAID officers must have a clear and consistent understanding of gender equality issues in education. Yet, this analysis revealed a lack of understanding of common gender terms and confusion about how to achieve gender equality on the part of USAID education officers. Officers requested additional tools and information to help them ensure that quality interventions are not gender blind. They requested tools to help them make the decisions necessary to ensure that education interventions produce the maximum results for all children. By highlighting the efforts and gaps to date, this report provides an excellent foundation for this effort. The analysis presented here will guide the development of a practical framework for addressing gender equality in education.

ANNEX 1 – USAID Basic Education Budgets

Africa (US\$ thousands)											
Office	Initial year	Through 1995	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL
Africa Regional	2001							6,585	18,192	18,879	43,656
Angola	1996		525							0	525
Benin	1991	33,061	6,400	6,335	7,500	7,000	5,733	5,720	7,000	7,460	86,209
Botswana	1986	8,883									8,883
Congo	2002								2,000		2,000
Djibouti	2003									10,000	10,000
Eritrea	2003									600	600
Ethiopia	1994	11,000	8,430	9,500	12,060	12,200	13,149	11,622	12,000	10,735	100,696
Ghana	1990	34,514	8,721	7,975	8,800	7,695	5,370	5,857	6,700	10,308	95,940
Guinea	1990	29,673		3,448	5,000	4,336	5,005	4,994	5,700	7,965	66,121
Kenya	1999					2,000				2,000	4,000
Lesotho	1991	15,381									15,381
Madagascar	2003									500	500
Malawi	1991	10,919	5,760	4,627	4,300	4,864	3,556	4,011	5,000	2,501	45,538
Mali	1989	23,588	3,432	5,606	6,350	5,340	5,279	5,266	7,000	7,373	69,234
Namibia	1991	18,676	1,630	1,100	2,800	2,000	3,002	2,898	2,684	1,350	36,140
Nigeria	2000						2,000	3,163	3,170	4,840	13,173
Rwanda	2000						800				800
Senegal	2002								3,000	3,736	6,736
South Africa	1986	35,028	10,499	19,000	9,000	5,300	3,988	3,000	3,400	4,090	93,305
Sudan	2002								3,000	3,500	6,500
Swaziland	1989	5,224									5,224
Tanzania	2003									2,000	2,000
Uganda	1992	3,348	8,600	9,700	9,140	8,577	8,818	8,879	7,854	8,460	73,376
Zambia	1998				1,000	1,200	728	4,965	4,700	6,501	19,094
Development Planning	-		293	1,996	512						2,801
Sustainable Development	-		2,874	2,747	3,103	7,770	4,703				21,197
Regional Total		229,295	57,164	72,034	69,565	68,282	62,131	66,960	91,400	112,798	829,629

Asia and the Near East (US\$ thousands)											
Office	Initial year	Through 1995	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL
Afghanistan	1986	48,651								8,000	56,651
ANE Regional	1997			463		100	250	272	1,032	2,184	4,301
Bangladesh	2001							1,500	2,500	2,350	6,350
Burma	1999					500				600	1,100
Cambodia	1995	3,500	1,717	8,000						4,500	17,717
East Asia Regional	2001							160		95	255
Egypt	1981	183,836	16,500	10,130		10,000	5,400	12,580	12,350	31,000	281,796
India	1996		324		400		1,250	700	2,240	4,008	8,922
Indonesia	2002								3,000	2,000	5,000
Jordan	2003								0	3,700	3,700
Nepal	1994	1,200									
Lebanon	1985	22,991						650	650		24,291
Morocco	1996		2,996	1,500	2,300	1,526	1,500	1,488	1,428	1,528	14,266
Pakistan	1989	44,005							15,000	19,028	78,033
Philippines	2003									2,000	2,000
Sri Lanka	1998				400						400
Yemen	1987	4,542						2,994	3,300	5,000	15,836
Regional Total		308,725	21,537	20,093	3,100	12,126	8,400	20,344	41,500	85,993	521,818

Europe & Eurasia (US\$ thousands)											
Office	Initial year	Through 1995	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL
Armenia	1996		1,370						750	1,000	3,120
Azerbaijan	1996		525								525
Eastern Europe Regional	2002								115		115
Eurasia Regional	2002								75		75
Europe Regional	2001							317		167	484
Georgia	1996		413								413
Kyrgyz Republic	2003									669	669
Lithuania	1996		187								187
Macedonia	2001							250	4,005	280	4,535
Slovakia	1996		315	465							780
Tajikistan	2003									1,000	1,000
Turkmenistan	2003									125	125
Uzbekistan	2003									1,200	1,200
Regional Total			2,810	465				567	4,945	4,441	13,228

Latin America and the Caribbean (US\$ thousands)											
Office	Initial year	Through 1995	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL
Bolivia	1988	5,798	242								6,040
Brazil	2000						1,250				1,250
Dominican Republic	1990	3,907						500	800	2,389	7,596
El Salvador	1990	21,046	5,717	4,350	3,970	3,300	3,350	7,788	1,675	3,693	54,889
Guatemala	1989	6,132	2,500	2,790	3,250	4,432	2,785	2,529	2,750	4,550	31,718
Haiti	1986	19,238	4,641	10,277	5,480	3,995	6,290	4,057	2,500	4,000	60,478
Honduras	1986	22,139	3,009	1,625	2,400	2,500	2,500	3,294	3,500	7,000	47,967
Jamaica	1990	5,042	335	840	350	1,526	1,532	2,794	3,678	4,678	20,775
LAC Regional	-		1,710	812	6,885	6,450	5,050	4,290	20,179	13,640	59,016
Nicaragua	1992	10,221	2,752	1,500	3,752	3,000	3,100	1,990	2,500	6,200	35,015
Peru	1996		500	364		1,050	500	1,507	1,325	3,384	8,630
Regional Total		93,523	21,406	22,558	26,086	26,253	26,357	28,749	38,907	49,534	333,373

Annex 2 – Interventions to Improve Girls’ Education⁸

Africa (AFR)							
Country	Initial year	Interventions					
		Reduce costs	Make schools accessible	Improve treatment of girls/boys	Improve quality of instruction	Strengthen support for national education efforts	Address social and cultural context
Benin	1991	<ul style="list-style-type: none"> •Fee waivers for rural girls 		<ul style="list-style-type: none"> •New toilet facilities 	<ul style="list-style-type: none"> •Curriculum development •Textbook production •Teacher training 	<ul style="list-style-type: none"> •Decentralization •National network and parents’ associations for promoting girls’ education 	
Ethiopia	1994			<ul style="list-style-type: none"> •Recruit and train female teacher trainees •Community school grants program •School leadership program to establish female education 		<ul style="list-style-type: none"> •Improving education sector policy and financing and decentralized administration 	

⁸ This table includes gender-neutral strategies, such as strengthening the education system and training teachers, as well as activities specifically aimed at improving education for either girls or boys.

Africa (AFR)							
Country	Initial year	Interventions					
		Reduce costs	Make schools accessible	Improve treatment of girls/boys	Improve quality of instruction	Strengthen support for national education efforts	Address social and cultural context
				advisory committees			
Ghana	1990		•Equity policy and pilot projects		•Transportation and housing for teachers •Improve quality of instruction		
Guinea	1990		•Equity committee/gender unit •Prizes and incentives	•Schoolgirl pregnancy policy •Female school director policy	•Interactive radio instruction	•National Girls' Education Working Group •Budget for textbooks •Strengthen system •National and community advocacy campaign, parent teacher associations, and NGOs	

Africa (AFR)							
Country	Initial year	Interventions					
		Reduce costs	Make schools accessible	Improve treatment of girls/boys	Improve quality of instruction	Strengthen support for national education efforts	Address social and cultural context
Malawi	1991	<ul style="list-style-type: none"> •Elimination of school fees and uniforms •Fee waivers for non-repeating girls 	<ul style="list-style-type: none"> •Build new schools 	<ul style="list-style-type: none"> •Gender-appropriate curriculum and materials •Schoolgirl pregnancy policy 	<ul style="list-style-type: none"> •Teacher training program 	<ul style="list-style-type: none"> •Improved planning capacity •Social mobilization campaign •Community-school self-help projects 	
Mali	1989		<ul style="list-style-type: none"> •National and regional gender units •Equal intake policy for grades 1 and 2 	<ul style="list-style-type: none"> •Community schools •School incentive grants •Teachers trained in gender issues 	<ul style="list-style-type: none"> •Relevant curriculum •Teacher training 	<ul style="list-style-type: none"> •Social marketing campaign 	
Uganda	1992			<ul style="list-style-type: none"> •School incentive grants •New toilet facilities 	<ul style="list-style-type: none"> •Teacher-training system •Raise teachers' salaries 		

Asia Near East (ANE)							
Country	Initial year	Interventions					
		Reduce costs	Make schools accessible	Improve treatment of girls/boys	Improve quality of instruction	Strengthen support to government	Address social and cultural context
Egypt	1986	•Scholarships for girls	•Build and rehab schools	•Community schools •Female teachers from community •Flexible schedule	•Teacher training •Instructional commodities	•Improved materials development process	
India	1996			•Support UNICEF schools			•Literacy/ empowerment of women
Morocco	1996			•Community schools		•Advocacy campaign	
Nepal	1994						•Literacy/ empowerment of women
Pakistan	1989		•Build and rehab schools for girls •Village education committees	•Single-sex schools •Recruit and train female teachers •Gender-balanced materials	•Improved curricula, materials, and instruction	•Strengthen system •Community support for girls' schools •Improved materials development process	

Latin America and Caribbean (LAC)							
Country	Initial year	Interventions					
		Reduce costs	Make schools accessible	Improve treatment of girls/boys	Improve quality of instruction	Strengthen support to government	Address social and cultural context
Guatemala	1989	<ul style="list-style-type: none"> •Scholarships for rural girls 	<ul style="list-style-type: none"> •Parent committees •National commission •Gender office •Pilot programs 	<ul style="list-style-type: none"> •Female teachers as role models •Girl-friendly policies •Community management and mentoring 	<ul style="list-style-type: none"> •Active learning classrooms •Bilingual education •Relevant curriculum and materials 	<ul style="list-style-type: none"> •Policy research •National and community-level advocacy campaign •Strengthen system 	
Jamaica				<ul style="list-style-type: none"> •Address the poor performance of boys in school 			
Peru	1996		<ul style="list-style-type: none"> •Increase girls' access 				

Sources: USAID Activity Data Sheets, Congressional Budget Justifications, and annual reports; O'Gara, et al. 1999; Tietjen 1997; Kane and Yoder 1998; and Rawley 1997.

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