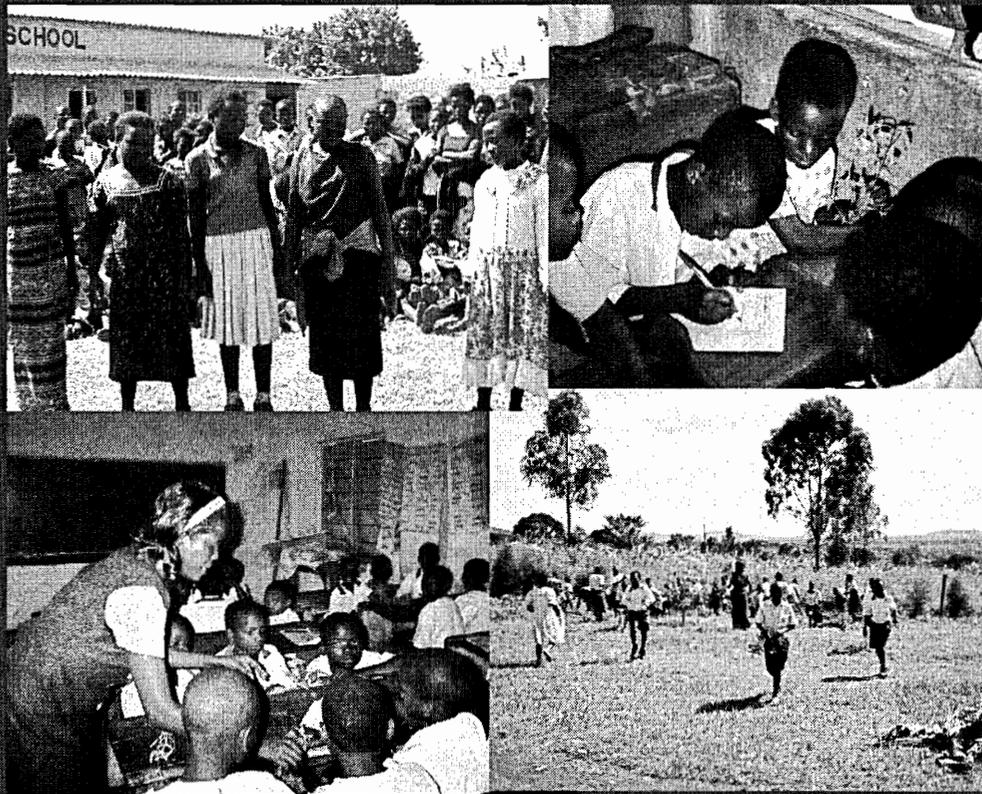


EQUATE

Achieving Equality in Education

SKILLS, TOOLS AND STRATEGIES FOR ACHIEVING GENDER EQUALITY IN EDUCATION PROGRAMMING

November 17th & 18th, 2005



USAID Africa Bureau Education Team Workshop: Skills, Tools and Strategies for Achieving Gender Equality in Education Programming

Goals and Objectives

Goals

To understand the relationship between gender equality and education and its implications for quality education.

To acquire practical "how-to" skills to integrate gender considerations into USAID education programs and projects and better respond to the particular needs of boys and girls and vulnerable children.

Objectives

- ✓ Identify entry points for integrating gender throughout the project cycle
- ✓ Become familiar with the Gender Equality Framework and understand the concepts of gender parity, equity and equality
- ✓ Practice using gender analysis tools for integrating gender concerns into strategy statements and education projects
- ✓ Understand how to better support the field in integrating gender into education programs
- ✓ Use Participatory Learning and Action methodologies for assessing, monitoring and evaluating education projects
- ✓ Become familiar with the types of tools, resources, and support available to USAID education staff both in HQ and the field

**USAID Africa Bureau Education Team Workshop:
Skills, Tools and Strategies for Achieving Gender Equality in
Education Programming**

November 17 - 18, 2005

Workshop Agenda

Day 1: November 17

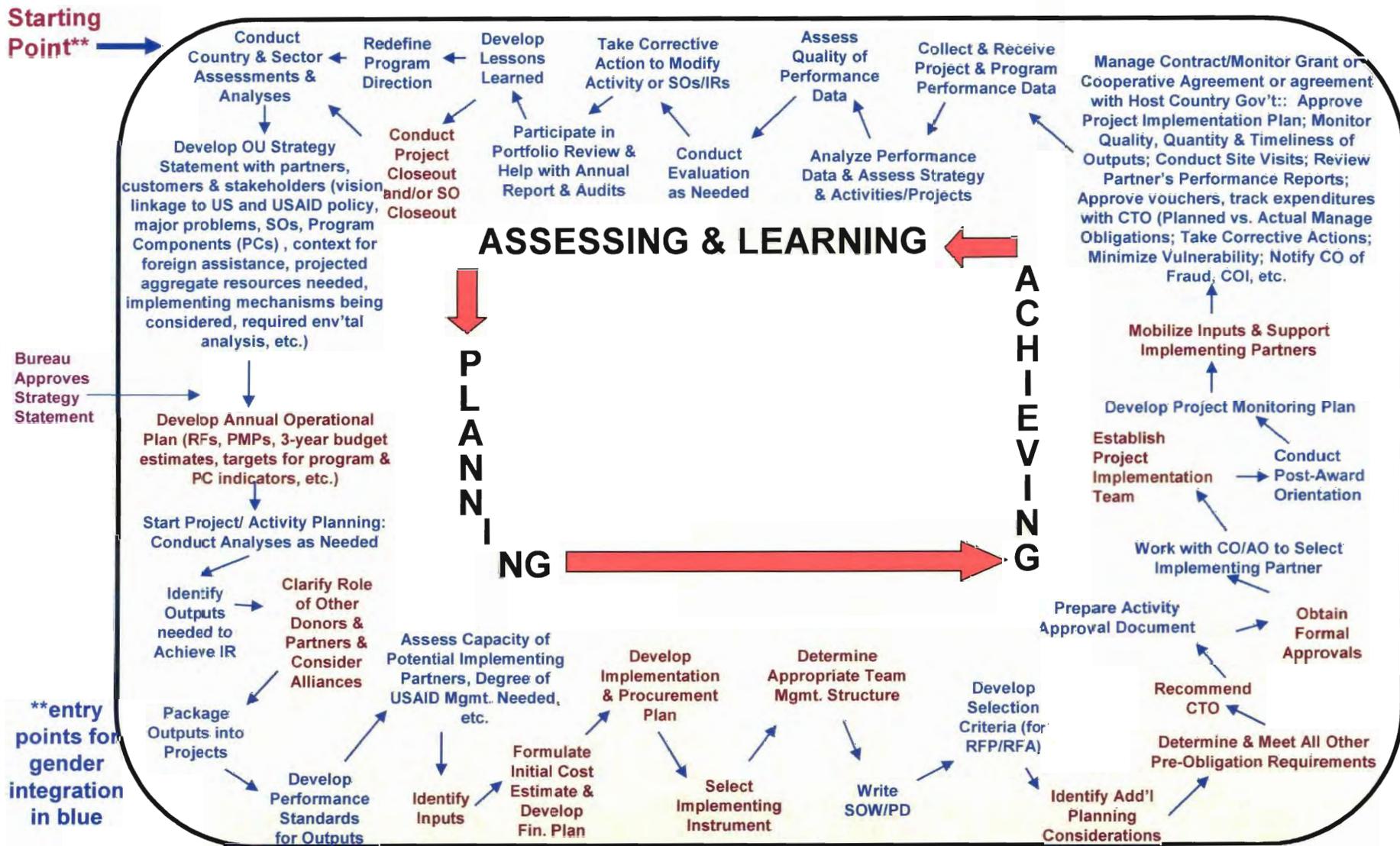
8:45am - 9:00am	<i>Coffee</i>
9:00am - 9:30am	Act Like a Man! Act Like a Woman!
9:30am - 10:00am	Welcome/Learning Objectives/Agenda/ Workshop Methodology
10:00am - 10:30am	Gender and the USAID Project Roadmap
10:30am - 10:45am	<i>Break</i>
10:45am - 12:00pm	If We Had True "Gender Equality" in Education, What Would It Look Like? - Brainstorm and Discussion
12:00pm - 12:30pm	A New Way of Looking at Gender in Education: Model for Discussion
12:30pm - 12:45pm	Lessons From the Field: Ethiopia
12:45pm - 1:45pm	<i>Lunch</i>
1:45pm - 3:15pm	Analyzing Education Projects Through a New Lens - Case Study Review and Discussion
3:15pm - 3:30pm	<i>Break</i>
3:30pm - 5:15pm	Participatory Assessments and Participatory Monitoring and Evaluation - Video and Group Discussion
5:15pm - 5:30pm	Evaluation and Close of Day 1

Day 2: November 18

8:30am - 8:45am	<i>Coffee</i>
8:45am - 9:00am	Welcome/Recap of Day 1/Day 2 Objectives
9:00am - 10:00am	Continuum of Approaches for Integrating Gender into Projects - Group Activity
10:00am - 10:15am	Putting it all Together - An Expanded Model of Gender Equality in Education
10:15am - 10:20am	<i>Break</i>
10:20am - 12:00pm	Considering the Gender Needs of Orphans and Vulnerable Children (OVCs) - Video and Group Activity
12:00pm - 12:20pm	Lessons from the Field: Zambia
12:20pm - 1:00pm	Final Evaluation and Close (with working lunch)



Roadmap for Considering Gender in Program & Project Management



Summary of Gender References in ADS Chapter 200 and 300 Series (including excerpts from draft revision of ADS 201 as of 9/6/05)

201.3.4.2 Operational Plans

Operating Units' Operational Plans are not documents as such, but constructs that provide the rationale for implementing the Strategy Statements. The Operational Plans are part of their Annual Reports, which provide in the Annual Report submissions the documentation, which describes how the strategy statements will be implemented. The Annual Report Guidance contains the necessary instructions for completing the documentation of operational plans.

Operational Plans. Operational Plans supplement Strategy Statements to:

- Explain how the program takes into account special issues, such as gender, as specified in the Annual Report guidance;

201.3.5.3 Statement of Strategic Objective

Effective Date: 01/31/2003

As a general rule, the Strategy Statement of the Operating Unit summarizes the Strategic Objective content, rationale, and key budget and timing parameter. The detailed description, justification, and budget and implementation plan is in the Statement of Strategic Objective with the Operating Unit. The content of Strategic Objectives follows below.

MANDATORY. At the time of approval, a Strategic Objective must do the following:

- Incorporate the findings of technical analyses (gender, environment and conflict mitigation, as appropriate) and incorporate actions that will overcome any identified, significant obstacles to achieving desired results under the SO.

201.3.7.4 Overview of Activity Planning Requirements

Effective Date: 01/31/2003

Operating Units must conduct adequate activity planning. This section summarizes the major requirements for adequate activity planning.

Figure 201E, Thirteen Steps in Activity Planning

No.	Description	Obligating Scenario A	Obligating Scenario B
1	Develop an Operationally Useful Results Framework (see 201.3.7.5)	✓	✓
2	Conduct Analyses as Needed (see 201.3.7.6)	✓(a)	✓(a)
3	Specify the Role of Partners (see 201.3.7.7)	✓	✓
4	Assess Capacity of Potential Implementing Partners (see 201.3.7.8)	✓	✓
5	Formulate Initial Cost Estimate and Develop Financial Plan (see 201.3.7.9)	✓(b)	✓(b)
6	Develop implementation planning (see 201.3.7.10)	✓(b)	✓(b)
7	Select Implementing Instrument: Government-to-Government Agreements (see 201.3.7.11)	✓	
8	Select Implementing Instrument: Direct USAID (see 201.3.7.12)		✓
9	Determine Appropriate Team Management Structure (see 201.3.7.12)	✓	✓
10	Identify Additional Planning Considerations (see 201.3.7.13)	✓	N/A
11	Determine and Meet Remaining Pre-Obligation Requirements (see 201.3.7.14)	N/A	✓1
12	Prepare Activity Approval Document (AAD) (see 201.3.7.15)	✓(b)	✓(b)
13	Obtain Formal Approvals/Approve Activity (see 201.3.7.16)	✓(b)	✓(b)
(a)	Only the gender analysis portion of this step is mandatory.		
(b)	The step is mandatory.		
(c)	The step is mandatory for all outstanding pre-obligation requirements.		

201.3.7.6 Activity Planning Step 2: Conduct Activity-level Analyses as Needed

Much of the analytical work that was formerly required in preparing the operating unit's strategic plan is now part of the Operational Plan. When designing activities, Operating Units should review past Agency and development partner experience, including Agency policy documents, alternative development approaches, best practices, evaluations, and other development literature. See a comprehensive list of resources in [ADS 200.4](#), or consult the Development Experience Clearinghouse (see [ADS 203.3.12](#)) for Agency experience.

- **Gender Analysis. MANDATORY.** Upon approval of the Operational Plan, activity design must address gender issues in a manner consistent with the gender-analysis findings prepared for Regional Strategic Frameworks and Operating Unit Strategy Statements, such as actions identified for overcoming potential obstacles to SO achievement. These findings can inform ways for the activity to address gender.

Before approving an activity, Operating Units should ensure that those who will implement it are capable of addressing these gender concerns (see [201.3.8](#) on planning and gender). For contracts and grants/cooperative agreements that are issued following a competitive process, solicitation documents should spell out USAID's expectations regarding gender expertise and capacity and the need for offerors to propose meaningful approaches to address identified gender issues, as well as place appropriate emphasis on gender-related elements of technical evaluation criteria. The following steps must be completed to address this requirement:

(1) For each activity subject to approval, the Operating Unit must, in one page or less, outline the most significant gender issues that need to be considered during activity implementation and answer the following:

(a) Are women and men involved or affected differently by the context or work to be undertaken?

(b) If so, would this difference be an important factor in managing for sustainable program impact?

The statement must describe how these concerns will be addressed in any competitive solicitations financed under the activity, such as Requests for Proposal (RFPs) and Requests for Assistance (RFAs) or Annual Program Statements (APS). Procurements for goods and commodities are excluded from this requirement. USAID must include the text of this gender statement in the Activity Approval Document (see 201.3.7.16).

(2) If the Operating Unit determines that there are no significant gender issues, it must provide a brief rationale to that effect in place of the gender statement in the Activity Approval Document.

(3) The Approving Official for the activity will ensure that the gender statement adequately responds to item #1 in this list. In cases having no gender statement (see item #2), the Approving Official must ensure, as part of activity approval, that the rationale is adequate.

(4) Before issuing or approving an RFP, RFA, or APS, the Contract or Agreement Officer will

(a) Confirm that either the gender statement is incorporated into the resulting RFA, RFP, or APS requirements or that the rationale (item #2, above) has been completed as part of activity approval; and

(b) Work with the Operating Unit or SO Team so that the Statement of Work or Program Description in the technical evaluation criteria appropriately reflects the relative significance of gender technical capacity.

For technical assistance and additional guidance on integrating findings of gender analysis into activities, consult the Operating Unit or Bureau gender specialist or the Office for Women in Development (WID) in the EGAT Bureau.

201.3.7.16 Activity Planning Step 12: Prepare Activity Approval Document (AAD)

MANDATORY. Operating Units must document all program-funded activities in writing through an acceptable Activity Approval Document. The Activity Approval Document certifies that appropriate planning for the activity has been completed. Program-funded activities may cover a range of outputs and encompass multiple A&A instruments.

At a minimum, Activity Approval Documents must

- Outline the most significant gender issues that USAID needs to consider during activity implementation and describe what outcomes are expected by addressing these issues or, if the Operating Unit determines that there are no significant gender issues, provide a brief rationale to that effect.

201.3.8 Planning and Gender Considerations

Country-level Operating Unit strategies must reflect attention to gender concerns. Unlike other sectoral planning issues, gender is not a separate topic to be addressed in isolation. Instead, USAID's gender-mainstreaming approach requires the application of appropriate gender assessment to the range of technical issues being considered in the development of a given Regional Strategic Framework, Strategy Statement, or Operational Plan. Operating Units must ensure that an understanding of gender issues is integrated into the design of program activities. (See [201.3.7.6](#), Gender Analysis)

Operating units must do gender analysis in the development of their strategy statements to ensure that gender considerations fall within the context of their operations and that their programs have an integrated understanding of gender concerns across SOs. The analysis must then be incorporated into the design of program implementation activities. (See [201.3.7.6](#), Gender Analysis)

Bureaus have the task of articulating the substantive concerns of gender integration, of helping develop operating-unit capacity to understand those concerns, and of ensuring that Operating Units adequately address these concerns in their program implementation.

Analytical work performed in the planning and development of the Results Framework must address at least two questions: 1) How will gender relations affect the achievement of sustainable results? 2) How will proposed results affect the relative status of men and women? Addressing these questions involves taking into account not only the different roles of men and women, but also the relationship and balance between them and the institutional structures that support them. For technical assistance and additional guidance, consult the Operating Unit or Bureau gender specialist or the Office for Women in Development (WID) in the EGAT Bureau.

See the following sections for the integration of gender considerations into the various levels of strategic planning.

- 201.3.2.3.2** Sector Planning
- 201.3.4.2** Operational Planning
- 201.3.5.1** Strategic Objective: Planning Levels
- 201.3.5.3** Statement of Strategic Objective
- 201.3.7.4** Figure 201E: Thirteen Steps in Activity Planning
- 201.3.7.6** Activity Planning Step 2: Mandatory Gender Analysis
- 201.3.7.14** Activity Planning Step 10: Review of Pre-Obligation Requirements
- 201.3.7.15** Activity Planning Step 11: Activity Approval Document

203.3.3.1 Contents of a Complete PMP

Effective Date: 01/31/2003

MANDATORY. To be considered complete, a PMP must define at least one performance indicator that will be used to measure progress towards the Strategic Objective, and at least one performance indicator to measure progress towards each Intermediate Result in the Results Framework. Each of those performance indicators must include baseline levels, and targets to be achieved over the life of the SO.

b. State the set of performance indicators that the Operating Unit will use to assess progress towards the SO over its life. Performance indicators should be disaggregated by **gender** to the maximum extent possible.

203.3.4.3 Reflecting Gender Considerations in Performance Indicators

Effective Date: 01/31/2003

...Because disaggregating performance data by **gender** is not always feasible or cost effective, the following requirement ensures due consideration in assessing the relationship between **gender** and development efforts:

MANDATORY. Performance management systems and evaluations at the SO and IR levels must include **gender**-sensitive indicators and sex-disaggregated data when the technical analyses supporting the Strategic Objective, the Intermediate Results, or the activities to be undertaken under the SO demonstrate that

- The activities or their anticipated results involve or affect women and men differently; and
- If so, this difference would be an important factor in managing for sustainable program impact.

If the people targeted by the activity cannot be easily identified (such as people who attend mass meetings, people who buy from social marketing program vendors, people affected by economic reform), it may be too difficult to track and report sex-disaggregated data. In these cases, Operating Units should use performance indicators that may assess **gender** impact indirectly.

When **gender** technical expertise is not present in an Operating Unit, technical assistance is available from the Office of Women in Development in the Bureau for Economic Growth, Agriculture, and Trade (EGAT).

302.5.14 INCORPORATING GENDER CONSIDERATIONS INTO EVALUATION CRITERIA FOR COMPETITIVE SOLICITATIONS

To ensure that competitive contract solicitations comply with the policy contained in the bullet item "**Gender**" in ADS 201.3.6.3 part a. (See ADS 201.3.6.3), Contracting Officers must

- a) Incorporate into the request for proposal (RFP) the statement outlining **gender** issues or confirm that the Strategic Objective Team (SOT) completed the rationale for not specifying **gender** issues as part of the activity approval; AND
- b) Include in the RFP an appropriately weighted technical evaluation criterion addressing the **gender** considerations specified in the statement, if applicable.

303.5.5b EVALUATION CRITERIA

...In addition, USAID policy requires that **gender** issues be addressed as appropriate in all USAID-funded activities (See Mandatory Reference, USAID Policy Paper, "Women in Development," dated October 1982). If the SO/RP team decides that **gender** issues will not be incorporated, they must document their decision in accordance with the requirements in E303.5.5b, paragraph 4 (E303.5.5b, paragraph 4).

For assistance and additional information, please contact Julie Hanson Swanson, Education Program Specialist, EGAT/WID at 202-712-1687 (juswanson@usaid.gov).



Skills, Tools and Strategies for Achieving Gender Equality in Education Programming

Africa Bureau Education Team Workshop



Skills Tools and Strategies for Achieving Gender Equality in Education Programming
November 17 – 18, 2005



What is Gender?

Gender

- ✓ Socially constructed
- ✓ Learned
- ✓ Dynamic -- changes over time
- ✓ Multi-faceted -- differs within and between cultures

Sex

- ✓ Biologically determined
- ✓ Universal
- ✓ Unchanging



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Workshop Objectives

- Identify entry points for integrating gender considerations throughout the USAID project cycle;
- Become familiar with the Gender Equality Framework and understand the concepts of gender parity, equity and equality;
- Practice using gender analysis tools for integrating gender concerns into strategy statements and education projects
- Understand how to better support the field in integrating gender into education programs
- Use Participatory Learning and Action methodologies for assessing, monitoring and evaluating education projects; and
- Learn what tools, support and resources are available to USAID education staff.



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Behavior & Attitudes

- Self-critical awareness
- Seeking diversity
- Flexibility
- Offsetting biases
- Respect for local knowledge and capabilities
- Learning on multiple levels

Sharing

- Discussion/dialogue on multiple levels
- PLA facilitators sharing information
- Participants from USAID and other organizations sharing information and experiences with each other

Workshop Methodology- Participatory Learning and Action

Methods

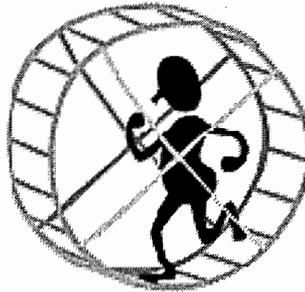
- VIIPP Cards
- Multi-Voting/Ranking
- Focus groups



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Gender Integration and the USAID Project Cycle



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Gender Requirements in the ADS

- Country-level Operating Unit strategies must reflect attention to gender concerns...USAID's gender-mainstreaming approach requires the application of appropriate gender assessment to the range of technical issues being considered in the development of a given Regional Strategic Framework, Strategy Statement, or Operational Plan.
- Operating Units must ensure that an understanding of gender issues is integrated into the design of program activities.



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Gender and the ADS: Two Fundamental Questions

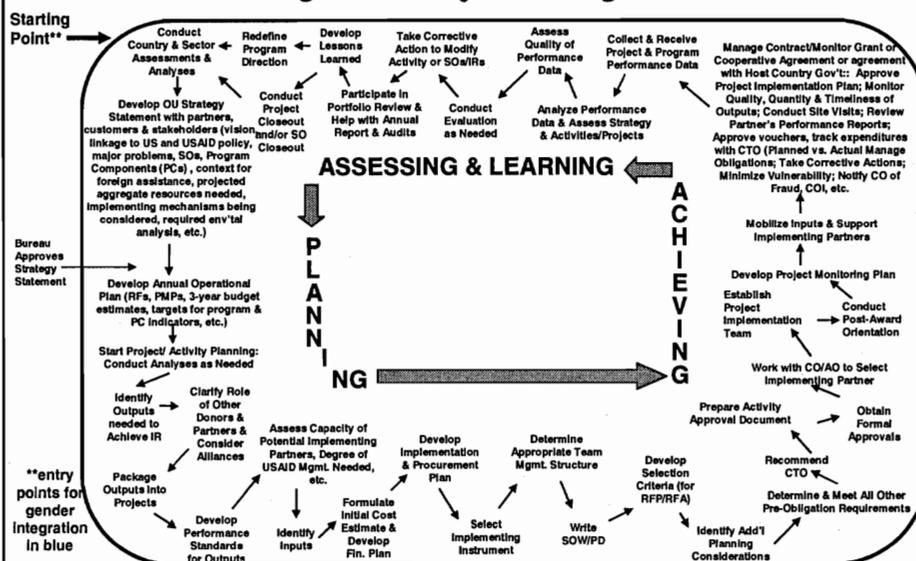
- How will gender relations affect the achievement of sustainable results?
- How will proposed results affect the relative status of men and women/boys and girls?



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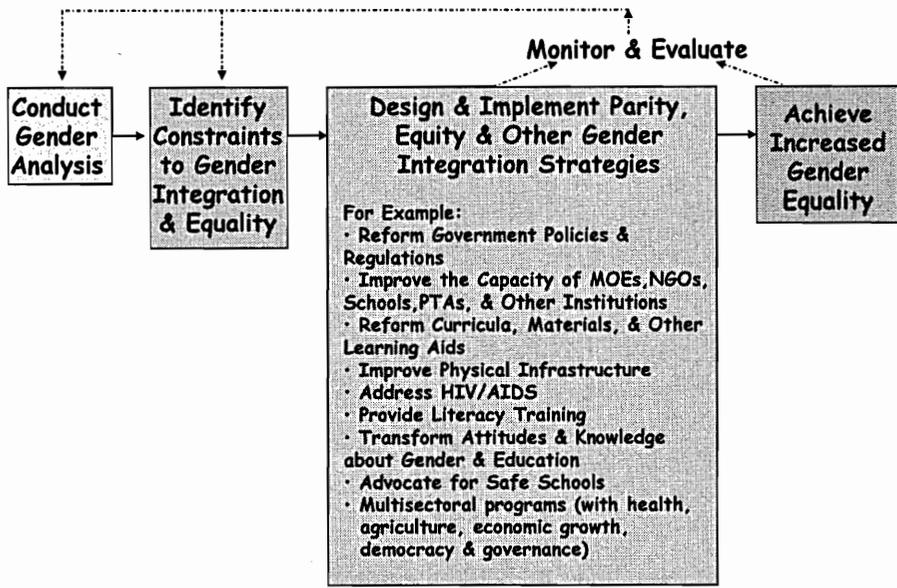
Roadmap for Considering Gender in Program & Project Management



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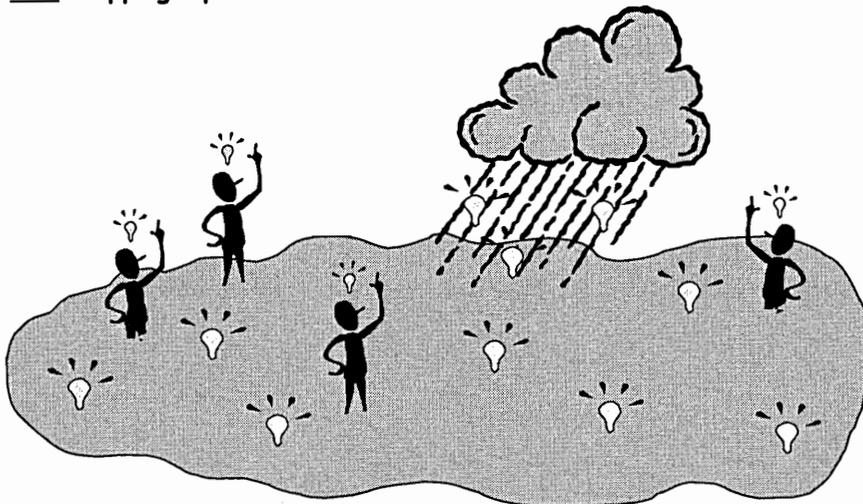
Achieving Gender Integration & Equality is a Systematic, Strategic Process...



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Brainstorming — A Tool for Obtaining a Flood of Ideas...and Not Mopping Up Until the Flood Subsides!



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When "Brainstorming"...

- We temporarily abandon our conventional, calculated, logical, sequential, reserved thought processes for the sake of generating lots of ideas
- Our creative juices are allowed to flow freely - one idea after another in rapid succession
- We do not clarify or evaluate any of the ideas until after the brainstorm is over



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Let's brainstorm our answers to the following question...

If we had true "gender equality" in education in Africa, what would it look like compared to what we have now?



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Key Concepts

- Gender Parity
- Gender Equity
- Gender Equality



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Gender
Parity?



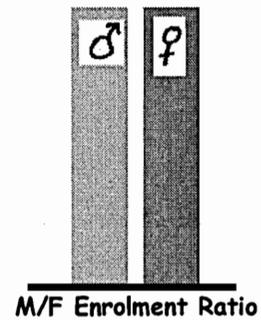
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Gender Parity...

Achieved when the same proportion of boys and girls - relative to their respective age groups - enter the education system and participate in its different cycles

Achieving gender parity is just one step towards achieving gender equality



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Gender
Equity?



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Gender Equity...

... is the process of being fair to women and men.

Equity measures compensate for disadvantage and ensure that both girls and boys have the opportunity to fully access, participate and benefit from education.

Some examples:

- Bursaries for girls to offset perceived opportunity costs of schooling
- Teacher training to increase student participation and reduce gender bias in the classroom
- Curriculum revision to free lessons and books of negative stereotypes of boys and girls



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Gender
Equality?



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Gender Equality...

...is a broad concept and an ultimate goal for development.

It implies that women and men have equal conditions for realizing their human rights and for contributing to and benefiting from economic, social, cultural and political development.



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Moving from Parity to Equality...

PARITY



EQUALITY

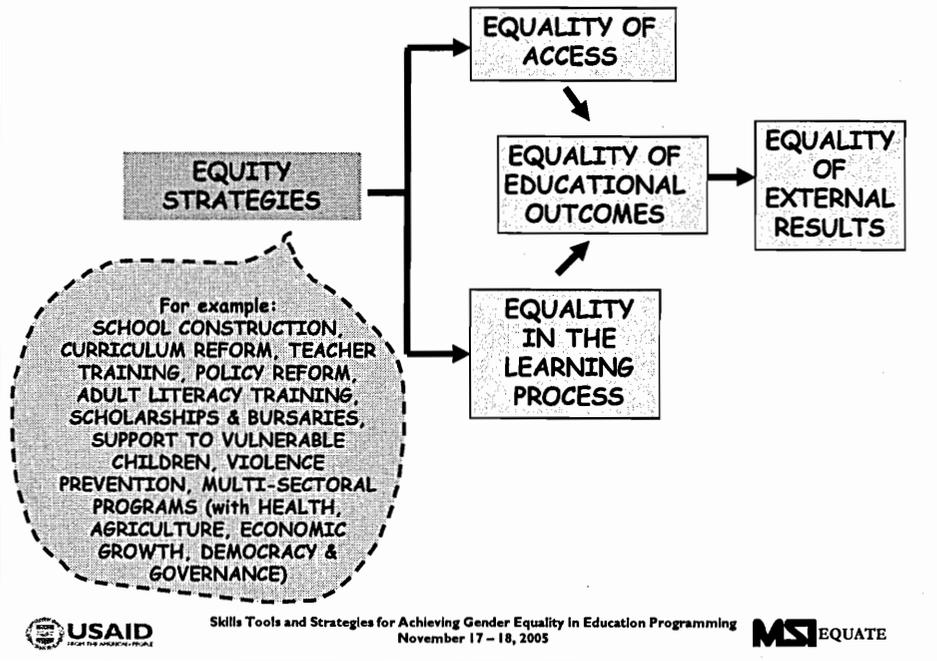
EQUALITY is the result! EQUITY strategies are the means to achieve the result!



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The Four Dimensions of Gender Equality in Education



Equality of Access

Girls and boys are offered equitable opportunity to access and participate in school and other learning opportunities.

Some examples:

- Safe and sanitary facilities
- Bursaries/conditional cash transfers
- Support for orphans and children affected by HIV/AIDS



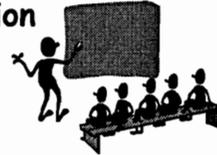
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Equality in the Learning Process

Girls and boys...

- ✓ Receive equitable treatment and attention
- ✓ Are exposed to the same course work
- ✓ Enjoy teaching methods and tools free of gender bias
- ✓ Have equitable opportunities to learn, explore and develop skills in all academic and extracurricular offerings



Some examples:

- Teachers use inclusive teaching practices to integrate marginalized students
- Images in textbooks do not reinforce negative gender stereotypes about either girls or boys



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Equality of Educational Outcomes

Girls and boys enjoy equitable opportunity to achieve. Length of school careers, academic qualifications and diplomas do not differ based on a person's sex



Some examples:

- Girls are not expelled from school because of pregnancy
- Students are not streamed into classes on the basis of sex or gender stereotypes



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Equality of External Results

The status of men and women, their access to goods and resources and their ability to contribute to and benefit from economic, social and cultural and political activities will be equal

Some examples:

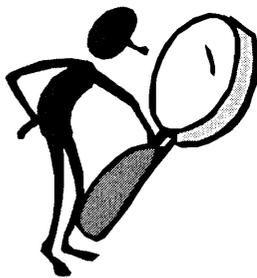
- Job opportunities, the time needed to find a job after exiting the education system, and earnings of men and women with similar qualifications and experience will be equal.
- Improved status of men, women or marginalized groups.



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Gender Analysis



Gender analysis
is not a specific
technology...

Rather, it is a way of
looking at the world, a
lens that brings into focus
the roles, resources and
responsibilities of
women and men within
the system under analysis



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**How can we
apply the
dimensions of
equality to an
education
project?**



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EQUALITY OF ACCESS

Females & males are offered equitable opportunity to access and participate in school and other learning opportunities.

EQUALITY IN THE LEARNING PROCESS

Females & males receive equitable treatment and attention; are exposed to the same course work; enjoy teaching methods and tools free of gender bias; have freedom to learn, explore and develop skills in all academic and extracurricular offerings.

EQUALITY OF EDUCATIONAL OUTCOMES

Girls and boys enjoy equitable opportunity to achieve. Length of school careers, academic qualifications and diplomas do not differ based on a person's sex.

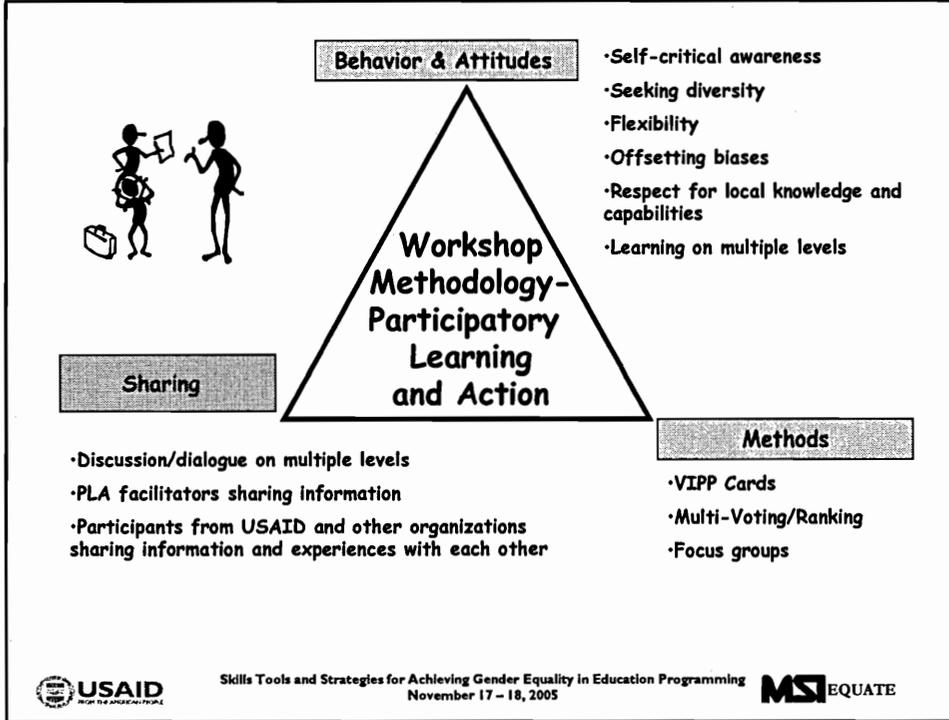
EQUALITY OF EXTERNAL RESULTS

The status of men and women, their access to goods and resources and their ability to contribute to and benefit from economic, social and cultural and political activities will be equal.



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Participatory Reflective Assessment (PRA)

Action-oriented and seek to build capacity by:

- providing stakeholders and beneficiaries with the opportunity to reflect on a project's progress and obstacles;
- generating knowledge that informs practice and can lead to corrective actions; and
- providing beneficiaries and stakeholders with the tools to transform their environment. (USAID PRA Notes, 1997)



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Participatory Reflective Assessment

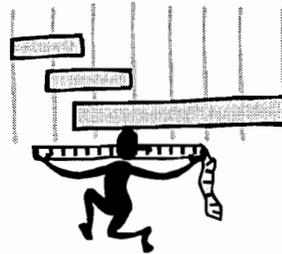
- Use PLA tools
- Involves collective examination and assessment of an activity or program by stakeholders and beneficiaries.
- People-centered: project stakeholders and beneficiaries are key actors of the evaluation process rather than objects of the evaluation.



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How can we apply a gender perspective when monitoring and evaluating our programs and projects?



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A Performance Indicator is...

- **An observable or measurable characteristic that shows, or "indicates," the extent to which an intended result (i.e., output, impact, etc.) is being achieved**
- **A performance indicator answers the question, "How will we know and report achievement when we see it?"**



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Performance Indicators...

- **Tell us how we will recognize success**
- **Force us to clarify what we mean by our intended results**
- **Provide an objective basis for monitoring and evaluating...and, if necessary improving performance**



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A brief review... High Quality Performance Indicators are...

- Direct
- Objective
- Adequate to measure the result
- Practical

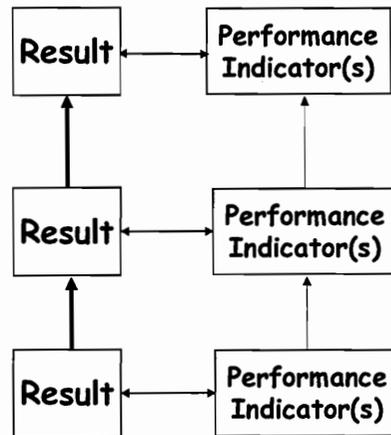


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Indicators are DIRECT...

- Indicators are straightforward and valid measures of the objective
- If direct indicators are not feasible, use credible proxy measures



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Indicators are OBJECTIVE...

- Framed and defined in clear, precise and one-dimensional terms
- Not open to varied interpretation in data collection or review
- Ensure a reasonable level of objectivity and comparability over time
 - ❖ Particularly in the case of qualitative indicators



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Indicators are ADEQUATE...

- Use only as many indicators as necessary to measure a result
- Make sure that the indicators you use are sensitive to change
 - ❖ Does the indicator provide timely data on change?
 - ❖ Is the indicator calibrated in a way that will show meaningful change?



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Quantitative and qualitative indicators

- Quantitative indicators
 - ❖ number, amount, ratio, percentage, proportion, average score, rating, weighted or non-weighted index
- Qualitative indicators
 - ❖ documented observations, representative case descriptions, judgments or perceptions about a topic that capture descriptive detail



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Quantitative and Qualitative Data: Two Examples

Country A			Country B		
Quantitative Data	Qualitative Data	Policy Priority	Quantitative Data	Qualitative Data	Policy Priority
Ratio of girls to boys at secondary school increased from 1:3 to 1:1 over the previous 5 years	More secondary school places have been created (especially for girls)	School building program to continue with emphasis for places for both boys and girls	Ratio of girls to boys at secondary school increased from 1:3 to 1:1 over the previous 5 years	Boys are not attending school in order to work and earn money in the informal sector	Introduce flexible school schedules. Encourage boys to stay in school (ie/media campaigns, positive male role models)
	Girls are encouraged by parents to complete secondary education	Media and advocacy programs to continue		Boys believe that school is not relevant to their lives	Curriculum reform to increase relevancy to males and school-to-work policies
	Teenage pregnancy rates are down	Reproductive health/life skills included in the curriculum		Boys are treated harshly and discouraged by teachers	Teacher training to ensure equitable and fair treatment of boys & girls

Quantitative or qualitative indicators?

- Can we get meaningful information by using quantitative indicators?
- Can we get objective, convincing information by using qualitative indicators?
- Can we quantify our qualitative indicators without losing important information?
- Do we need a mix of the two?



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Indicators are PRACTICAL...

- Are the data associated with the indicator practical to collect and use?
Ask whether...
 - ❖ Quality data are currently available—a critical question in data-poor environments
 - ❖ The data can be obtained on a regular and timely basis
 - ❖ Primary data collection, when necessary, is feasible and cost-effective



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Gender-sensitive Indicators

- Indicators that are “disaggregated” by sex (among, perhaps, other differences), where disaggregation is appropriate
- Indicators designed specifically to measure important qualitative results with respect to women and men, boys and girls



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What kinds of indicators
(and sources of data)
might we use to monitor
the effectiveness of
equity strategies
aimed at increasing
gender equality?



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M&E Framework

Participatory Reflective Assessment

Involve representative stakeholder groups

Use Qualitative & Quantitative Data

Include:

- Statistical Surveys
- Community Mapping
- Focus Group Interviews
- Classroom Observations



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Strategies aimed at increasing equality of access, e.g...

a radio program aimed at changing parents' and guardians' attitudes about sending boys and girls to school

a school improvement program aimed at making it easier for boys and girls to attend school



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Strategies aimed at increasing equality in the learning process,

e.g....

a teacher-training program aimed at increasing teachers' equitable treatment of boys and girls in the classroom

a curriculum-redesign strategy aimed at reducing gender stereotypes in learning materials



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Strategies aimed at increasing equality of educational outcomes, e.g....

school-based program aimed at developing leadership skills among boys and girls

accelerated learning programs aimed at helping students whose education has been interrupted by civil strife, pregnancy and other hardships achieve academically



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**Strategies aimed at increasing
equality of external results, e.g....**

**a non-formal education program aimed
at increasing students' ability to earn
after graduation**

**a school-based program aimed at
reducing students' risks with respect
to HIV/AIDS and other STDs**



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**One more
consideration:
Where do our
programs and
projects fit on
the Continuum?**



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Continuum of Approaches for Addressing Gender Needs in Programming



Exploiting Gender Inequities	Accommodating Gender Roles	Transforming Gender Relations
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Continuum of Approaches for Addressing Gender Needs in Programming

Exploitative: Programs that exploit gender inequities in pursuit of project objectives.

Accommodating: Programs that accommodate gender roles to achieve project objectives.

Transformative: Programs that seek to transform gender relations to promote equality and achieve project objectives.



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Where do your program and project strategies lie on the continuum?

PROGRAM/ PROJECT STRATEGIES	EXPLOITING GENDER INEQUITIES?	ACCOMMODATING GENDER ROLES?	TRANSFORMING GENDER RELATIONS?
Result 1: _____ Output: _____ Output: _____ Output: _____			
Result 2: _____ Output: _____			
And so on...			



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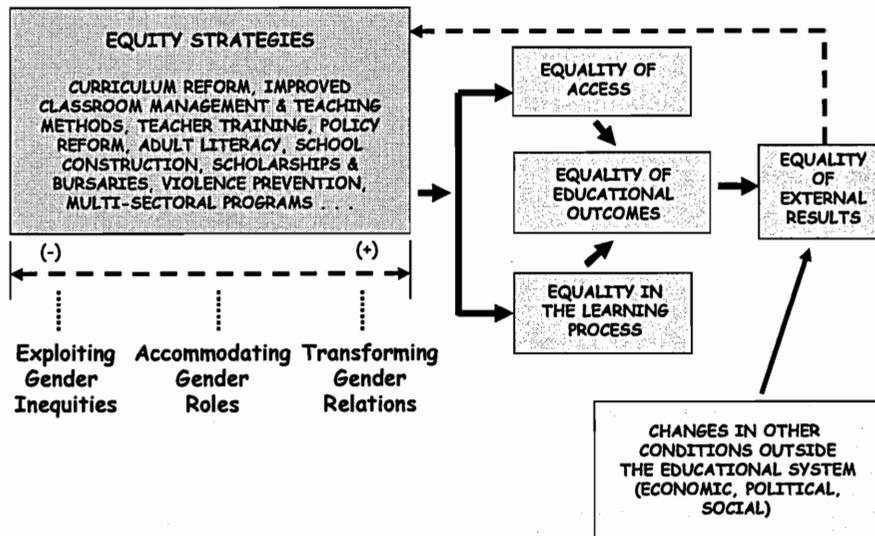
Putting it all
together



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Gender Equality in Education: a causal framework...

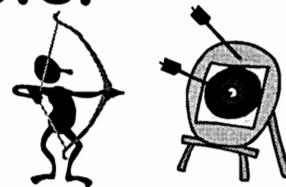


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From Reflection to Results...

Given all we have talked about in this workshop, what specific result will you try to achieve?



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Evaluation of Basic Education SO II
Community/Government Partnership Program
USAID Ethiopia – June and July 2005



WID IQC Funding Mechanism

Ginny Seitz - Juárez and Associates



October 5, 2005

**Findings: COMMUNITY PARTICIPATION AND SUPPORT
GIRLS EDUCATION ADVISORY COMMITTEES**

- Grew out of a community innovation at one school in SNNPR in BESO I project
- Not mandated by Ethiopian government
- Not "girls clubs"
- Includes teachers, students, mothers, community leaders
- Supported by project staff and teachers trained by other BESO project
- Community members receive NO separate resources or training
- GEAC only formal space in community for addressing gender inequality



Members of Girls Education Advisory Committee in Oromiya

**Findings: COMMUNITY PARTICIPATION AND SUPPORT
GIRLS EDUCATION ADVISORY COMMITTEES**



GEAC members were asked to draw the reasons why girls do not go to school

Data Collection Tools:

- Group interview facilitated and translated by women
- Drawing
- Storytelling
- Decision Matrices

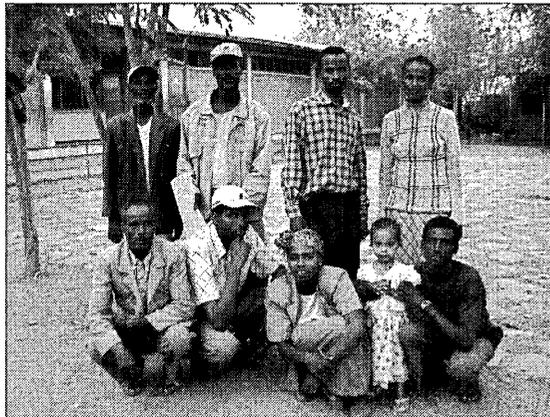


**Barriers to girls' education identified by
GEACs**

Most important:

- Early marriage
- Abduction and Rape for marriage

"irrecha" in Oromiya
"abusuma" in Afar



Abduction and Rape for Marriage:

- Man has no funds for bride payment or is refused by girl's family
- Man abducts and rapes girl (often age 12-13)
- Rape reduces her future marriage value
- Traditional leaders negotiate settlement with parents
- Girl "marries" abductor

Barriers to girls' education identified by GEACs

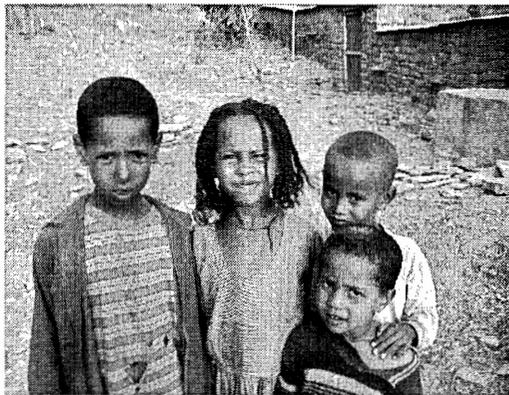
- FGM
- Lack of knowledge about female biology (embarrassment)
- Low cultural value placed on women and girls
- Dependency of mothers
- Teasing by male students
- Low self-esteem of girls
- Poor examination results
- Distance from school (fear of rape, abduction, and "misbehaving" girls)



Afari children in ABE Center

Barriers to girls' education identified by GEACs

- Demand for female child labor
- "If a girl is educated, she will not be a good mother"
- Absence of female role models
- Fathers see education of girls as "wasted"
- Belief that girls will become sexually "out of control"
- Increase in orphans



Child beggars in Tigray

GEAC Strategies

At the school...

- Meet with student body to encourage boys' respect for girls
- Office built by PTA for use of GEAC to counsel girls
- Girls Clubs refer girls for counselling and early marriage alert
- Tutoring program for girls (Academic prizes for girls)
- Conduct household census to identify girls who should be in school
- Incentives offered to families with girls in school (WFP)
- Establish school "police" to protect girls on way to school and on compound
- School-based income-generation to support extremely poor girls (clothing, food, etc. provided)



Teacher in Tigray primary school

- Boys and girls instructed on illegality of rape and how to interact and respect each other
- Biology and Hygiene classes for girls
- With PTA: Construct separate latrines and request female teachers

GEAC Strategies

In the community...

- Members, including girls, present socio-dramas and read poetry to promote girls education and gender equity
- Educate and enlist cultural leaders (clan and religious) to support girls education and discourage abduction, etc.
- Awareness-raising campaigns on harmful effects of FGM, early marriage and motherhood; connections to HIV/AIDs
- Home visits to parents to discourage early marriage and encourage girls education
- When necessary, report plans for early marriage to police and demonstrate at police headquarters and courts



- Brought in authorities to inform community on illegality of abduction and early marriage
- Follow girls' attendance and follow-up with parents when girls are absent
- Identify people who will adopt orphans
- Establish child rights committee

Results of GEAC Strategies

- Increased enrollment
- Decreased drop-outs
- Improved girls academic performance
- Girl-friendly and safe school environments
- Improved attitudes and behaviors of boys
- Girls come to school during menstruation
- Increased self-esteem
- Girls report abuse to GEAC
- New resources for school



Members of GEAC with school principal at "positive deviance" school

Results of GEAC Strategies

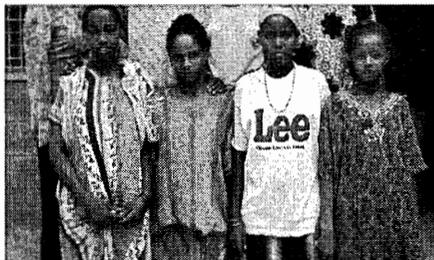
- Parents, community leaders better informed
- Early marriages prevented
- Girls "saved" girls from *irrecha* and *abusuma*
- Decrease in abductions
- Hold police and courts accountable (prosecutions)



"The significance of the intervention by the Girls Advisory Committee is that it interrupts the resolution of the conflict by traditional means, i.e., they discourage the intermediaries from mediating between parents and abductor's family to settle with girl "marrying" abductor. The abduction now becomes a criminal act subject to intervention by the formal justice system. By refusing to act as intermediaries, respected and influential community leaders validate the view that abduction is wrong and unacceptable in the community." Holie Folie, WL, Ethiopia

Lessons Learned from GEACs

- GEACs are the least-resourced of all CGPP activities. Yet, they have created a safe place for girls and a valid space within their communities to advocate for girls education and gender equity.
- GEACs are in the front lines against early marriage and other harmful gender practices.
- Membership on GEACs of mothers, teachers, students and community religious and clan leaders (men and women) is good strategy for establishing legitimacy of its issues.
- GEACs have contributed to MoE's decentralization goals by mobilizing communities and acting on issues raised by girls in schools.



12 and 13-year-old members of GEAC In Afar

- GEACs have provided a crucial link from school to families and cultural leaders.
- GEACs have organically broadened their mission and are community-based institutions for resiliency.

Lessons Learned from GEACs



ABE Center students in Afar

- GEACs have had little training and field-level resources, yet have increased expectations from project for training (TOT) and locally appropriate gender training materials.
- Gender resources available from partners not accessible or relevant to community context. (Too theoretical, not contextual or participatory.)
- Problems encountered are usually associated with the inability of male SDA/SDC, school directors, and others to abandon traditional patriarchal roles and behaviors.

Lessons Learned from GEACs

- People in traditional communities are willing to protect and educate girls.
- Traditional community structures and religious institutions (Iddir, Church, Mosque) can be influenced for positive social change when properly approached and convinced.
- Community-based structures are essential to long-term gender change.



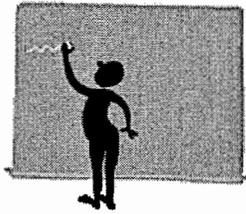
Teachers and member of PTA (right) in Oromiya

Recommendations regarding GEACs

- Provide additional gender training and resources to staff and members of GEACs
- Produce materials for use by GEAC members at community level
- Provide TOT training to GEAC members
- Advocate for formal recognition of GEACs by woreda education offices
- Include of GEACs in sustainability plans



ZAMBIA GENDER ASSESSMENT AND STRATEGY WORKSHOP



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Status of Gender Equality in Zambia

- Situation Analysis: April-May, 2005
- Strategy Workshop: May 23-27



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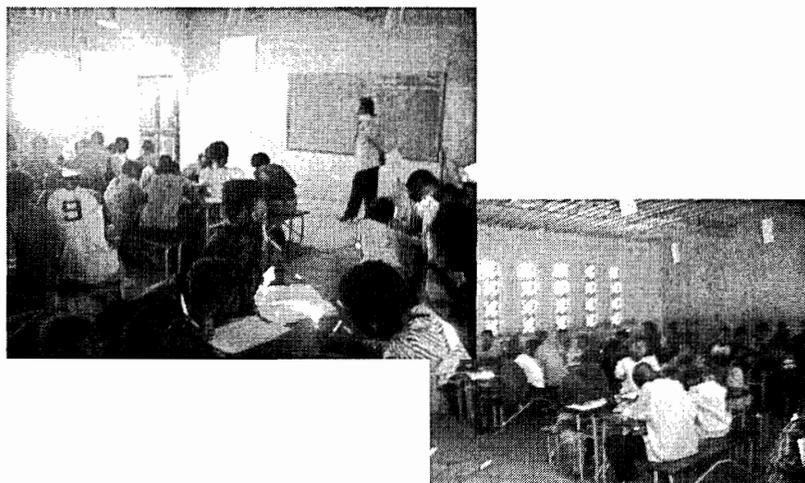
Garden Community School



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Classroom Observation



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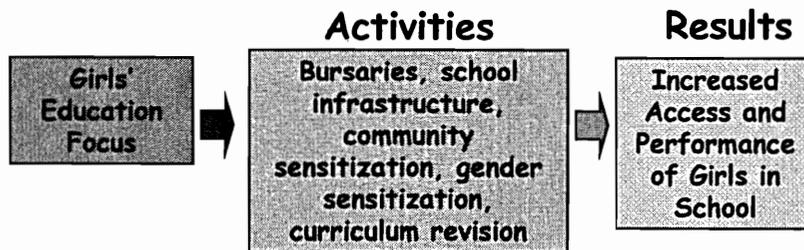
PRE-HIV/AIDS STRATEGY & RESULTS



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Gender Responses to Education Programming 1996-2005 (pre-HIV/AIDS)



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GENDER ASSESSMENT EDUCATION PLANNING AND PROGRAMMING IN ZAMBIA -- 1997-2005



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MSIEQUATE

APPROACHES

Programme for the Advancement of Girls' Education (PAGE)

- 1995-97 Pilot
- 1997-2002 Nationwide in 1,000 schools
- 2002 Mainstreamed into Basic Education Social Sector Improvement Programme (BESSIP)



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MSIEQUATE

RESULTS 1995-2002

- Free Basic Education Policy
- Re-entry policy for pregnant girls: Over 1,000 girls returned to school
- Improved parental support
- Improved gender sensitivity of teachers
- Increased enrolment and completion rates
- Increased achievement for girls in some districts
- Analyses of water and sanitation situations at PAGE schools

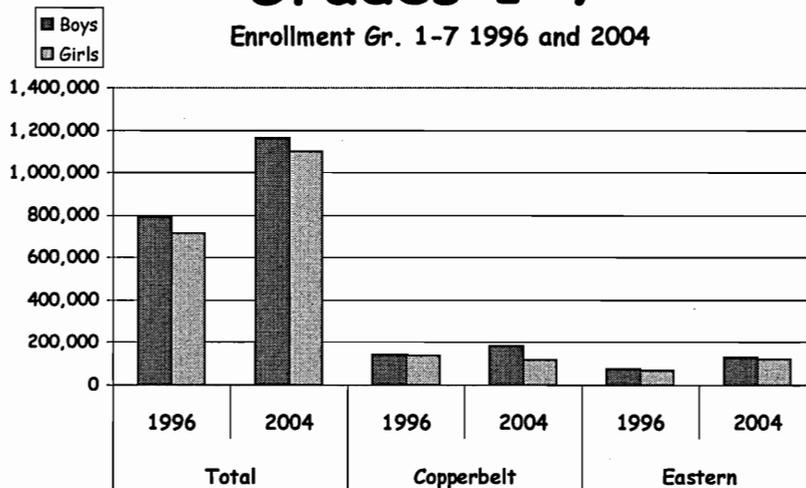


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Changes in Enrollment Grades 1-7

Enrollment Gr. 1-7 1996 and 2004



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THE RECENT EQUATE ASSESSMENT



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Education Quality ↓

- Community schools emerging to create a supportive learning environment in response to the needs of families and OVCs as a result of HIV/AIDS
- FBE – lack of money to employ teachers and maintain and expand infrastructure
- Relevance of curriculum?

EQUATE
Assessment
Results

Capacity for
Gender Equality ↓

- Focus on girls' education unintentionally diminished emphasis on gender equality
- Backlash against girls' education at TTC
- BESSIP and restructuring of MoE resulted in transfer in trained personnel, multiple positions/ roles, lack of accountability for gender equality
- EVERYONE'S BUSINESS IS NOBODY'S BUSINESS!

HIV/AIDS Impact ↑

- Multiple roles of teachers and MoE
- Decrease in teachers
- Increase in orphans



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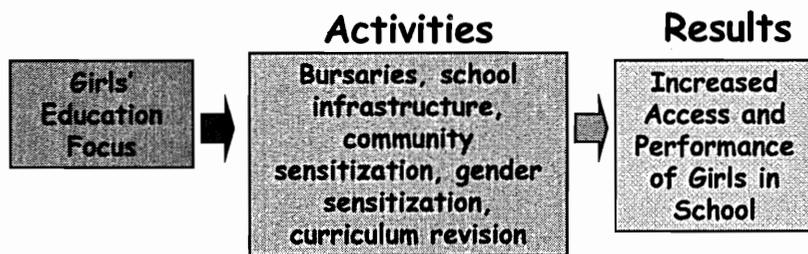
HIV/AIDS-Responsive Strategy



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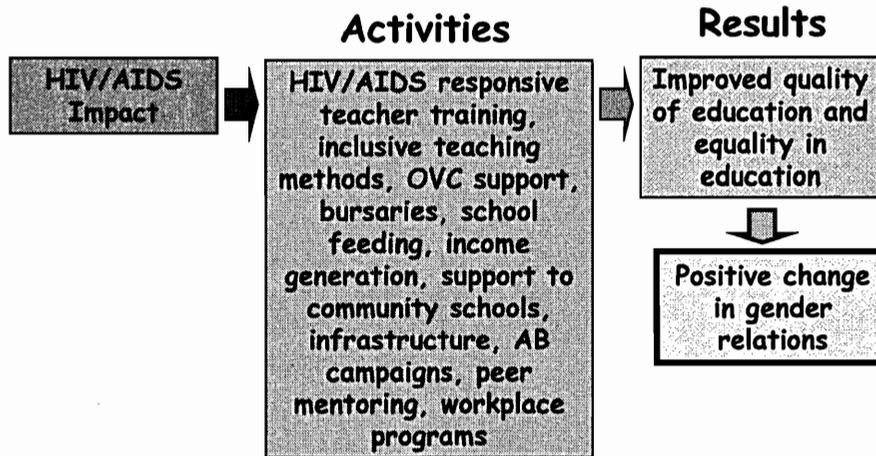
Gender Responses to Education Programming 1996-2005 (pre-HIV/AIDS)



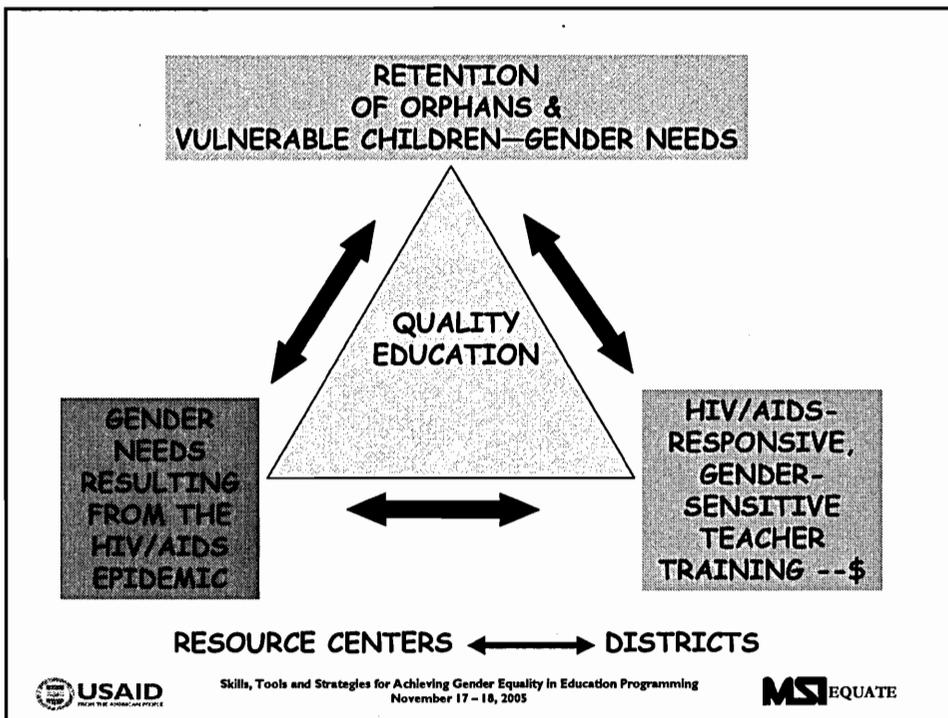
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USAID/Zambia's Response to Changing Gender Needs in Education



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M&E Framework

Participatory Reflective Assessment

Involve representative stakeholder groups

Use Qualitative & Quantitative Data

Include:

- **Statistical Surveys**
- **Community Mapping**
- **Focus Group Interviews**
- **Classroom Observations**



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Key Program Indicator

Percentage of all children in USAID-supported Basic Education Programs at a "Critical Drop-out Vulnerability Point"* who stay in school to the next grade/level.

Total Percentage and Disaggregated by...

- ✓ District
 - ✓ BE Program (Government School, Community School, IRI)
 - ✓ OVCs vs. Others
 - ✓ Female vs. Male

Critical Drop-out Vulnerability Points: Government School: Grade 6; Community School: Level 3 or Grade 5; IRI: ?



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E.g., For Government Schools ...

Cohort	Year 1	Year 2	Year 3	Year 4	Year 5
1	(# completing Gr. 6 at end of yr.) / (# entering Gr. 6 at start of yr.)	Possible follow-up research to see if they continue through Gr. 7 & beyond			
2		(# completing Gr. 6 at end of yr.) / (# entering Gr. 6 at start of yr.)			
3			(# completing Gr. 6 at end of yr.) / (# entering Gr. 6 at start of yr.)		
4				(# completing Gr. 6 at end of yr.) / (# entering Gr. 6 at start of yr.)	
5					(# completing Gr. 6 at end of yr.) / (# entering Gr. 6 at start of yr.)

Disaggregated
by district,
OVCs vs.
Others, Sex



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10/11/15

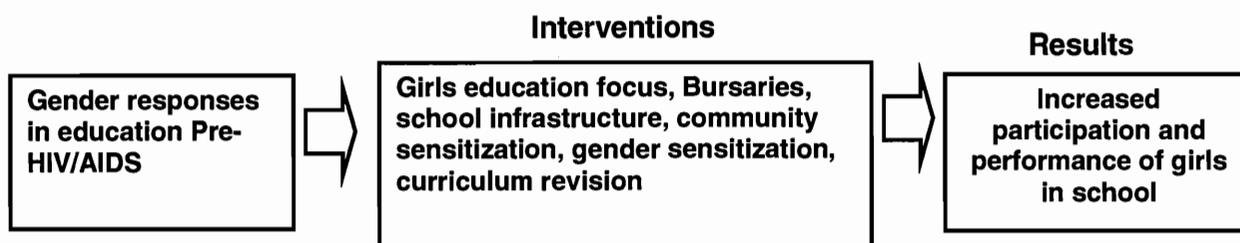


State of Gender in Education in Zambia

Summary Findings of USAID Gender Assessment and Strategy Workshop

USAID/Zambia recently conducted a gender assessment and strategy workshop with the key objective of improving the quality of its education programs. In general, the assessment findings show that gender interventions in education over the last decade have mainly focused on reducing gender disparity in access to education. Interventions, as Figure 1 shows, have primarily had the expected result of increasing girls' participation in the school system. Since this approach has mainly been driven by an access agenda, there has not been sufficient attention paid to 'quality of education' as a gender programming consideration.

Figure 1: Gender Responses to Education Programming (pre-HIV/AIDS)



A further finding of the assessment is that the negative impact of HIV/AIDS on the education system has simultaneously accelerated the decline in the quality of education and forced a significant shift in gender needs for both learners and teachers. HIV/AIDS has dramatically reduced the quality of teacher-pupil contact time particularly for orphaned and vulnerable children (OVC), in a learning environment compromised by stress in and out of school, gender violence and a poor supply of school requisites. Many OVC have moved out of the public school system and entered community schools which are perceived to provide 'OVC-friendly' learning conditions. The assessment findings show that the current situation requires a continuum of gender interventions particularly designed to promote relevant and quality education. In fact, in response to the shifting gender needs, the findings show a need for a shift from the disproportionate focus on pragmatic girls' education interventions to include more qualitative gender transformative interventions.

Figure 2: Response to Shifting Gender Needs in Education within Context of HIV/AIDS

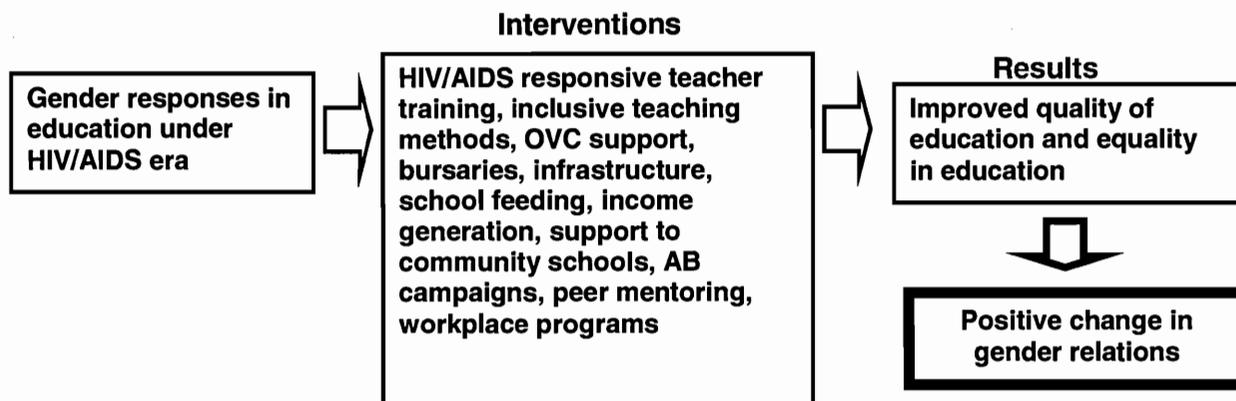


Figure 2 above suggests a number of interventions required, particularly under the changed circumstances, to promote four critical dimensions of gender equality in education: equality of opportunity, equality in the learning process, equality of outcomes and equality of external results. **Equality of opportunity** means that girls and boys are offered equitable chances to access and participate in school. **Equality in the learning process** entails that girls and boys receive equitable treatment and attention in school. **Equality of outcomes** means that girls and boys enjoy equitable opportunities to achieve in school. The fourth dimension, **equality of external results**,

means that men and women with similar qualifications not only enjoy equitable chances to participate in social, political and economic life, but also are equally rewarded.

The assessment findings show that the quality of education in the public school system in Zambia has been declining. HIV/AIDS has added a complex and deleterious dynamic on the already weak education system. The HIV/AIDS induced pressures on the education system include teacher absenteeism due both to illness and also caring for sick family members, a high number of teacher deaths, and the rapid increase in orphans. Current education statistics show that there are an estimated 407,729 (approximately 20%, 210,854 boys; 196,875 girls) orphans of the total 2,139,951 pupils enrolled in basic education (grades 1-9). Outside the public school system, over 500,000 children are enrolled in community schools. Approximately 70% of this population consists of orphaned children.

For communities, HIV/AIDS has forced a drastic shift in household expenditure from education to health as families take care of sick family members. A distressing finding from the assessment is that many HIV/AIDS orphans, particularly girls, are abused in their foster homes. Some community members interviewed also indicated that orphans who were presumed to be HIV/AIDS positive were not sent to school by guardians because they were expected to die anyway. Community schools have helped to ease the costs of providing education for OVC. In fact, children interviewed at one community school indicated that not only did their school provide a better education, but also they were mentally at peace in a school setting where they did not stand out because of not wearing shoes, uniform or good clothes.

These findings show that the challenge of responding to gender needs in education requires factoring in, among other issues; the stress and abuse that children experience in and out of school, HIV/AIDS and the constraints it puts on teaching and learning, and the rising opportunity cost of schooling. Many children have left the school system to engage in income generating activities to support households. For this group, the gender dimension of 'equality of opportunity' requires providing education tailored to respond to the difficult circumstances they are faced with. For example, delivering education using radio technology allows many out-of-school children to access education in a flexible way. Within the school system, 'equality in the learning process', could be achieved both with relevant curricular and better teacher instructional methods. Beyond the school settings, adult literacy interventions are critical in promoting the four dimensions of gender equality both because they are empowering and are also critical in augmenting the learning support system for children. Parents at a community school indicated that they would provide better support to their children if they, themselves, were educated.

In response to these findings, the assessment proposes a shift in approach to gender programming in education from 'parity' and 'equity' as goals to 'gender equality' as the ultimate objective. Accordingly, equity strategies are the means to achieve gender equality. Central to this shift in focus is a critical attention to quality of education as a gender programming consideration. Improved education quality responds to a variety of critical needs including promoting positive gender dynamics, family participation in schooling, economic empowerment for poor citizens and health improvements. Indeed, gender roles and how they are perpetuated is symptomatic of a deeper problem about the quality of education. Progress in improving the quality and relevance of education will create more positive incentives to increase participation in school and alter gender roles, particularly among the poor, in the long term.

Progress in promoting this shift in focus requires collecting good information. The assessment demonstrated that gender analysis should not be a complicated exercise. Using the Participatory Learning Action (PLA) method, participants in the assessment collected very useful information in a short period of time. Other simple tools used in the assessment included classroom observations and focused group discussions. These simple data collection methods are critical in developing good gender sensitive indicators. Gender sensitive indicators are designed specifically to measure important qualitative results with respect to women and men, boys and girls. So far, good gender programming has been comprised by a strong reliance on sex disaggregated data. Nevertheless, good gender programming in education will become entrenched only with the constant realization that interventions, however well designed, impact males and females differently.

Integrating Gender into OVC Educational Programs/Projects

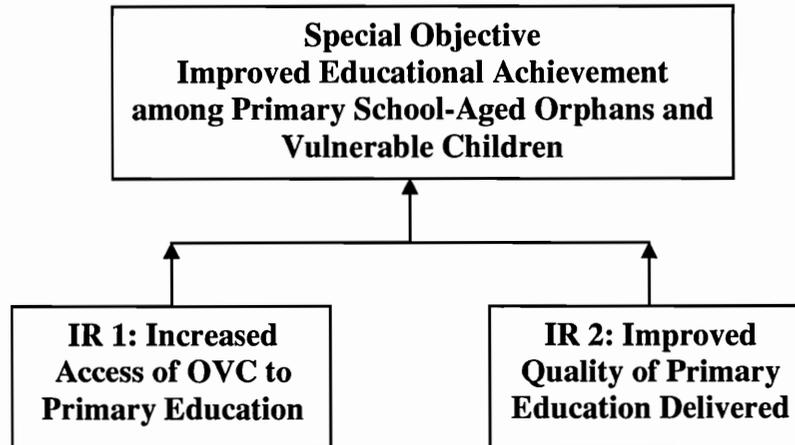
Examples of Issues to Address

- **Formal and non-formal education** that takes into account differential attendance and learning needs of female and male OVC through provision of flexible schedules, distance education, childcare, income generation
- **Psychosocial dimensions** of sexual violence and exploitation, stigmatization, grief, and/or cultural dislocation
- **Food security and health** needs through teaching methods of food production as well as nutrition
- **Economic strengthening** for parents and guardians to reduce the opportunity costs of sending OVC to school
- **Reproductive health issues** and HIV/AIDS awareness, prevention, and care for victims
- **Role models** for boy and girl OVC
- **Support for education** of caretakers (especially girls, women, mothers, grandmothers)
- **Safety and security issues** including codes of conduct for teachers
- **Discipline methods** for boy and girl OVC at school
- **Extra-curricular programs** and activities to support boy and girl OVC (anti-AIDS clubs, Girl Guides, Boy Scouts)
- **Relevance of curricula, textbooks and other learning materials** to the specific gender-based needs of OVC; avoid gender stereotypes and negative perceptions of gender and gender roles
- **Use of mass and local media** to raise awareness about OVC education problems and needs
- **PTAs, community, and faith based organization involvement** in providing support to OVC education
- **Accelerated learning programs** for students whose education has been interrupted by pregnancy, caring for sick parents, or conflict
- **Cross sector synergies** that allow private and public sphere to coordinate on OVC education
- **Labor market options** of boy and girl OVC during and after school completion
- **Human rights** issues surrounding education for HIV/AIDS and OVC
- **Inheritance and property rights** for male and female OVC

Considering the Gender Needs of Orphans and Vulnerable Children (OVC)

You are the member of a mission's Education Strategic Objective Team. Your mission's recently approved Strategy Statement proposed the following special objective: "Improved educational achievement among primary school-aged orphans and vulnerable children (OVC)." The focus of this special objective on OVC, particularly children affected by the growing HIV/AIDS epidemic, results from the fact that to date, little direct attention has been given to the special needs of this target group.

Your team is now designing a project to achieve the Special Objective. The team believes that the project should have two key thrusts aimed at improving educational achievement of OVC. These are increased access and improved quality of education, as shown in the following results framework.



Qualitative and quantitative data has recently been collected through household surveys and focus group discussions on the education needs of OVC. Given the information available, you must determine how to ensure that the gender-related needs of OVC are addressed by the project. In short, your question for this exercise is the following:

What specific strategies/activities and outputs should be incorporated into the design of this project to ensure that gender considerations are addressed?

Quantitative OVC Education data

- Adult HIV prevalence is 18% among females and 13% among males. This is the 5th highest prevalence in the world.
- In 2000, 45% of the total population was below 15 years. Among young people age 15 to 19, HIV/AIDS prevalence is 6.6% for females and 1.9% for males.
- HIV prevalence is generally more than twice as high in urban areas as in rural areas; 23% and 11% respectively
- A recent national survey indicated that fears of stigma are widespread: 38% of men and 39% of women said that if a family member were HIV infected, they would want to keep it a secret.
- There are 1.1 million orphans living nationally, representing 19% of all children; 630,000 are orphans due to AIDS. This problem affects girls and boys equally.
- Thirty-three percent of orphans live with their grandparents, together with 12% of non-orphaned children.
- Estimates of total numbers of street children range from 75,000 to 200,000 children. The majority of children who take to the streets are boys.
- Sixty-four percent of OVC attend school compared to 72% of non-OVC students.
- In 2002, 27% of 15 to 24 year olds had never been to school, more than 50% of whom are girls.
- Nationally, girls enrolled in Grade 1 almost equal boys. The gap between the sexes widens considerably in Grades 5-7 where girls constitute only 40% of those enrolled. This figure drops as low as 33% in the more remote and poor rural districts of the country.
- Only 52% of girls who enter grade 1 complete Grade 7.
- Although provincial variations exist, dropout rates for girls tend to be higher than for boys
- The level of reading achievement for Grade 6 is below that for boys. Less than a quarter of the girls in Grades 6 reached the minimum level of reading ability expected by their teachers

Focus Group Results

A series of focus groups were conducted with orphaned girls and boys, widowed mothers and fathers, and guardians of OVC from urban and rural communities. During focus group discussions, participants were asked to reflect on how HIV/AIDS affects girls, boys, and families with regard to who is able to go to school and who is not. Responses are captured below.

Girls Focus Group (age 8 to 15)

- Girls take care of sick parents at home, which keeps them out of school
- Poverty and early marriage affect girls' enrollment at school
- Girls have less time to study because they are overworked at home
- Fewer girls pass because of household responsibilities
- Girls are pressed into prostitution due to poverty
- There are higher dropout rates among girls due to HIV/AIDS
- Girls enter into relationships because of financial problems at home
- Some girls have run away from guardians because of abuse (emotional, physical and/or sexual)
- Girls are forced into early marriage
- Many girls live in households headed by themselves or older siblings
- Girls enter into sexually exploitative relationships with teachers

Boys Focus Group (age 9 to 15)

- Boys drop out of school to work and help make money for their siblings/parents
- Having no parents has made it difficult for some boys to study or even go to government schools because of required fees and lack of understanding when they are away from school for a long time
- Boys must steal or work to support themselves
- Many boys have become street-children
- Need to care for sick relatives keeps boys away from school
- When there is not enough food at home, boys go out onto the streets to search for it and do not attend school
- Many boys live in households headed by themselves or older siblings
- Guardians do not have enough money to provide necessities for them

Boys and Girls (age 8 to 15)

- Boys and girls lack role models
- Boys are girls' labor is exploited in foster families and at school
- Orphans lose property when parents do not leave behind a will
- Orphans aren't taken care of when a parent doesn't designate a guardian
- Orphans have psychosocial trauma when they don't have closure and means of remembering their parents
- OVC have difficulty paying for school fees, education materials, and uniforms

Women's Focus Group (Widows and female guardians)

- Family is struggling because there is not enough money
- They can not afford to buy things and pay school fees and uniforms
- Have taken in more children to care for and cannot afford to feed them all and send them all to school
- Life is hard without a man
- There is little respect for a woman whose husband has died of HIV
- Children boys and girls are sent to market to sell things
- Women are suffering and need education to know how to sustain their families
- Grandmothers want to know how to care for orphans and need information about
- HIV/AIDS prevention
- Wives often lost their property to their husband's family when the husband dies

Men's Focus Group (Widowers and male guardians)

- Sometimes (most of time) children go without lunch
- We try to educate all the children, but sometimes the youngest is removed from school to allow elder siblings to attend
- My son won't go to school if there is no food
Girls are married off early so we can collect the bride prize and so they become someone else's responsibility
- The family has grown due to the children who have joined us to go to school.
- Men have to do things at home that their wives did and find it difficult

Speak Luvo Speak Jane

South Africa & Kenya, 16 min, 2003

Social support systems in many developing countries are overwhelmed by the dramatic increase in children and youth without parents. Orphans and vulnerable children (OVC) living in families coping with chronic illness, as well as children infected with HIV, have less access to education, fewer income opportunities and an uncertain supply of nourishing food.

In the film *Speak Luvo Speak Jane*, eight-year-old Luvo and five-year-old Jane share their impressions growing-up in South Africa and Kenya, as they struggle to overcome the deadly impact of AIDS on their families. Local nursery school children, equipped with plastic video cameras, document how children in their villages understand AIDS and what we can do to help their orphaned friends.

Questions to ask yourself:

- What are some of the problems Luvo and Jane mention in the video? How are these different for children, parents living with AIDS and grandparents?
- Given the challenges they face, what services do OVC require?
- What attitudes, behaviors and skills could schools and communities foster to enable OVC to cope with the challenges of everyday life?
- How could the problems faced by OVC be different for girls than for boys? Are gender roles and relations being transformed?

Continuum of Approaches for Addressing Gender Needs in Programming

1. Campaign to Increase Literacy

A pilot program was designed to increase literacy amongst adults in rural communities. Materials prepared for the program included a serial cartoon strip. Main characters were Juan, an older male 'lothario' with several young female lovers, and Maria, his downtrodden wife burdened with raising 5 children, keeping house and tending to their small plot of land. The program was very successful and literacy increased.

2. Increasing Girls' Access to Education

Community awareness campaigns encouraged parents to enroll their daughters in school, increasing girls' participation rates. Once in the classroom, girls were seated at the back of the room and not called on by teachers to participate during science experiments or math class. Girls were praised by teachers for being 'neat,' 'quiet,' and 'dainty' while boys were praised for being 'curious' and 'strong.'

3. Girls' Scholarship Activity

Despite investments to improve school infrastructure, girls' enrolment in primary school remained low. A scholarship activity was introduced to encourage parents to send their daughters to school. Financial incentives to parents included cooking oil in exchange for their daughters' regular school attendance. As a result of the program, girls' enrolment and persistence in school increased, while that of boys decreased. When the program was evaluated it was found that parents withdrew their boys from school so they could mind their younger siblings and tend to the household chores their sisters had previously been responsible for.

4. Youth Outreach

An education project was concerned about rising STI and pregnancy rates among youth. Unable to convince the predominantly Catholic public school system to incorporate a life skills and reproductive health curriculum in high schools, the program decided to recruit volunteer peer educators to conduct informal discussion groups. Peer educators ran after-school neighborhood youth 'chats' in mixed-sex groups, to discuss issues related to dating, relationships, reproductive health, and contraception. They also provided information on where contraceptives could be obtained.

5. Building Democratic Schools

A long-term effort to improve the quality of primary education introduced participatory teaching methodologies and open-classroom systems in all public schools. Teachers were re-trained to act as learning facilitators rather than traditional lecturers. Other innovations included the introduction of individually

paced learning; small-group and peer-directed study; active, democratic student government; and strong parent and community participation in school activities. All students, including girls, are viewed as important members of the school community and valued for their contribution to peer-group, class and school activities. Girls assumed active leadership roles through student government and showed increased self-esteem and confidence. The adoption of participatory student-centered teaching practices increased the participation of all students and resulted in improved academic performance, visible in the increased progression of boys and girls through the fifth grade.

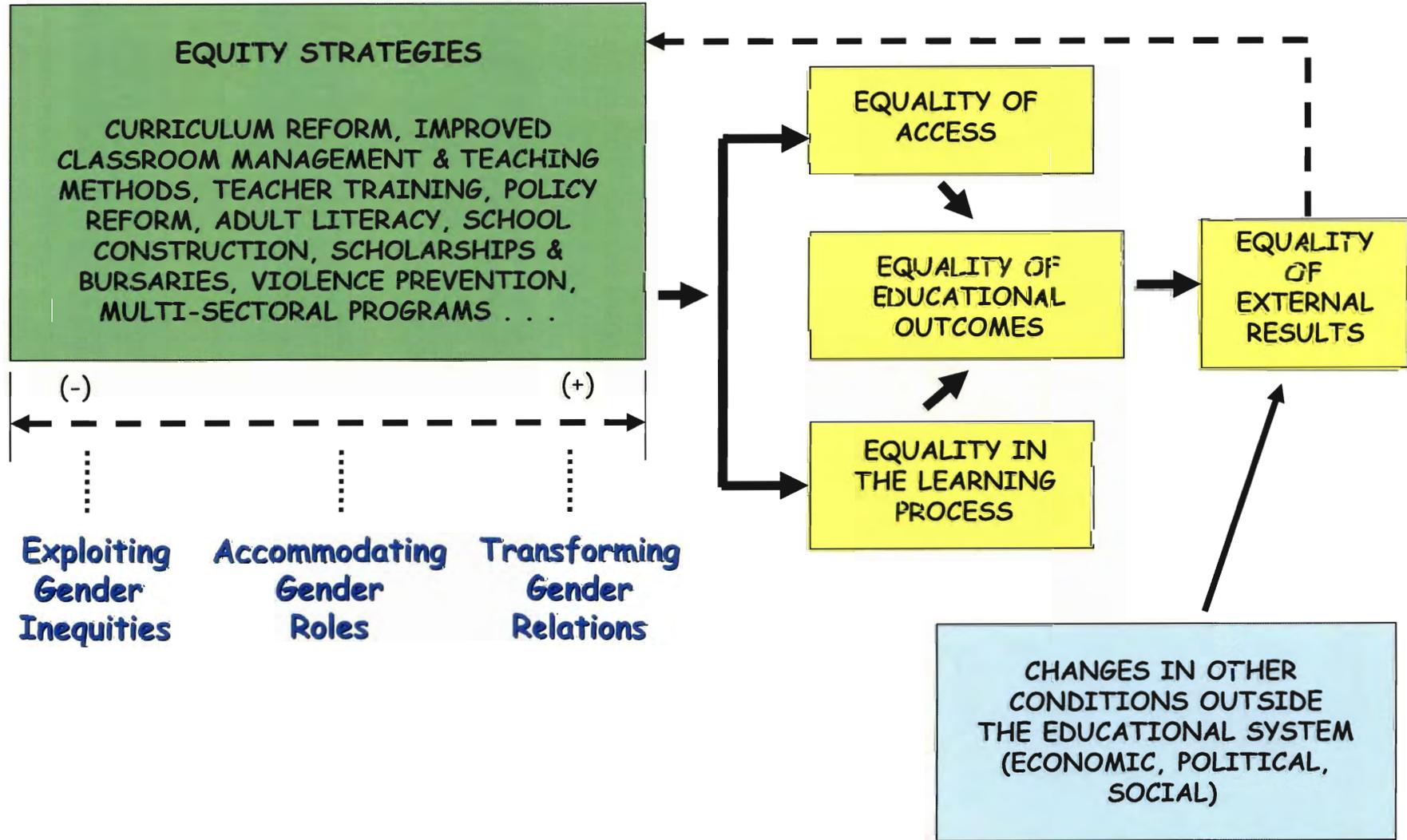
6. Decentralized Education Management

In attempts to modernize and improve the efficiency of the Ministry of Education, a series of decentralization policies to increase the effectiveness of education management were implemented. In order to upgrade the skills of MOE staff, regional and school administrators were offered skills training to enable them to carry out their new responsibilities under decentralization. Cluster heads, circuit inspectors, and regional administrators were offered career development opportunities. None of them were women.

7. Conditional Cash Transfers to Women

Recognizing that educational achievement is affected by poor health and malnutrition and that the need to work makes school attendance difficult for many children, the government instituted an innovative program of cash transfers. Cash transfers were provided to poor rural households, on condition that their children attend school and their family visits local health centers regularly. All financial transfers were channeled to female heads of households, as their propensity for spending the extra income on basic household goods was found to be greater than that of male heads of households. By the end of the program's second year, children from participating households received on average 0.64 more years of schooling than other children, secondary school enrolment rates increased 11% to 14% for girls and 5% to 8% for boys, and the probability that husbands made decisions alone about the health and education of their families decreased significantly.

GENDER EQUALITY IN EDUCATION: A CAUSAL FRAMEWORK



Gender Sensitive Quantitative and Qualitative Education Indicators

Measuring performance

- Indicators are used to measure and monitor the achievement of expected results and establish the “success” of our work.
- Good indicators are:
 - ✓ **Realistic:** This implies that we have the means to verify (availability of data, feasible in time, etc); that they are attainable and user-friendly.
 - ✓ **Meaningful:** the link between the indicator and the objective being sought is clear and can be demonstrated.
 - ✓ **Quantitative:** most often indicators refer to facts that can be counted. But not all indicators must be quantifiable.
 - ✓ **Qualitative:** qualitative indicators describe the quality of results (see below for more)
 - ✓ **Time-bound:** This means that the result or outcome being measured has a target date. The project commits to achieving its objective by a pre-determined deadline.
 - ✓ include **Input, Process and Outcome** indicators: Input indicators measure “what was invested in the project” (generally quantitative); process indicators measure “how the project progressed” (these are generally qualitative indicators); outcome indicators measure “what came out of the project”.
 - ✓ are determined by/with **populations** concerned. Indicators are meaningful if relevant for the people concerned.

Gender-sensitive indicators

- Address the gender gaps and inequalities you are seeking to redress (consider the dimensions of gender equality in education – opportunity, learning process, outcomes and external results)
- Requires the collection of data, disaggregated by sex, as well as by age and socio-economic and ethnic groups
- Take into account a long-term perspective (i.e., social change takes time); and
- Use participatory approaches. Women and men actively take part in the planning of performance measurement frameworks, in their implementation, and in the discussion of their findings.

Quantitative indicators refer to the numbers and percentages of women and men or organizations involved in or affected by any particular group or activity. Quantitative indicators draw on the sex disaggregated data systems and records that have been examined during processes of policy or project planning. The availability of quantitative baseline data means that indicators usually include some element of *target setting*.

For example: Women account for at least 50% of school management committee members by the end of Year 2

Qualitative indicators are vitally important. It is not enough to know that women are participating in an activity: the *quality* of their participation and experience, whether in community level meetings, primary school classes or as users of public services, is all-important.

Qualitative indicators (as well as quantitative indicators relating to visible change at the community level) should be developed in conjunction with beneficiary groups. It is only possible to set targets for qualitative change if baseline data is available. This requires baseline surveys. Where baseline data is available on experiences and perceptions, targets for qualitative change can be set.

For example: At least 50% of women participating in school management committees report active involvement in management and decision making by the end of Year 2 (from a baseline of 10% at the start of the project).

Illustrative Gender-Sensitive Indicators

Indicators

Sources of Data

Equality of Opportunity

Degree of willingness of parents to send children to school irrespective of sex

Extent to which schools provide equitable access to girls and boys

% of school-age children enrolled in primary/secondary education, disaggregated by sex

Parental surveys

Access index, including sanitation facilities, class times, accommodation for young mothers/ guardians, etc.

Enrolment registers

Equality in the Learning Process

times per unit in which curricula display gender stereotypes

% of teachers who qualify in child-centered teaching methods

of teachers using child-centered teaching methods in the classroom

Content analysis of curricula

Score on combination of written test and observation in the classroom

Index, based on Classroom Observation tool

Participatory Learning and Action (PLA)

Basic Techniques

What is participatory learning and action?

Participatory learning and action (PLA) is an approach and a set of tools for helping groups of people to identify their own problems, work out options for handling them, create an action plan and organize to carry out the plan.

The basics steps in the participatory process are to....

1. identify the group's problems
2. come up with possible solutions
3. assess the solutions
4. create an action plan
5. mobilize for action
6. monitor and evaluate the results

Where do participatory techniques fit into education activities?

Across all sectors, participatory techniques can be used for identifying needs, for social assessment, for establishing baselines, and for monitoring and evaluation. It can be used in all areas of education. The most important thing to remember is this: all methods are information-producing techniques. You choose the method according to the context.

In this two week workshop we are using the PLA process to identify the problems that In-service tutors face, work to come up with possible solutions, assess the solutions, create an action plan, mobilize for action and monitor and evaluate the results.

In the process you will gain knowledge of participatory approaches to improve teaching-learning dynamics in the classroom using the foundations of PLA.

What are the basics of PLA?

Behavior and attitudes, methods, and sharing are the three basics of PLA.

1. **Behavior and Attitudes** are key to successfully facilitating participation. The kinds of behaviors and attitudes which are necessary for the successful facilitation of PLA include:
 - Respect for local knowledge and capabilities (Reversal of Learning)
 - Rapid and progressive learning
 - "Handing over the stick"
 - Flexibility and informality
 - Offsetting biases
 - Seeking diversity

- Self-critical awareness

2. **Methods** are used to gather and analyse information during a PLA process.

Participatory information gathering techniques include a wide range of tools that can be classified into several areas:

Diagrams

- Pie Chart
- Mapping and Modeling
- Historical and Future (Visioning) Mapping
 - Social Mapping
- Participatory Mapping
 - Venn Diagram

Ranking Techniques

- Matrices
- Pairwise Ranking
- Card Sorts
- Preference Ranking and Scoring
 - Ranking by Voting

Participant Observation

- Participant Observation (do-it-yourself, learning by doing)
 - Direct Observation, Observation Indicator Checklists

Games

Photo Activities

- Aerial photos
- Still photos
- Videos

Others

- Options Assessment
- Seasonal Calendar/Daily Timetable
 - Forced field analysis
 - Mobility Mapping
- Historical Seasonal Calendar
 - Calendar
 - Time Trends
 - Historical Profile
 - Livelihood Analysis
- Flow/Causal Diagram
- Systems Diagram
- Semi-structured interviewing
 - Mini-surveys
 - Oral Histories
 - Stories
 - Case Studies
 - Proverbs
- Local Categories and Terms, Taxonomies, Ethno-classifications

Because many of these methods are visual, they can be used by those who are illiterate or low-literate, which encourages the participation of ALL.

Two key strategies for the use of PLA methods include having a multidisciplinary team and practicing triangulation.

A multidisciplinary team is composed of representatives of both sexes, different sectors and different disciplines. This kind of team ensures that all viewpoints are represented.

Triangulation refers to using diverse sources of information and different techniques of data gathering to achieve a high level of accuracy.

3. **Sharing of information and experiences is a key element of PLA and takes place on several levels:**

- Local people sharing information amongst themselves
- Local people and outsiders sharing information with each other
- PLA facilitators sharing information amongst themselves
- Organizations conducting PLA sharing experiences with each other.

Groundwork: Participatory Research for Girls' Education

Washington DC: World Bank. Eileen Kane. 1996, 35 minutes

Participatory rural appraisal (PRA) describes a family of participatory approaches and methods that emphasize local knowledge and enable local people to conduct their own appraisal and analysis, and make plans for development activities. PRA uses group exercises to facilitate information sharing, analysis, and action among stakeholders. Although originally developed for use in rural areas, PRA has been employed successfully in a variety of settings.

This video tells the story of how PRA exercises were used in a real life girls' education project in the Gambia. The film shows us what participatory research and action is and how it is used in the education sector. It also shows how outside researchers can help a community analyze its own problems and achieve viable results in terms of tackling the problems associated with girls' education.

Questions to ask yourself:

- How is the PRA approach shown in this video useful?
- How can participatory research be used in the project cycle, and as part of a larger education project?
- How can gender relations be impacted through the use of PRA?

BASIC EDUCATION STRATEGIC OBJECTIVE II (BESO II) COMMUNITY-GOVERNMENT PARTNERSHIP PROGRAM IN EDUCATION

I. Background

The Basic Education System Overhaul I (BESO I) was a seven-year (1994-2001) cooperative effort of the Government of the Federal Republic of Ethiopia (GFDRE) and USAID to improve the quality and gender equity of primary education in Ethiopia. The BESO I implementing partners were Academy for Educational Development (AED), Save the Children U.S.(SCF/US), Tigray Development Association (TDA), and World Learning, Inc.(WLI). The Community School Grants/Activity Program (CSGP/CSAP) was one component of BESO I and was implemented in the Tigray region and Southern Nations Nationalities and Peoples' Region (SNNPR) in partnership with regional and lower level government structure staff. Its aim was strengthening the capacity of School Management Committees (SMCs) to enable them manage their own educational development. TDA implemented the CSGP in Tigray region and WLI implemented the CSAP in SNNPR. Under a Federal restructuring and decentralization of education in Ethiopia in mid 2002 (after project design had been concluded and implementation had begun), SMCs were disbanded and replaced by newly established Parent Teacher Associations (PTAs) and Kebele Education and Training Boards (KETBs) at the community level.

The objective of BESO II (2002-2007) is similar to that of BESO I: Enhance Quality and Equity in Primary Education. In BESO II, there are different contractors and grantees. The principal ones are Academy for Educational Development (AED), SCF/US, TDA, and WLI. The contractor, Academy for Educational Development, works to improve teachers' capacity and teaching-learning methods, strengthening efficiency of educational management, distribution and logistics of educational materials, enhancing personal and professional support for women teachers, and improving monitoring and evaluation. The three grantees, SCF/US, TDA, and WLI, are implementing BESO II/CGPP. In BESO II, USAID has expanded its support from two regions to eight regions for the CSGP/CSAP, now called the Community Government Partnership Program (CGPP) in education. In general, "quality" refers to the efficacy of the teaching and learning process, and "equity" refers to the special needs of underserved and disadvantaged populations with specific reference to girls and pastoralist populations.

Save the Children-US (SCF/US) is implementing BESO II/CGPP in Afar, Gambella, Oromiya and Somali regions; TDA in Tigray region; and WLI in Amhara, Benishangul-Gumuz and SNNP regions. Working with 3,700 project schools, communities and government partners to strengthen local capacities at school, community and decentralized government levels, CGPP allocations among the implementing partners are broken down as follows: TDA -- 400 schools, SCF/US --1500 schools and WLI --1800 schools. In addition, the BESO II/CGPP program supports flexible education for children in disadvantaged circumstances.

The broader CGPP implementation strategy seeks to improve quality and equity in primary schools through increased community participation and support of the school's educational program. It is being accomplished through newly established PTAs, KETBs, and increased participation at the school level by parents, community members and other external government and community bodies. However, CGPP does not provide pedagogical support (curriculum, textbooks, pre-service and in-service teacher training, etc) to individual schools or government agencies. Nor does it provide institutional-strengthening support for educational administration (e.g.. in areas such as personnel management and budgeting). Such support is the responsibility of another BESO II implementing partner.

II. Cultural Background

Ethiopia is culturally a patriarchal society that accords a lower position to women as compared to men. Institutions generally, including schools, reflect these values, which have an impact with respect to providing equitable access to boys and girls inside the classroom. Many teachers, educational administrators and government officials are not aware of, or are indifferent to, gender issues and have not the knowledge or skills to treat both sexes equally. Girls don't get the same familial support to attend and are much more likely to be withdrawn or to have spotty attendance because of household responsibilities – typically, girls have significantly more demanding chores than do boys. And when girls do attend school, the school infrastructure often does not invite active participation, and girls do not typically get the same attention from their teachers. For example, teachers usually call on boys during classroom instruction much more than on girls. Though girls and women constitute an equal percentage of the population, they are under-represented in primary school and continue to perform at a lower level.

Although the legal marriage age is 18, in reality early marriage (generally around the age of puberty, although in some cases involving girls as young as 8) is a common practice among many rural communities of Ethiopia. Some regions have a higher prevalence of this practice than others. Early marriage, formally arranged, is more common; abduction is also quite prevalent. In neither case do girls have much choice in the matter. Marriage almost invariably results in the end of a girl's education.

Several additional factors contribute to the low participation of girls in primary education, for example, harassment and bullying, need to care for younger siblings, rape, household chores that get increasingly demanding as girls get older, and the fact that very often girls can't address their hygiene needs in the school environment.

III. Girls' Education Advisory Committees

Efforts towards Education for All and improved equity in education demand particular attention to the needs of girls, who historically have been left behind. CGPP's core gender strategy, the implementation and expansion of Girls Education Advisory Committees (GEACs), builds on a strategy that was developed by the pioneering innovation of local community members under the Basic Education Systems Overhaul

(BESO I): Community School Grants/Activity Program (CSGP/CSAP) a Girls Education Advisory Committees, and looking at the success of GEACs, a number of other schools have been instituting GEAC on their own, and other woredas (districts) have been mandating their implementation.

A Girl's Club and a GEAC are not one and the same. A club normally works within the school, but has little structural linkage to teachers or adults in the community at large. On the other hand, a GEAC works to transform the whole community as a supportive agency for girls; GEACs work to create a more positive environment for girls at home and at school by changing behavioral patterns through awareness raising training and by implementing a wide range of projects, each with a specific goal that is designed (a) to enable girls to stay in school, (b) to reduce the likelihood that they will drop out, and (c) to encourage girls to return to school if they do drop out. GEACs recognize that educating girls benefits the entire community and that it is worth the effort to educate girls, parents and community members in the individual, familial, and societal benefit from girls having greater opportunities to stay in school and learn.

GEACs have several variations but common elements include participation by a number of female students (7 – 10) along with a female teacher who serves as an advisor, other female teachers, and, depending on the communities, one or two mothers. Some GEACs also have male student members. The students serve as linkages to the whole school population and especially girls, to report on issues of concern (like early marriage, abductions, harassments etc) to them. A vital element of the success of a GEAC is that it focuses on the specific needs of girls of varying ages at the specific school. It is this body and especially through the female teacher advisor, that information about serious threats to the health and safety of girls is reported to the School Director and the PTA. It is the PTA that decides on courses of action that may lead to discussions with community elders, parents, religious leaders and the government authorities. In addition, as noted below, a broad range of activities to support girls is undertaken by GEACs.

A. GEAC Purpose and Objectives

In sum, Girl's Education Advisory Committees (GEACs) function to:

- create an environment conducive to discussing and solving problems that girls face in school, at home, and in the community;
- create a school environment where information on sexuality, sexual abuse, sexual harassment, gender discrimination, reproductive health, and sexually transmitted diseases are discussed openly and are carefully addressed in the context of the girl's age and understanding;
- assist girls in participating fully in schooling by making sure they attend regularly and strive to achieve to their full potential;
- create a school environment where girls are treated equally to boys in all ways and are given the same opportunities;

- increase awareness among parents, administrative bodies and community members about the issues girls face and to encourage their positive and active involvement in the successful participation of girls in schooling.

B. Examples of Activities and Strategies

The following are some of the approaches that GEACs in the context of the community and the educational authorities undertake with respect to the education of girls.

1. Classroom and school level

- Calling mothers meetings to discuss on education of their children (boys and girls)
- Calling community meeting to discuss on education of their children
- Holding a consensus-building community meeting to arrive at common understanding and make decisions to improve education of their children especially girls.
- Recruit female students as class monitors
- Enrichment learning sessions
- Identifying and implementing ways to ensure that girls do not drop out of school due to the lack of sanitary supplies
- Encouraging male students to be supportive of girls' schooling
- Establish study clubs within villages
- Prevent boys from teasing or harassing girls. Targeting boys for awareness raising regarding the equal status of girls access to and success in education
- Use of role models from among the communities (if any) to encourage performance of girls' in schools
- Encourage teachers to call on girls as well as boys to answer questions
- Encourage teachers to praise both boys and girls for correct responses
- Encourage teachers to give awards to successful girls as well as to successful boys
- PTA and KETB made requests for Woreda Education Office (WEO) to recruit and assign female teachers

2. District (Woreda) level

- Enforcing legal actions in collaboration with government bodies and law enforcement agencies;
- Winning the commitment of civic, traditional and religious leaders to advocate schooling of girls and get their support.
- Encouraging recruitment and selection of female teachers;
- Supporting establishment of non-formal learning centers to provide flexible alternative basic education in areas where there is low enrollment of girls'. Experience shows that the gender gap in enrollment becomes narrower as schooling become flexible and learning centers become closer to villages.

- Organize experience sharing between schools on their achievement, and on advancing girls' education (experience of Girls' Education Advisory Committee)
- Networking with other government and non-government organizations to promote girls' education in the Woreda
- Providing in-service teachers training to improve girls' education
- Establishing local funds to support Woreda level initiatives.

3. Regional level

The gender gap in access to and success in primary education is likely to continue unless efforts are taken at higher level too. This is what necessitates the regional level strategy.

- Making schools available in a reasonable walking distances from children's homes, including education at the next level to enable girls to complete primary education close to their home
- Making quality and equity linked issues for maximum impact
- Establishment of a unit in the Regional Education Bureau (REB) to coordinate efforts of Woredas
- Setting targets for WEOs to improve achievement and attendance of girls and provide incentives
- Organize competitions among schools and provide incentive for successful performance in improving girls' education
- Establishment of funds to advance girls' education

IV. Some Stories of Successful Performance

A. Benishangul-Gumuz Region

In Benishangul-Gumuz, as in many other regions in the country, girls are put to work at an early age. They fetch water and firewood, care for younger siblings, prepare food, and get married at a very young age. Convincing community members to send girls to school is a practical challenge BESO II CGPP has faced in the region.

Benishangul-Gumuz had scored lowest across regions on the gender parity index in 2001/2002 according to a report of the Ministry of Education (MOE). The parity index was just under 0.6, compared to 0.9 for Amhara and 1:0 for Tigray in 2001/2002.

The parity index varies from Woreda to Woreda in the region. In Mao-Komo Woreda the gender parity index was less than 0.3 in 2001/2002. This indicates that the gender gap between boys and girls was very high in Mao-Komo, with more than twice as many boys as girls enrolled in school. It was with these challenges that WLE/BESO II CGPP started in the region.

The first step of the intervention was for the School Development Agent (SDA) to meet with community members on the education of girls to discuss how the community members could benefit from sending girls' to schools. At first, the community members were not interested in discussing the issue of girls' education. In fact, some community members were uninterested in coming to the community meeting.

To break this silence, developing local strategies was necessary. The strategy developed and used was to convince elders, tribe leaders and religious leaders on how parents could benefit from sending their daughters to school. After long and continuous discussion, they were convinced and agreed to send their daughters to school. Some tribal leaders started sending their daughters to school and telling the community members that an educated girl could even become a teacher, doctor, or government official and could also provide better support for her parents.

When the tribal and religion leaders started advocating with community members, community members started to show willingness to send their daughter to school. Today, community members of Mao-Komo and other Woredas in Benishabgul-Gumuz Region are sending girls to schools. Many married women have returned to school themselves and are continuing schooling. In a year of intervention, the number of girl students has doubled in some CGPP schools. In the lower grades, the ratio of girls to boys is nearly 1:1. For example, in Tongo and Wanga primary schools, the ratio of girls to boys is nearly 1:1 in grades 1 and 2.

B. Amhara Region

Early marriage is one of the major challenges affecting girls' schooling in the Amhara region. Christians and Muslims coexist in Guangua Woreda, Awi Zone, Amhara region as in other areas. As a result of sensitization against early marriage, Christian communities decided to abandon the practices and established local rules against this practice. Communities have agreed to penalize a parent who violates this rule (married off his/her daughter before the age of maturity and without her full consent).

C. SNNPR

Examples of successes from the Southern Nations, Nationalities and Peoples' Region include

- A young girl in Abele School, Kochere Woreda, SNNPR, was rescued from an attempted forced early marriage and now is continuing her education with GEAC, PTA and KETB follow-up. Another girl in Abele school was persuaded to cancel an engagement she made willingly through counseling and advice given to her and her parents.
- A girl student returned to Hafersa Worabi School in the Yirga Cheffe Woreda of SNNPR, after her parents were convinced to give up an arranged marriage of their daughter. They also returned the dowry they had received as part of the marriage agreement.

- A mother whose daughter is studying in Shamena Gudo School in Boricha Woreda of Sidama Zone, SNNPR initiated a marriage arrangement against the will of her daughter. The daughter took the problem to the school's Girls Advisory Committee. The Girls Education Advisory Committee went to the mother and convinced her of the consequence of forced marriage on the rest of her daughter's life and explained the importance of educating her daughter. On the day when elders came to her house for the final arrangement to give the dowry, the mother told them that she had changed her mind and refused to accept the marriage because she had become aware that it would be better for her daughter to continue her education than to get married early.
- Members of the GEAC in one Sidama town got to hear of plans made by a girl's brother to allow her to be abducted and forced into marriage. They met with the girl's family and with other community leaders, including the head of the kebele. The head of the kebele agreed to take the girl into his personal protection, within his own household. Because of the strong social sanctions that would have resulted had efforts to force the girl into marriage gone forward under such circumstances, the girl was enabled to return to school safely.

D. Oromia Region

1. The case of Amane Haje

Thirteen year old Amane Haje is a grade 6 student at Hate Handode primary school, Hitosa woreda, Arsi zone. Her father is a very sick man. Her mother is the one who is providing for the family. Up until November 2003 Amane was peacefully following her education. But soon after, her aunt from her mother side passed away. According to the local culture, when a man loses his wife, he is entitled to marry his sister-in-law or the next keen. This type of marriage "Benebetto" is practiced in some parts of Oromia region.

Amane's deceased aunt, 85 years old husband asked her hand in marriage since there was no one next in line that he could marry. Her parents who are economically weak agreed to the marriage. As soon as Amane learned about the arrangement she informed GEAC member teacher Ato Diriba and asked for help. Ato Diriba immediately notified the PTAs about Amane's predicament.

The PTAs and the GEAC members proceeded to talk to Amane parents. They explained the physical, emotional and psychological harm that they would cause their daughter if they went through with the marriage. They stressed that if Amane discontinued her education it will not be in her best interest or her family's. The parents were not convinced. Hence, the PTA resorted to notify the local police officers for legal protection which they provided. After repeated discussions and negotiations, Amane's parents agreed to cancel the wedding and declared to have regretted their action a great deal; they asked their daughter's apology.

In the recent BESO II/CGPP school development week where community members of Hate Handodo convened, the case of Amane Haje was one of the main points of discussion for sensitizing people on the barriers of girls' education. Currently, Amane is in school and the GEAC and PTA in collaboration with the teachers' are trying to provide her with the necessary educational materials.

2. Teacher Sharbu Fogalo

Ato Sharbu Fogalo is a 44 years old teacher at Shorema Kerrera primary school, Hitosa woreda, Arsi zone and member of GEAC. Father of six, Ato Sharbu teaches grades 5-8. In January 2004, because of shortage of teachers Ato Sharbu was assigned to teach grade 3 as well. Shortly after, grade 3 student Rediya Rabo along with other 10 students stopped coming to class without any notice. This lasted for several days. Informing the rest of GEAC members about Rediya's case, Ato Sharbu took the responsibility to follow up.

Ato Sharbu said, "I have great respect and love to women because I was raised by my four sisters who sacrificed a lot for my education. Therefore, in school, I try to put extra effort for my girls' students since I know what hardship they go through. And when I observed the continuous absence of Radiya from class, who is a good student, I promised myself to help her in anyway I could."

After school hours, the first thing Ato Sharbu did was go to Rediya parent's house which is located approximately 3km away from the school. He wanted to try and reason with her family. However, since he recently had been transferred to the Hitosa woreda, neither her family nor her neighbors were willing to talk to him. Her family was rather puzzled by the fact that a stranger was so preoccupied by their daughter's life. When it became clear to teacher Sharbu that he was not succeeding in finding out why Rediya had dropped out or convincing her parents to send her back to school, he requested his colleague's assistance, teacher Amane Befitu, a native of Hiteso woreda. Together they patiently begun visiting Rediya's house and tried to convince that Ato Sharbu's only intention was to see the girl going back to school and continue her education. They even pleaded with Rediya's neighbors to try to convince Rediya's parents to change their mind. Finally all their hard work and persistence paid off. Radiya's parents who prevented her from going to school because she was much needed in the house to do the chores, agreed to send her back to school understanding that in the long run her being in school would benefit the whole family.

Presently, Radiya is back in class and the school has made extra efforts to accommodate her by arranging tutorial class so she could catch up her one month absence. Today she is a very happy girl. She even managed to convince her elder sister who dropped out of school a few years back to continue her education. Her elder sister submitted successfully her application to Radiya's school. She will be back in school by next academic year. Out of the 10 remaining dropout students from grade 3, the GEAC in collaboration with PTAs were able to bring back 5 more students to school.

#3. The case of Meseret Anegecha

Fourteen years old Meseret Anegecha is grade 3 girl student of Tajab Primary School in Dawo wereda, South West Shewa. The month is December 2004; harvest time for many Teff (country's staple grain) growing areas such as Dawo wereda and also popular for number of marriage proposal and ceremonies to take place. Incidentally the failure and success of the harvest is usually directly associated with scale of marriage in a community in a given period. It is in this same month that Meseret along with six more girls' from Tajab schools were proposed to and accepted by their parents despite the children furious protest.

The GEAC began its lobbying work by contacting the parents of the girls and tried to change their mind without success. The committee even involved the wereda education officer and Women Affairs bureau in the campaign but it did not bring them closer to their goal of stopping the marriage.

GEAC as their last option approached the groom and discussed with him telling him Meseret first of all did not want to marry him and that she was also underage and lastly that his action would not be legally or morally right either for him or her.

The day for "Sedeta" - cultural practice of the area where the groom goes to his future wife home and give the dowry money to her parents arrived. And on that day it is a customary for the bride family to prepare a feast for the groom. And Meseret parents went ahead and prepared a big feast by slaughtering their finest cow and inviting many relatives and friends. The groom failed to show up, everyone was surprised and shocked to learn that the groom did not come; especially Meseret's father who could not comprehend the outcome. Finally a few people were sent to the groom house to ask him why he did not come. He said that he was very much persuaded and touched by the committee's argument that forcing very young girls' into marriage and disrupting their education is indeed a crime and because of that he does not want to marry Meseret. Meseret's father was finally forced to accept the situation and he finally agreed to his daughters request to continue her education.

4. Makeda Kemale, age 14

Makeda Kemale grade 7 student in Birketu primary school from Hitosa woreda, Arsi zone, Oromia; comes from a family with three girls' and seven boys. Parents choose to sacrifice their girls' education for the benefits of educating their boys because of lack of recognition that girls' need education in order to assume their place in the various sphere of society.

Thus, it was a welcome request when a man asked Makeda's hand for marriage which her parents gladly accepted but which left Makeda shattered. She said, "*All I wanted was to finish my school, go to university and support my family.*"

But this time, thanks to CGPP, Makeda was able to escape from her preordained life. In Makeda's arranged marriage case, it was the GEAC with the help of the school director and few community elders who had agreed to stand by the school campaign of advocating girls' education intervened to stop the marriage. The school director said, *"At first, it was very hard to convince Makeda's parents, but, due to the unrelenting effort of GEAC member who visited Makeda's house to talk to her parents and their strategy to involve the community's respected elders in the dialogue, we were able finally to stop Makeda's marriage. It is really a good thing to see that we were able to help Makeda. I wish we can always be successful."*

Makeda is now very relieved and happy to be able to continue her education. She said, *"I am really happy that this committee is established in our school otherwise I would have been married like many of the girls' I know and going to university would have been just a dream."*

E. Afar Region

1. The case of Dubti Farm 1 Girls' Club Effort

Fatuma Jember who lives in Dubti Farm 1 wereda, in Afar, is a grade 6 student at Dubti Farm 1 Primary School who throughout her primary education was a very good student who stand either first or second in her class. She is also the secretary for the school girls' club.

Fatuma said, "I am very happy that girls' club has been introduced in our school and that I am the secretary of the club." She said, "We established the girls club this year on January with the help of our teachers."

"The first thing our teachers' did when the girls' club established back in January 2004, was introduce to us, students about the aim of the club and what it does" said Fatuma. Little did Fatuma know that the establishment of this club would be responsible to change the path of her life?

One day in school, Fatuma came to learn from her classmates that her marriage has been arranged and that same day as per the custom, elderly men will come to her home to officially ask her hand for marriage. Fatuma said, "I was very sure that this is unfounded rumor that this cannot happen to me and told my friends not to spread lies."

"However, when I reached home, the minute I entered, I knew because wet green grass were spread all over our home; a sign of festivity. And I asked my mother the reason for the grasses but she could not give me straight answer then I knew and began to cry. And surely enough, three elderly men came to our house that afternoon and put the request of the groom to my parents which my parents accepted. And the men measured my finger by a trade for the ring and told my parents that soon, I need to go to my future husband house and live there till my wedding day."

Fatuma said, "After the men left I tried to talk to my parents, plead with them that they know that I am a good student and that I strongly want to continue with my education but nobody was ready to listen to me. My mother biggest argument was the recent case she heard about a student in Dubti who got pregnant out of wedlock. My mother is worried that if I continue going to school I could also get pregnant before I am properly married and bring shame to the family. Therefore, nothing I said or did could convince my mother. After that for about a month I cried a lot, did not eat well, my mother sometimes tired to console me and sometimes she will shout and bit me so that I can accept the marriage which I refused throughout."

V. Initiatives of Girls' Education Advisory Committees in Support of Girls

GEACs in many schools have succeeded in establishing income generation mechanisms to support the continued schooling of poor female students:

- Establish Tea Clubs to raise money for needy girls and GEAC activities
- Teachers collect nominal monthly fees (2 birr a month) for students without necessary materials, which can vary from stationery to health and hygiene supplies. Contributions come from teachers, students, and parents. Women Association can contribute substantial amounts.
- GEAC encouraged mothers to donate case and materials.
- Putting on a play/performance to collect money in donations afterwards. (Theme of play: the life of a female student who was forced to marry and as a result stops schooling.)
- Establishment of a school shop: GEAC coordinates contribution of money from initial capital to establish the shop, income generated from shop goes to needy girl students.
- Make handcrafts to sell during parents day
- School clubs make things to be sold and the GEAC uses this money
- Create a garden to grow vegetables for sale
- Have a raffle on parents' day.

In addition to these activities, members of GEACs (both students and teachers) keep an eye out for girls whose attendance appears to be slipping and consult privately with the girls and their families as to the causes. After ascertaining the apparent reasons, the GEAC members identify possible solutions. Depending on the reason, these can include advocating with the parents to forestall early marriage, arranging remedial tutoring, seeing if household workload can be rearranged, etc., as the case may be. In some cases, such as harassment, the GEAC members, PTA members, and/or other respected community members will also have discussions with possible culprits.

VI. Capacity-Building Support and Institutionalization through CGPP

Girls' Education is one of the CGPP priority issues. In all training and workshop activities, CGPP implementing partners staff discuss the issues as in the material below.

The institutionalization attempts are also getting momentum as some Woredas are in the process of scaling up the GEAC in all schools and forming units at Woreda level. The following are examples of capacity building activities undertaken in BESO II CGPP training.

Activity 1. Identifying the problems

Discussion questions (generic)

1. What are the problems of Girls in Primary Education in your school/Woreda/Zone?
2. List all problems related to girls' education and discuss their impact on enrollment, attendance and achievement of girls in primary schools.
 - What is the Enrollment Rate for girls and boys in your school/ schools in your Woreda? Is boys' enrollment higher than girls or vice versa? Why?
 - Which group (boys or girls) becomes absent from class most of the time? Why?
 - Which group (boys or girls) achieve better in schools in your Woreda/Zone? Why?
 - Do you think that girls are less intelligent than boys? Why?
 - What is the dropout rate for girls and boys in your school/schools in your Woreda/Zone? Why?
 - What can you do to solve the problems of girls' education?

Activity 2: Towards solutions

Questions for discussion (specific)

- As an education official, what is your target for the next years to raise enrollment and achievement of girls' as equal to boys? What is your plan to reduce dropout?
- What can the PTA and KETB do once the school administration or headmaster informed them about the poor participation and performance in school compared to boys? What type of technical support can the Woreda Education Office (WEO) provide to PTA and KETB to improve girls education?
- As an education official, have you ever received from schools plans to improve girls' achievement/performance? What kind of support have you provided to them in this regard?
- As a leader in the educational system, do you think that teachers are aware of problems that girls' face in school? Are they willing to organize tutorial classes and enrichment learning to support girls? Do you encourage them to do so?
- As a teacher, do you try to call on girls to answer questions? Have you ever thought that calling on girls in front of the class to answer questions can

encourage their participation in class or denying them this opportunity can discourage them? What can you do about this?

Discussion Guides and Examples

Discussion with parents (mothers and fathers) on what they can do at home for their daughters to attend school regularly and have time to study at home?

Example (1): It is a fact that girls have higher workload at home than do boys; reducing the workload can be one strategy so that they can have time to do homework and study as their brothers.

It is also important to discuss with male children in the community regarding their perception about girls' education. Are they supportive of the idea of sharing the workload and doing some of what girls are expected to do at home and outside? Try to get the support of girls' brothers for maximum impact.

Example (2): Most rural girls are married off at an early age while in primary schools. Discuss this with parents to postpone such requests and encourage girls to report such cases to GAC and PTA/school.

Example (3): Working closely with teachers and discussing the achievement/performance of girls can lead to an action that will help overcome the problems. Such actions can be winning their commitment to organize tutorial classes out of school hours.

Activity 3: What you may do after this workshop/training program in your school

- Try to find answers to the above questions together with your colleagues in school.
- Write down the answers for yourself and then share it with your friend
- Invite other people (teachers, parents (mother and fathers), school headmaster and community leaders and students) and build consensus on the solutions.
- Develop plans to improve girls' education in your school. Choose from the menu of strategies or include your own to this list. Implement, follow-up and monitor results.
- Evaluate the success and share your findings with other colleagues in other school/Woreda.

Gender Equality in Education Framework

Gender equality is an often used but infrequently defined term. The Office of Women and Development and the EQUATE team have been working on a framework that USAID education staff can use to increase the level of gender integration in their programs. To be practical, this framework must draw clear distinctions and demonstrate interrelationships among the concepts of gender parity, gender equity, and gender equality. In addition to drawing out the nuances between “equity” and “equality”, the framework also reinforces other key issues in education such as access, quality, continuity and relevance.

Gender equality means that men/boys and women/girls have equal opportunities to realize their full human rights and contribute to and benefit from economic, social and cultural, and political development. Parity and equity are the building blocks to equality in education. As noted in the EFA Monitoring Report for 2003/2004, “gender parity and gender equality in education mean different things.”¹ Parity is attained when the same proportion of boys and girls—relative to their respective age groups—enter the education system, achieve educational goals, and advance through the different cycles.² Reaching parity in enrollment is necessary but not sufficient for achieving equality and should be considered a “‘first stage’ measure of progress towards gender equality in education.”³

Equity is the process of being fair to girls and boys. To ensure fairness, measures must be available to compensate for historical and social disadvantages that prevent girls and boys from operating on a level playing field. Equity does not imply treating all learners the same, because there are many factors that might disadvantage some learners in achieving equitable outcomes. Responses may include “equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations and opportunities.”⁴ Equity mechanisms such as scholarships have been used to achieve gender parity in enrollments. Additional equity tools such as math and science camps for girls have been implemented to increase achievement. Equity strategies are needed to eventually attain gender equality over the long term and must be reflected in policies and practices directed toward learners, teachers, and the community. Monitoring progress toward achieving gender equality is equally important; measuring changes over time requires that data be disaggregated by sex.

An effective strategy for educating girls needs to include attention to parity and equity simultaneously. As noted in USAID’s Education Strategy: “As a matter of policy, USAID places major emphasis on females’ access to basic education. In all cases,

¹ UNESCO. 2003. *Education for All Global Monitoring Report 2003/4: The Great Leap to Equality*. Paris: UNESCO.

² Ibid.

³ Subrahmanian, Ramya. 2003. *Gender Equality in Education: Definitions and Measurements*. Background paper for UNESCO GMR 2003/2004. Paris: UNESCO.

⁴ ILO. 2000. *ABC of Women Worker’s Rights and Gender Equality*. Geneva: ILO.

USAID emphasizes educational equity for girls and women as a strategy for achieving educational equality for all.”⁵

The Relationship between Quality and Equality

Achieving parity in enrollment remains a critical objective and is fundamental to gender equality. However, focusing on access as the primary issue for girls can undervalue the importance of quality and relevance, with the false conclusion that what happens in the classroom need not be analyzed for possible differences in girls’ and boys’ opportunities and experiences. Some of the more traditional approaches to increasing parity in enrollment may treat only the symptoms, not the root causes of inequality. Striking a balance between equitable access and quality and relevance as expressed in USAID’s Education Strategy is one way for USAID to strengthen its ability to provide a quality education to all learners.

For equality to have any meaning, the quality of education must be such that children actually do learn, and what they learn has relevance to their lives. The two concepts are inextricably linked, since an intrinsic characteristic of quality is greater equality of access and outcomes for all learners.⁶ Poor or marginalized children, who are more likely to have illiterate parents and less access to reading materials in the home, are more dependent on their teachers for their learning than are better-off children. As a result, poor instruction perpetuates inequities because it is more often the most marginalized children who become school leavers, either through failure or dropping out (voluntary termination). Research has shown that girls seem to be more sensitive to school quality than boys and that the quality of teachers has a greater impact on the demand for girls’ education than for boys’.⁷

Another important dimension of quality is relevance. Relevance refers to the degree to which the education provided is applicable and relates to learners’ present and future. Too often education fails to prepare students for the contemporary labor market and adult life. There are insufficient training opportunities for youth to meet the needs of the private sector and the global economy by either gaining the skills needed to earn an income or becoming self-supporting.

The Multiple Dimensions of Gender Equality in Education

This section will build on work begun by UNESCO for the 2003/2004 EFA Monitoring Report, *The Leap to Equality*.⁸ The four main dimensions to gender equality as outlined in the EFA report have been adapted to the USAID context to include:⁹

- Equality of access;

⁵ USAID. 2005. *Education Strategy: Improving Lives Through Learning*. Washington, D.C.: USAID.

⁶ UNESCO, 2004. Op.cit.

⁷ Kane, Eileen. 2004. *Girls’ Education in Africa: What do We Know About Strategies that Work?* Africa Region, Washington, D.C.: The World Bank.

⁸ Subrahmanian. Op. cit.

⁹ UNESCO, 2003. Op.cit.

- Equality in the learning process;
- Equality of educational outcomes; and
- Equality of external results.

Implicit throughout the four dimensions is **equality of opportunity**. Two aspects of equality of opportunity, which inform the Gender Equality Framework, have been drawn from the work of economist John Roemer.¹⁰ The concept of equal opportunity holds the individual accountable for his or her own achievement. Secondly, society is expected to level the playing field so that all people can develop their potential attributes and are given a fair chance to succeed. Equality of opportunity in the Gender Equality Framework refers to providing both girls and boys with equal opportunities to go to school, learn, achieve and succeed as adults.

Below are brief descriptions of each dimension, accompanied by examples of equity measures implemented to contribute to achieving equality. The examples are primarily based on successful USAID education projects.

Equality of access means that girls and boys are offered equitable opportunities to gain admission to formal, nonformal, or alternative approaches to basic education. Actual attendance, rather than enrollment, is a better indicator of whether access has been achieved.

Interventions:

- Situate schools in close proximity to students' homes.
- Form girls' advisory committees in which teachers monitor girls' participation at school and intervene when necessary.
- Provide safe, private, and secure latrines.
- Raise the awareness of parents of their rights and responsibilities in education and of the importance of schooling for boys and girls.
- Reintegrate ex-combatants and other youth affected by conflict by providing nonformal educational activities that emphasize self-discovery, healing, health and well-being, democracy, good governance, and conflict management in addition to basic literacy and numeracy skills.
- Provide scholarships for children at risk, which can encourage better attendance while simultaneously raising the issue of the importance of education with parents and fostering more positive attitudes in teachers.
- Reach out-of-school children, such as boy herders, through radio instruction provided in distance teaching centers that includes not only literacy and numeracy skill building but also training in livelihoods.
- Train communities in monitoring access and quality through Parent-Teacher Associations and School Management Committees, and ensure that women are part of the management.

¹⁰ Roemer, John E. 1998. *Equality of Opportunity*. Cambridge, Mass: Harvard University Press.

- Improve the ability of schools to provide educational services through education finance mechanisms that increase spending on quality inputs such as textbooks, and decrease parental payments that may inhibit student attendance.

Equality in the learning process means that girls and boys receive equitable treatment and attention and have equal opportunities to learn. This means that girls and boys are exposed to the same curricula, although the coursework may be taught differently to accommodate for the different learning styles of boys and girls. In addition, all learners will enjoy teaching methods and materials free of stereotypes and gender bias, and have the same freedom to learn, explore, and develop skills in all academic and extracurricular offerings.

Interventions:

- Train curriculum developers, text writers, administrators, managers, and teachers in gender awareness prior to developing new curricula.
- Provide extramural activities, including sports, for both girls and boys.
- Where technologically feasible, introduce computer technology in primary and secondary schools using culturally contextualized software that is free of gender stereotypes and bias and is self paced.
- Train teachers in inclusive teaching practices to help them integrate students who have been marginalized due to poverty, ethnicity, language, or gender discrimination.
- Undertake annual classroom studies to monitor teachers' interactions with boys and girls.
- Include life skills programs for boys that allow them to talk about gender roles and provide them with more positive notions of masculinity.
- Institute policies to place indigenous bilingual teachers in the lower grades of primary school in indigenous-speaking areas; bilingual education in indigenous areas has been shown to be a cost-effective strategy for increasing enrollment and completion and decreasing drop out and repetition rates.
- Include training on psychosocial and trauma issues and on children's rights to better equip teachers to work with abandoned street children.

Equality of educational outcomes means that girls and boys enjoy equal opportunities to achieve and outcomes are based on individual girls' and boys' talents and efforts, not entitlements. To ensure fair chances for achievement, the length of school careers, academic qualifications, and diplomas do not differ based on a person's sex.

Interventions:

- Institute policies that encourage girls' participation in technical training.
- Promote an open-classroom system that encourages teachers to act as learning facilitators who foster democratic student government and student participation, ensuring that girls assume active leadership roles.
- End academic streaming based on gender stereotypes (for example, girls are often streamed into the humanities and boys into science and technology).

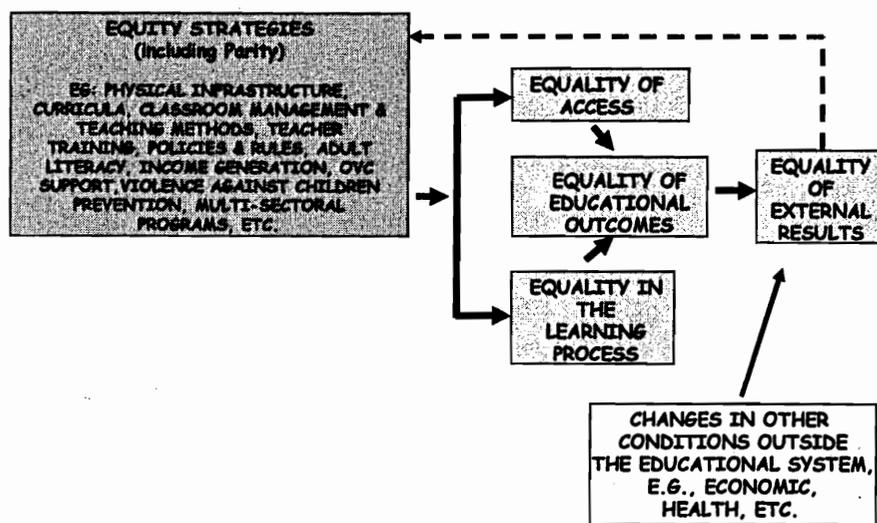
- Provide accelerated learning programs to help students whose education was interrupted by war or other hardships to achieve grade-level equivalencies and potentially re-enter the formal school system.

Equality of External Results occurs when the status of men and women, their access to goods and resources, and their ability to contribute to, participate in, and benefit from economic, social and cultural, and political activities are equal. This implies that career opportunities, the time needed to secure employment after leaving full-time education, and the earnings of men and women with similar qualifications and experience are equal.

The four dimensions of gender equality are related, but that relationship is complex and not necessarily linear. Parity in enrollment and greater gender equality in schooling can, and often do, coexist with inequalities outside of education. Several studies have demonstrated, in fact, that educational success for girls does not automatically translate into higher economic status or greater political participation as adults.¹¹ At the same time, improving opportunities for women in the labor market can give them the economic means to send their children to school. Achieving equality after learners finish their studies and enter the labor market requires interventions that go beyond the education sector.

The diagram below demonstrates the interrelationships among the different dimensions of equality.

Gender Equality in Education Framework



¹¹ SERNAM. 2004. *Mujeres Chileñas, Tendencias En La Ultima Decada*. Censos 1992–2002. Santiago: SERNAM.

Interventions:

- Provide leadership training for women.
- Enact and enforce labor laws that ensure equal opportunity.
- Conduct social mobilization campaigns aimed at increasing women's and girls' status and value in society.

Viewing programming options through the multiple dimensions of gender equality can generate new ways of thinking about education for all children. A perspective that considers the dynamics between males and females and their respective socioeconomic and political roles will produce better results in women's and girls' education. Such a perspective is also useful for understanding the dynamics that create either a positive or negative impact on the education of boys.

The Gender Equality Framework demonstrates that gender parity is not the only milestone against which success should be measured. Understanding how stereotypes limit the choices and opportunities for boys and girls and obscure their needs and differences will enable educators to create learning opportunities that contribute to the long-term outcome of equality through which all children flourish and reach their full potential.

Case Study:

Basic Education Program in the Republic of Freedonia

I. Facts and Figures

Background

The Republic of Freedonia is making the transition to peace following a decade of civil war. The civil conflict caused destruction, disruption of economic activity (especially agriculture and mining), and the collapse of public services, health and education. The war led to the displacement of two million people, half the country's population, and the death of over 20,000.

Full peace has been in place for two years but Freedonia's successful post-conflict recovery remains fragile. Some of the challenges for the new government include pervasive and deep poverty (70% the population is below the poverty line); dilapidated infrastructure; poor human resource development; and high unemployment (especially of youth and women). Some of the most pressing of issues facing the nation include the provision of support to war victims (the disabled, orphans, widows and widowers, and refugees) and the rehabilitation of ex-combatants.

The Status of Gender Equality

Women have disproportionately borne the burden of the country's economic and social decline. Sexual and gender based violence was used by armies as a principle wartime terror tactic. As many as 257,000 women and girls were raped or held as sex slaves during the war. Abducted women and girls were forcibly conscripted into rebel armies to serve as domestic workers, commanders' concubines, and combatants alongside men. Over 40% of young women returning to their villages have borne children out of wedlock.

Years of fighting have decimated Freedonia's health infrastructure. This has resulted in the highest infant and maternal mortality rates in the world. Maternal mortality is exacerbated by the high prevalence of forced early marriage of young girls and the high rate of teenage childbearing. At present, one in six women can expect to die during childbirth.

Approximately 65% of Freedonia's population is rural. Women perform the majority of the nation's subsistence farming and are responsible for 75% of food output yet few hold any rights to land. With little hope for employment outside of the home and limited opportunities to access formal education, most women are economically dependent on their husbands.

Today, most refugees and internally displaced people have returned to their homes. Most of the governments Disarmament, Demobilization and Reintegration (DDR) efforts have excluded women. Females have had little access to training, counseling services and other benefits offered under the DDR process.

The State of Education

The earliest youth combatants were pulled into war due to lack of educational opportunities and job prospects. With the establishment of peace, education was declared one of the

government's highest priorities. Nevertheless, the system is still in dire need of more teachers, supplies and learning materials.

- Since the end of war, children have begun to return to school. Recent data show increasing enrolment levels at the primary level. Nevertheless, enrolment rates are lower for girls than for boys (53% compared with 67%).
- The Gross Enrolment Ratio has nearly doubled to over 100% in 2003 as many over-aged children, who have missed out on schooling during the war, have entered school.
- The retention rate in the fifth year of primary school is estimated at 60% in urban areas, compared to a mere 15% percent in rural areas. It is higher for boys than for girls.
- Those under the age of 15 make up 44% of the population. Some 57% of children aged 5 to 14 are engaged in some type of child labor. High numbers of out-of-school youth continues to be seen as a threat to ongoing peace and stability.
- Between 10,000 and 20,000 children fought in the civil war. It is estimated that 1/3 of child-soldiers were female. Most of these children have never attended school.
- It is common for classes, especially in lower grades, to have a teacher/pupil ratio of 1:47 and for lessons to be held outdoors under trees.
- Some 50% of teachers are unqualified of which about 30% have never completed teacher-training studies.
- Children conscripted by armies were forced to commit atrocities against their own families or villages as a means of preventing them from returning to their homes. Many children suffer from war-related stress and have had difficulty readjusting to normal society. In the classroom this has manifested itself in learning disabilities and serious behavioral problems.
- There is still widespread fear amongst parents in rural areas about sending their children to school, especially girls.
- Adult literacy figures are amongst the worst in the world standing at 36%. It is estimated that only 51% of men and 23% of women are literate.

II. The Project

Given the current state of education, USAID/Freedonia has adopted the following 3-year Special Objective: **Improved basic education to advance the reintegration of war-torn populations.**

The Education S.O. Team has decided to achieve the Special Objective through a single project, the "The Republic of Freedonia Basic Education Support Program." This project is intended to

support the reintegration of returned refugees and child soldiers into the education system.) It will concentrate on increasing community participation in education and improving teaching skills to achieve objectives. Teachers will be trained to deliver the newly adopted life-skills curriculum and to provide some of the needed psychosocial support to children. Communities will be engaged in school management activities to help increase the value placed on education and reduce the stigma associated with being a former child soldier. The primary impact will be to increase the number of children attending school and improve the quality of learning for Freedonia's children.

Intermediate Results:

- IR 1: Improved access, retention and achievement
- IR 2: Improved quality of basic education through teacher training
- IR 3: Improved community participation in basic education

Performance Indicators

- Percentage increase in enrolment of children in primary schools in targeted districts;
- Percentage increase in passing rates of students in years 3 and 5 in targeted districts;
- Percentage increase in children completing primary school in targeted districts;
- Number of teachers trained in life-skills education
- Percentage increase of community involvement in school management

III. Questions for Discussion

- How does this project address the 4 dimensions of gender equality in education?
Consider:
 - I. Equality of access
 - II. Equality in the learning process
 - III. Equality of educational outcomes
 - IV. Equality of external results
- How could this project better respond to the gender issues identified in Section I above?

Steps to Integrate Gender in Activity Design and Planning

Much of the data required to conduct a gender analysis may have been collected during the preparation of a strategic plan. However, further analysis may be required to assess and approve individual activities. The factors to consider when conducting this analysis are discussed below.

Activity Design

Analyze Information on Gender Relations that Emerge from Technical Analyses

What does the information collected in customer surveys, technical analyses, and existing research and national statistics reveal about gender relations? Are there gender differences and gender-based constraints that are likely to affect the choice of strategic objectives and program outcomes?

Assess the Potential Impact of Gender-based Constraints and Opportunities

Technical analysis documents what resources are needed to carry out an activity, whether men or women control access to these resources and if gender-based constraints limit the availability of resources (e.g. de facto preferences for male inheritance). If the SO team's initial inquiries reveal gender-specific constraints to women's or men's participation in the activities, the institutional analysis should explore mechanisms for overcoming these constraints. In the social soundness analysis, the intersection between gender and other social categories in defining needs, activities, opportunities and constraints can help the operating unit pinpoint how gender relations in one group might guide choices among and within objectives and affect or be affected by project outcomes differently than in another group.

The task of the team during planning is to collect the information to answer these questions and to build the answers into the development hypotheses that frame the activities designed to achieve results.

Activity Planning

Activities designed to achieve the objectives of the strategic plan should also address gender issues in a manner consistent with the findings of the technical analyses.

Fulfilling the policy involves developing either:

- 1) A gender statement outlining key gender issues related to the activity or
- 2) A rationale explaining why no gender issues are considered significant to results achievement.

When gender considerations are built into the results framework, the development hypothesis itself leads to attention to gender as a factor in the design of activities, the selection of implementing partners, and the choice of indicators to monitor progress. Activities will take account of specific gender-based constraints, and indicators will be developed to gauge the impact of the activities on women's status and gender equity. Any additional technical analyses undertaken in the design of specific activities should draw on the insights about the relevant gender issues and relationships in the results framework.

At the activity level, as the analysis becomes more context specific, the analysis of gender relationships also should be more specific and translated into particular program components. For example, adolescent and middle aged women may differ in significant ways for design of a reproductive health activity; whether women are in landed or landless households may be key information in a civil society activity. The nuances introduced by the interactions between gender characteristics and other social characteristics should be given particular attention at this level of design.

Activity Approval and Pre-Obligation Requirements

ADS pre-obligation requirements now stipulate that gender considerations either be integrated into the statement of work (SOW) for a competitive contract solicitation (RFP) and the program description for RFAs and the Annual Program Statement (APS) or that operating units state in the Activity Approval Document that there are no significant gender issues.

There are no *a priori* standards by which to judge whether gender should be covered in the development of acquisition and assistance instruments, including Statements of Work and Program Descriptions. The best explanation for inclusion should be drawn from the technical analyses. Since gender analysis is a required part of the planning process, the extent to which gender issues need to be addressed in the activity should be clear, as should the priority given to them in the evaluation criteria. For example, if gender-based constraints are crucial to the results of the activity, it is essential that organizations competing for an award demonstrate a strong capacity to deal with these constraints.

The ADS does not prescribe specific technical evaluation criteria. The SO Team is responsible for identifying criteria that are relevant to the solicitation under consideration. A few examples illustrate the types of criteria Operating Units might use to evaluate proposals from contractors and NGO program descriptions. The Team might assign evaluation points to demonstrated experience on the part of the contractor or NGO in one or more of the following criteria.

Illustrative Evaluation Criteria for Assessing Gender Integration in RFAs and RFPs

For Program Implementation and Evaluation:

- Gender research, analyses, or assessments, and consultations with women's advocacy groups
- Gender equitable consultation and participation in all phases of activities
- Gender considerations in activity design, training, and procurement actions
- Sex-disaggregated data for indicators and target; gender criteria for assessment of activity progress and impact

For Institutional Capacity:

- Commitment to gender in previous contracts, cooperative agreements, or grants
- Gender-equitable policies and mission statements
- Publications on gender issues

For Staff Qualifications:

- Key personnel with demonstrated sectoral and gender analysis skills
- Position descriptions that require gender expertise, especially for leadership positions

In developing specific criteria for evaluating the applicant's plan to incorporate gender issues into assistance activities the Operating Unit should consult, to the extent necessary, with Agency gender experts for guidance on structuring the criterion to evaluate the proposed activity's socio-economic impact on women, differential effects on men and women, and methods for measuring these impacts. Since not every Operating Unit has the same level of gender technical expertise, this guide and its resource bibliography is designed to assist team members in asking critical questions that may identify the most significant gender issues. Keep in mind, particularly when using a performance-based approach, the team may also ask of bidders to propose, in their response to an RFA, RFP, or APS, their own perspective on gender issues and how they would address them during implementation.

It is the responsibility of the Procurement Officer to verify that the findings from the gender analysis are adequately reflected in the activity design or that the Team has prepared a written justification for why gender issues are not relevant to the activity. In general the Operating Unit should assume that gender is relevant to most development activities. Ultimately, the burden of proof for showing that gender considerations do not apply to a particular problem falls on the SO Team. In sum, the gender statement may include a combination of identified gender issues and questions to which the bidder is asked to respond.



Data Sources on Education

1. DHS EdData Publications - <http://www.dhsedata.com/>

DHS EdData is a USAID activity that provides accurate and timely data for the planning, monitoring and evaluation of education policies and program in developing countries worldwide. The data collected by DHS EdData complements and supports the information that is collected by national Education Management Information Services (EMIS).

2. Global Education Database - <http://qesdb.cdie.org/ged/index.html>

Global Education Database (GED) is sponsored by USAID's Office of Education. The GED is a repository of international education statistics compiled from the UNESCO Institute for Statistics and the DHS.

3. Human Development Report - <http://hdr.undp.org/>

UNDP's Human Development Report (HRD) presents a wealth of statistical information on different aspects of human development that can be accessed by country or by indicators.

4. UNESCO Institute for Statistics - http://www.uis.unesco.org/ev_en.php?ID=2867_201&ID2=DO_TOPIC

Global and international comparable statistics on education, science, technology, culture and communication. The site includes the latest internationally comparable education indicators for the years 1998/99 to 2001/02, now available electronically via the **UIS's Database** or in the form of **Statistical Tables**.

5. OECD Statistics Portal - http://www.oecd.org/statsportal/0,2639,en_2825_293564_1_1_1_1_1,00.html

The OECD Education online database provides international comparable data on key aspects of education systems.

6. Trends in International Mathematics and Science Study - <http://nces.ed.gov/timss/>

TIMSS, formerly known as the Third International Mathematics and Science Study, provides reliable and timely data on the mathematics and science achievement of U.S. students compared to that of students in other countries. Offered in 1995, 1999, and 2003, TIMSS provides *trend data on students' mathematics and science achievement* from an international perspective.

7. World Bank EdStats - <http://www1.worldbank.org/education/edstats/>

EdStats is a comprehensive education statistics database developed by the World Bank's Education Group of the Human Development Network in collaboration with Development Data Group in the Development Economics Vice-Presidency. It compiles data from a variety of national and international sources and provides information on key education topics.

8. World Bank GenderStats - <http://genderstats.worldbank.org/home.asp>

GenderStats is an electronic database of gender statistics and indicators designed with user-friendly, menu-driven features. It offers statistical and other data in modules on several subjects. The data in each module is presented in ready-to-use format.

9. Statistical Data Bank for the Asian Development Bank - <http://www.adb.org/statistics/>

One of the prominent sections available on this website, the Key Indicators is an annual statistical publication of the ADB. It presents the most current economic, financial and social data on the Bank's developing member countries. Since 2001, it also features a special thematic chapter.

10. Eldis Education Resource Guide - <http://www.eldis.org/education/index.htm>

ELDIS is a gateway to information on development issues, providing free and easy access to wide range of high quality online resources. ELDIS provides summaries and links to online documents. It offers a directory of websites, databases, library catalogues and email discussion lists.

11. Education Policy and Data Center - <http://portal2-ssdc.aed.org/EPDC/portal/cn/DefaultContainerPage/Home>

EPDC, founded by USAID and EDC, features Country Profiles that provide a quick overview and evaluation of education issues. EPDC Profiles are based on multiple data sources; provide sub-national data, education projections, and information on links with health and the economy.

12. Global Learning Portal - <http://portal2-ssdc.aed.org/GLPNetPortal/portal/cn/DefaultContainerPage/Guest>

The Global Learning Portal is dedicated to assisting teachers and educators improve the quality of education in developing and underserved regions of the world. GLPNet supports a wide variety of programs around the world. To reach teachers and educators, GLPNet relies on Partner Country organizations, and Sector Partners for different education topics.

13. Unicef Statistics Education Databases - <http://www.childinfo.org/eddb/education.htm>

Unicef provides key statistical databases, including this one on education, with detailed country-specific information that was used for the end-decade assessment, as reported in "Progress Since the World Summit for Children – A Statistical Review." Global and regional summary analyses and graphic presentations of the key results of progress over the decade are incorporated into the website.

14. UN Millennium Project - <http://www.unmillenniumproject.org/>

The UN Millennium Project is an independent advisory body commissioned by the UN Secretary-General to advise the UN on strategies for achieving the Millennium Development Goals, the set of internationally agreed upon targets for reducing poverty, hunger, disease, illiteracy, environmental degradation and discrimination against women by 2015. It highlights 8 goals, 18 targets and 48 indicators to measure progress.

Gender and Education for All THE LEAP TO EQUALITY

Regional Overview

Sub-Saharan Africa¹

EFA remains a great challenge in this region. Despite commitment to international treaties and declarations² by most of its countries, all education indicators are below world and developing country averages. Most children, more often girls, are still deprived of the right to education.

Early childhood care and education (ECCE): still a luxury for nearly all children

More than a third of the world's countries with available data (56 out of 152) have very low pre-primary enrolment (GERs of below 30%). Nearly half of them are in sub-Saharan Africa, where GER ranges from less than 1% in the Democratic Republic of Congo to 90% in Mauritius (see table).

ECCE is often provided by private institutions and is concentrated in urban and wealthy areas where parents tend to be more aware of its benefits and sensitive to the gender issue than rural ones. As a result, girls' access to ECCE is much better than to other levels of education. In some countries (Burkina Faso, Cape Verde, Comoros, Congo, Guinea-Bissau, Lesotho, Mauritius, Namibia and Zimbabwe) more girls are enrolled than boys.

Universal primary education: still a long way to go, especially for girls

Gender parity is closely tied to universalising primary education. But only 58% of children of the official primary school age were enrolled in 2000. This NER was the lowest of all regions and far below the 84%

world average. It meant 44 million children were not enrolled (more than 40% of the world total of out-of-school children), more than half of them girls.

Sub-Saharan Africa has low enrolments rates and strong gender disparities and inequalities. A third of the countries have GPIs of under 0.76 – Chad, Burkina Faso, Mali, Ethiopia, Guinea, Guinea-Bissau, Côte d'Ivoire, Benin, the Central African Republic, Mozambique and Liberia.

Gender disparities concern not only access to school but also participation in the learning process. Sub-Saharan Africa is the region with the highest repetition rate – more than 15% in half the countries with data. Unlike elsewhere, girls repeat more often than boys and the region is home to almost all the world's countries where this happens.

Survival rates to grade 5 in sub-Saharan Africa are lower than elsewhere, and it is the only region where they are higher for boys than girls, notably in Guinea-Bissau, Malawi and Mozambique.

An education pyramid much narrower at higher levels with bigger gender disparities

Access to secondary and tertiary education is still limited to a minority and half the countries show gross enrolment rates of no more than 26% for secondary and 2.5% for tertiary. Participation is often the privilege of boys and young men. Gender disparities in primary

¹ This is the EFA classification of regions. The countries in sub-Saharan Africa are listed in the Table.

² The first was the 1948 Universal Declaration of Human Rights, which acknowledged the right of all to education and stated that elementary education would be free and compulsory and higher levels of education accessible to all on the basis of merit.

education increase with the level of education although girls' participation in secondary rose during the 1990s, as in all developing countries, with strong gains in Malawi, Niger, Rwanda and Sierra Leone.

In tertiary education, girls are not only much less represented (fewer than five girls to 10 boys) but often confined to so-called "feminine" fields, such as social sciences, humanities, services and health-related courses, that do not boost their chances of equal job opportunities with men. What men and women choose to study is a key issue in the debate about gender equality. In this region the first step towards it is to guarantee gender parity in access to and participation at all levels of education.

The right to education: also a concern for adult women

Sub-Saharan Africa has one of the world's lowest adult literacy rates, with only 60% of the population of 15 and over able to read and to write in 2000, well below the world average of 80%. The figure was below 40% in Benin, Burkina Faso, Ethiopia, Gambia, Guinea-Bissau, Mali, Niger and Senegal. Women account for nearly two-thirds of the illiterates, a figure not expected to change much by 2015. Most countries show substantial gender gaps, with female literacy no more than half that of males in Benin, Burkina Faso, Guinea-Bissau, Mali, Mozambique and Niger.

Eliminating gender disparities in primary and secondary education

Achieving this goal involves understanding what holds girls and boys back so that policies can be designed to overcome these obstacles and improve access to and participation in education.

Urgent action is needed in countries where the gender gap is still large in primary and secondary education. An overriding priority is to tackle poverty constraints by reducing the direct and indirect cost of schooling to families and addressing the incidence of child labour. The school environment requires equal attention. Sexual violence and harassment within schools, particularly where HIV/AIDS is prevalent, needs to be confronted vigorously. Revising biases in teaching materials, training teachers to be gender aware and working with them and parents to break taboos are essential ingredients of an "engendered" strategy.

As elsewhere, girls' enrolment in sub-Saharan Africa increased during the 1990s and with it gender parity – from 0.83 to 0.88 in 2000 in primary education and from 0.65 to 0.82 at secondary level. The gender parity index at primary level increased by at least 30% in Benin, Gambia and Guinea. Despite this general progress, a number of countries risk not achieving parity either by 2005 or 2015 unless appropriate policies are put in place. Prospects for countries achieving it are based on past rates of change in the gender parity index in primary and secondary enrolment.

Sub-Saharan Africa: selected education indicators, 2000.

	Total population (thousands)	Compulsory education (age group)	Legal guarantee for free education	Adult literacy rate (%)		Pre-primary education		Primary education			Secondary education		Tertiary education		Total public expenditure on education as % of GNP	EFA Development Index (EDI)
				Total	GPI	GER (%) Total	GPI	NER (%) Total	GPI in GER	% of female teachers	GER (%) Total	GPI	GER (%) Total	GPI		
Angola ¹	13134	6-14	Yes	...	...	...	...	36.9	0.88	40.8	17.6	0.83	0.7	0.63	3.4	...
Benin	6272	6-11	No	37.4	0.45	6.1	0.95	70.2	0.68	19.9	21.8	0.45	3.6	0.24	3.2	0.62
Botswana	1541	6-15	Yes	77.2	1.07	...	...	84.3	1.00	80.6	79.1	1.06	4.6	0.89	8.1	0.86
Burkina Faso ²	11535	6-16	No	23.9	0.42	1.1	1.07	35.5	0.71	22.9	10.2	0.64	...	...	...	0.47
Burundi	6356	...	No	48.0	0.72	1.2	0.95	53.7	0.80	54.0	10.3	0.77	1.2	0.36	3.5	0.59
Cameroon	14876	6-12	No	71.3	0.81	14.0	1.01	...	0.87	35.5	...	...	4.9	...	3.4	...
Cape Verde	427	6-16	No	73.8	0.78	56.4	1.06	99.8	0.98	64.5	75.9	1.02	...	...	...	0.89
Central African Republic	3717	6-15	No	46.7	0.59	...	...	54.7	0.69	18.3	...	...	1.9	0.19	...	...
Chad ¹	7885	6-14	Yes	42.6	0.66	...	...	58.2	0.63	10.1	11.5	0.28	0.9	0.17	2.0	0.52
Comoros	706	6-14	No	55.9	0.77	1.7	1.08	56.2	0.87	16.5	20.6	0.82	1.1	0.73	...	0.68
Congo ¹	3018	6-16	Yes	80.7	0.85	3.1	1.06	...	0.92	41.1	41.9	0.83	5.0	0.13	5.5	...
Côte d'Ivoire	16013	6-16	No	48.6	0.62	3.1	0.98	62.2	0.76	20.5	23.2	0.55	...	...	4.9	0.63
Democratic Rep. of the Congo ¹	50948	6-15	Yes	61.4	0.69	0.7	0.99	...	...	...	...	...	...	...	...	...
Equatorial Guinea	457	7-11	Yes	83.2	0.80	29.2	...	71.7	0.91	25.7	31.0	0.43	2.7	0.43	1.9	0.61
Eritrea	3659	7-13	No	55.7	0.66	5.6	0.91	41.0	0.82	40.6	28.3	0.71	1.7	0.15	...	0.58
Ethiopia ²	62908	...	No	39.1	0.66	1.8	0.97	46.7	0.69	30.3	18.0	0.66	1.6	0.27	4.8	0.54
Gabon	1230	6-16	No	...	...	14.4	1.01	87.6	0.99	47.8	59.6	0.94	...	...	4.6	...
Gambia ^{1,2}	1303	...	Yes	36.6	0.68	20.1	0.90	68.7	0.91	28.8	37.4	0.70	...	...	2.7	0.63
Ghana ^{1,2}	19306	6-14	Yes	71.6	0.79	59.3	0.99	58.2	0.91	34.8	36.2	0.81	3.3	0.40	4.2	0.70
Guinea ²	8154	7-14	No	...	...	...	...	47.0	0.72	25.0	...	...	...	...	2.0	...
Guinea-Bissau ¹	1199	7-12	Yes	38.4	0.43	3.9	1.05	53.5	0.67	...	20.4	0.54	0.4	0.18	2.3	0.46
Kenya	30669	6-13	No	82.4	0.86	41.6	0.98	68.5	0.99	42.0	30.6	0.91	2.9	0.77	6.4	0.78
Lesotho	2035	...	No	83.4	1.29	18.1	1.03	78.4	1.05	80.2	32.8	1.20	2.6	1.76	7.9	0.80
Liberia	2913	6-16	No	53.5	0.52	69.5	0.89	...	...	...	22.5	0.69	...	...	...	0.59
Madagascar ¹	15970	6-14	Yes	66.5	0.81	3.4	1.02	67.7	0.96	53.5	...	...	2.2	0.84	3.2	0.69
Malawi	11308	...	Yes	60.1	0.62	...	...	...	0.98	37.9	35.7	0.76	...	...	4.1	...
Mali ¹	11351	7-15	Yes	25.6	0.45	1.4	0.99	...	0.72	23.0	...	...	...	...	3.0	...
Mauritius	1161	6-12	Yes	84.5	0.93	90.3	1.03	94.7	1.00	55.1	77.1	0.94	11.4	1.38	3.7	0.94
Mozambique ²	18292	...	No	44.0	0.48	...	...	54.4	0.76	25.9	11.9	0.64	0.6	0.79	2.5	0.51
Namibia ¹	1757	6-16	Yes	82.0	0.98	21.4	1.15	81.6	1.01	66.8	61.7	1.13	5.9	1.24	...	0.88
Niger ^{1,2}	10832	7-12	Yes	16.0	0.36	1.1	0.98	30.4	0.68	33.1	6.4	0.66	1.5	0.34	2.8	0.44
Nigeria	113862	6-12	Yes	64.0	0.78	...	...	...	...	...	...	...	...	...	...	...
Rwanda	7609	7-15	Yes	66.8	0.82	2.7	0.99	...	0.99	51.1	14.1	0.98	1.7	0.50	2.8	0.74
Sao Tome and Principe	138	7-13	Yes	...	...	...	...	...	...	61.8	...	...	...	...	...	...
Senegal ¹	9421	7-12	Yes	37.4	0.59	3.6	...	63.1	0.89	22.1	17.8	0.66	...	...	3.2	0.61
Seychelles	80	6-15	Yes	...	...	...	...	...	...	84.1	...	...	...	...	7.9	...
Sierra Leone	4405	...	No	...	...	4.0	...	...	...	38.4	26.5	0.82	2.2	0.40	...	...
Somalia	8778	6-14	...	...	...	...	...	...	...	...	...	...	...	...	...	...
South Africa	43309	7-15	No	85.2	0.98	33.6	1.00	88.9	0.95	75.2	87.3	1.09	15.2	1.23	5.8	0.83
Swaziland	925	...	No	79.6	0.97	...	...	92.8	0.95	75.4	59.9	1.00	5.2	0.87	...	0.88
Togo	4527	6-15	No	57.1	0.59	2.4	1.00	91.2	0.80	12.5	39.1	0.45	3.7	0.20	4.9	0.71
Uganda ²	23300	...	No	67.0	0.73	4.2	1.00	...	0.90	32.6	15.2	0.64	3.0	0.52	2.3	...
United Republic of Tanzania ²	35119	7-13	Yes	75.0	0.79	...	...	46.7	1.00	45.3	5.8	0.81	...	...	...	0.73
Zambia ²	10421	...	No	78.2	0.84	...	...	65.5	0.95	50.4	23.5	0.81	2.5	0.47	...	0.78
Zimbabwe	12627	6-12	No	88.7	0.91	36.3	1.03	79.6	0.97	48.3	44.5	0.88	3.9	0.60	11.1	0.83
Sub-Saharan Africa	615453	...	...	60.3	0.75	4.2	1.00	58.2	0.88	39.5	26.5	0.82	2.5	0.48	3.4	...
Developing countries	4700496	...	...	73.6	0.82	30.9	0.99	82.1	0.92	61.5	59.9	1.01	10.4	0.73	4.1	...
World	6041386	...	...	79.7	0.87	46.7	1.01	83.8	0.93	72.3	77.5	1.06	22.9	1.04	4.5	...

Source: EFA GMR 2003, Statistical annex.

Data in italics are for 1999.

1. Primary school fees continue to be charged despite legally-guaranteed free education, according to a World Bank survey (2002).

2. Countries invited to participate in the Fast-Track Initiative (FTI).

Note: EDI is a new composite index that incorporates indicators for the four most quantifiable EFA goals – UPE, adult literacy, gender parity and quality of education. It aims to give a broader picture of progress toward EFA and identify countries doing well on all fronts, those succeeding in only some areas and those with all-round difficulties (for further explanation, see Appendix 2 of the full Report). The EDI for a country is the arithmetical mean of the observed values of indicators selected for each of the EFA goals. Since these are percentages, the value can vary from 0 to 1. The higher it is, the closer a country is to the goal and the greater its EFA achievement.

Countries that have already achieved gender parity:

- **Primary education (10 out of 40 with data):** Botswana, Cape Verde, Gabon, Kenya, Malawi, Mauritius, Namibia, Rwanda, the United Republic of Tanzania, Zimbabwe.
- **Secondary education (3 out of 36 with data):** Cape Verde, Rwanda, Swaziland.

Gender parity prospects

(27 countries with data in 1990 and 2000 for both primary and secondary education have not yet achieved it):

- **Countries likely to achieve parity in 2005 (2):** Kenya, Malawi.
- **Countries likely to miss parity in 2005 but achieve it by 2015 (9):** Botswana, Comoros, Congo, Gambia, Ghana, Lesotho, Namibia, Uganda, the United Republic of Tanzania.
- **Countries that may not achieve it in 2015 either at primary, secondary or both levels (16):** Benin, Burkina Faso, Burundi, Chad, Côte d'Ivoire, Ethiopia, Madagascar, Mauritius, Mozambique, Niger, Senegal, Sierra Leone, South Africa, Swaziland, Togo, Zimbabwe.

These are forecasts based on recent trends. While more than 90% of the countries (25 out of 27) are likely to miss reaching gender parity at either primary or secondary level or both by 2005, policies (in the region or elsewhere) are available to many of them to achieve it within a few years.

Resources and aid

Eliminating gender disparities and inequality while achieving all the other EFA goals is costly. Countries will need to allocate more of their own resources and use them more effectively. Half the countries with data were spending less than 3.4% of national income on education in 2000 – lower than the 4.1% average for developing countries.

The least developed among them, with the lowest education indicators, will need more external aid to achieve EFA. Yet overall bilateral and multilateral aid to education fell between 1998/99 and 2000/01, though it increased for basic education. Even if high priority is given to sub-Saharan Africa, which receives 27% of all bilateral aid to education, current problems of turning aid commitments, especially the FTI,³ into reality do not augur well for international assistance to countries at risk or serious risk of not achieving the EFA goals, particularly the gender targets. ■

3. Of the 18 countries initially invited to participate in the Fast-Track Initiative, 10 are from sub-Saharan Africa – Burkina Faso, Ethiopia, Gambia, Ghana, Guinea, Mozambique, Niger, Tanzania, Uganda and Zambia.

ACRONYMS

FTI Fast-Track Initiative. Designed primarily by the World Bank, the FTI was launched in April 2002 as a process that would provide quick and incremental, technical and financial support to countries that have policies but are not on track to attain Universal Primary Education by 2015.

GER Gross enrolment ratio. Number of pupils enrolled in a given level of education, regardless of age, expressed as a percentage of the population in the relevant official age group.

GPI Gender parity index. Ratio of female to male value of a given indicator. A gender parity index equals 1 indicates parity between sexes; a GPI that varies between 0 and 1 means a disparity in favour of boys; a GPI > 1 indicates a disparity in favour of girls.

GNP Gross national product.

NER Net enrolment ratio. Number of pupils in the official age group for a given level of education enrolled in that level expressed as a percentage of the total population in that age-group.

UIS UNESCO Institute for Statistics.

Advocacy Brief

Role of Men and Boys in Promoting Gender Equality

Prepared for UNESCO Bangkok
by Tarno Chattopadhyay

May 2004



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Role of Men and Boys in Promoting Gender Equality

1. Introduction: Scope of this document

There has been an increasing emphasis internationally, in policy and in practice, on engaging men to promote and achieve gender equality. Beginning with the Beijing Declaration, adopted by the Fourth World Conference on Women in 1995, a number of intergovernmental platforms, including the World Summit on Social Development (1995) and its review session (2000), as well as the special session of the General Assembly on HIV/AIDS in 2001 have focused on this issue. The importance of education systems in shaping the gender perspective of boys was underscored in the landmark Dakar Framework for Education for All (UNESCO, 2000). An explicit goal (goal 5) of the Dakar framework is to ensure that education systems contribute to and promote gender equality, instead of reinforcing gender stereotypes. Most recently, in its 48th session in March 2004, the United Nations Commission on the Status of Women specifically focused on the theme: *The role of men and boys in achieving gender equality*.

According to UNESCO, the term gender refers to the socially and culturally constructed meanings and roles assigned to persons of different biological sexes: males and females. The concept also includes the expectations held about the characteristics, aptitudes and behaviors of both women and men. On the other hand, the notion of gender equality entails that all human beings, both men and women, are free to develop their personal abilities and make life choices without the limitations set by stereotypes, rigid roles and prejudices. In other words, gender equality means that the differences in behaviors, aspirations and needs of women and men should be valued and treated equally. It does not mean that women and men have to become the same; but that their rights, responsibilities and opportunities will not depend on whether they are born male or female. Thus, gender equality starts with equal valuing of girls and boys. It is based on women and men being full partners in their home, their community and their society.

- While the concept of Gender Equality is not new,
- what is relatively new is the concerted effort to revisit
- men's roles and identities in order to significantly
- increase men's involvement in gender equal
- societies. The current policy brief aims to present
- key rationales, identify principal challenges, and
- recommend actionable strategies for engaging boys,
- young and adult men¹ in efforts to achieve gender
- equality. The goal of the policy brief is to provide
- policy makers, practitioners, business and the civil
- society leaders with a framework for developing
- strategies, implementing programs, and evaluating
- progress of engaging men in gender equality efforts
- in all spheres of life.

2. The Rationale: Why men have a stake in gender equality

(a) Men have a lot to benefit

Despite dominant rhetoric about manhood, many men suffer from socially constructed gender stereotypes and hence have a lot to gain from a gender equal society. Such stereotypes put pressure on them to be 'tough' and be the 'breadwinner'; resulting in conditions of labor which are often harsh and involves injury, violence (including army and war), crime, and imprisonment. Macho images of masculinity are also leading men to engage in un-safe sex that jeopardizes their partners' and own well being. Men, who are victims of many forms of personal and institutional violence, primarily at the hands of other men, have a great deal to gain from moving towards gender equality: it is an important step towards reducing violence. Particularly, tackling homophobia and other forms of discrimination

¹ From here until the end of the Policy Brief, the term "men" will be used, unless indicated otherwise, to refer to "boys, young and adult men".

against men because of their sexual orientation, will undoubtedly have very positive effects on promoting gender equality between heterosexual men and women, since in both cases a repressive 'status quo' is challenged.

Because of gender stereotypes men are also missing out on a whole range of emotions and experiences that are immensely rewarding and socially valued. For example, in most cultures men are not expected to play a significant role in caring for the children, or for sick parents, or to show affection and express their vulnerabilities in distress; since these qualities are typically assigned to women.

Moving toward gender equality does not mean loss of masculinity. *It does mean that men as a group will be able to share and be part of a broader, healthier, safer, and richer cultural experience.*

(b) The society benefits as a whole

The formations of dominant and violent military masculinities in conflict zones around the world create extreme forms of gender oppression. The active involvement of men and boys in promoting gender equality is a critical resource in peace building, peacekeeping and social reconstruction. On the other hand, men's violence against women produces staggering economic and social costs, detrimentally affecting economic performance and efficiency. Domestic violence in Canada is estimated to cost the country some \$1.6 billion per year; while, for the United States, the losses are as high as \$67 billion. In New Zealand, the cost of family violence in 1993 was at least \$1.2 billion, more than the earnings from the export of wool.

A fundamental benefit for men and women to live in gender equality is to live in a world where arbitrary inequalities of all kinds are rejected. Thus, although there could be short term struggles, in the long term men and women win if the society is gender equal.

(c) Men can make a difference

Achieving gender equality requires systemic changes in policy and modes of social interactions at all levels of the society: home, work place, school, public services, media, and so on. Men continue to occupy positions of power and privilege in the social structures of

patriarchal social system and without their active involvement a gender equitable society will neither be achievable nor be sustainable.

3. Challenges: Why it is difficult to involve men for gender equality

Peer pressure, social norms, and available institutional/organizational rules (such as child care facility based on number of women employees only, and not considering men's role in child rearing) influence adherence to gender specific stereotypes. In many parts of the world men's supremacy is justified on grounds of religion, biology, cultural tradition or organizational mission (for example in the military or police force). Since men continue to benefit from these 'patriarchal dividends', there remains a strong of resistance among certain men to be engaged in fighting for gender equality. The areas where the role of men has received most attention are violence and sexual/reproductive health. But these two areas, just as gender inequality as such, are manifestations of much larger underlying social processes (such as: socialization in family, in school, in workplace) that reinforce gender stereotypes and assigns expected gender roles. These core issues that manifest in a multiplicity of challenges in all aspects of life, can be addressed through an ensemble of strategies that are outlined in the next section.

4. Strategies: How to engage men to promote gender equality

(a) Basic working principles

1. **Human Rights Framework:** Given the deep-rooted socio-cultural factors that perpetuate gender discrimination, there is a tremendous need to reframe the issues and create a new vocabulary to formulate effective strategies for change. Framing gender equality issues in the language of human rights and social justice enables men to see their engagement in gender issues as an action that helps improve human rights of all, as opposed to diminishing their own privileges. The human rights framework also provides with a strong instrument to fight for the equality and social justice of non-heterosexual men and women.

2. **Integrated Social Vision:** There is an urgent need to move from 'adversarial' role to partnership between men and women in achieving the goal of gender equality. Policies should articulate an integrated social vision of gender where men and women play complementary roles. An important experience in this regard comes from a Pakistani NGO named Rozan that is actively involving men, along with women, in developing a national network of gender trainers and activists.
3. **Life-cycle Approach:** Because gender stereotypes are pervasive and they operate throughout lifetime, a life-cycle based approach is needed to affect the socialization of men and boys in relation to the whole range of social arenas: home, education, workplace, economy, sexuality, sexual orientation, health, work/life balance, etc. Lifecycle based strategies should start with early childhood education and care. Within the home environment, interaction with adults who reinforce broader and alternative roles is critical for gender sensitive socialization. Mothers have a crucial role in educating boys on how to treat their future spouses and female partners. Moving through various phases of adolescence and adulthood, the strategy should take into account age specific psycho-social needs: self-esteem, school to work transition, single hood to parenthood, and so on. For example, seeing their male peers advocating for preventing violence against women on popular show MTV, other adolescents were motivated to join since they thought it was 'hip' to act up against gender violence.
4. **Multi-sectoral Partnerships:** Strategies to achieve gender equality should both address ways men need to change, and encourage men to become agents of change. Concrete structured opportunities should be created so that men can become and stay engaged. This requires involving a whole range of stakeholders in the process: governments, multilaterals, private sector, trade unions, civil society, religious organizations, non-governmental organizations, army and the police, research institutes, community agencies, the media; to name a few.
5. **Pragmatic Incrementalism:** Since values and social norms do not change overnight, a pragmatic and incremental approach is imperative. The goal should be to get men into action by identifying their common points of

concern. Often men might be enlisted for some other concern, perhaps for supporting the suffering of other men, but they might eventually see the underlying issue of gender inequality as the root cause and join in that fight. For example, the *Stepping Stone approach* developed by Action Aid helps bringing the underlying issues of gender inequality out in the open.

(b) Education strategy

6. Education, in all its diverse formats and contents: formal, non-formal, supplementary, informal, life-long learning, etc., is widely recognized as a key contributing factor to the social reproduction of gender inequality. By the same token education also is the key towards achieving a gender-equitable society. While their delivery mode, governance structure, or programmatic content may vary, both formal and non-formal educational development should incorporate some basic principles of gender equitable teaching-learning experience. Curricula, through specially designed texts and learning tasks, should allow boys to interrogate masculinity and gender relations.
7. Whether it is a formal school, or a community based non-formal learning center, often a perceived lack of safety for girls, both inside and on the way to such facilities, makes parents withdraw their girl children from education. In Pakistan, a specially designed program had boys as 'big brothers' accompanying girls to school. In Nepal, action research and advocacy supported by Save the Children have engaged girls and increasingly boys in mapping and campaigning for 'safe space' for girls' learning and being in the community environments.
8. Very often in the countries of South Asia formal schools are gender segregated, reflecting long standing social traditions. Deliberate efforts should be made so that young men from 'boys only' schools get opportunities to work with girls, both inside and outside school (such as summer camps).
9. Even when learning environments have students of both sexes; gender differentiated learning assignments, learning tracks and teacher expectations continue to exist. Strategies should include professional trainings

for teachers and program coordinators to interact with learners in gender equitable ways in the learning environment and in broader social settings.

10. There are widespread practices in many societies where boys are typically favored over girls for education. Boys and men should be mobilized by aligning their support for girls' education with other rational priorities. In the Indian state of Haryana the boys and their parents recognized that an educated bride has more earning potential, and this made them strong supporters of girls' education. It significantly slowed the practice of early marriage and withdrawing girls from school.
11. Research shows that boys who are strongly connected to school, excel in some cultural competency such as dance or music, or are star soccer players; seem to have a greater freedom to explore gender equitable behaviors. These realms of competency seem to counter the social pressure to adhere to a traditional version of masculinity. Boys should be presented with such extended opportunities to excel and define themselves through formal and non-formal education and developmental programs.
12. Health education, specifically education about HIV/AIDS and reproductive health for men should be integral part of any formal or non-formal offering.

(c) Institutional strategies

13. The workplace, including the education sector, is a major site of inequality between women and men that thrives on gender stereotypes of work roles. Special legislative changes, including tax incentives, targeted hiring practices should be considered as mechanisms to engage men and women to work in roles traditionally considered to be for the opposite sex. Employer policies such as training gender competencies for staff, paternity leave (leaves for men to stay home with the newborn, as in Scandinavia), flexible work hours, enforced sexual harassment policies, and childcare facilities for male employees should be considered too.
14. Similarly, training programs for men in childcare and other professions considered as feminine would enable them to accept opportunities outside of gender stereotypes.

15. There is a clear power differential across the gender divide. Hence it is critical to work with men in positions of power and have them publicly endorse and enforce gender equality in their own practices to mobilize others. Male dominated institutions such as police force and military can play a positive role in promoting and protecting gender equality through appropriate education and sensitization campaigns.

(d) Communication strategy

16. Most societies of Asia are more accepting (or less vindicating) of men having multiple sexual partners, while women are widely expected to be sexually submissive and monogamous. Male sexual practices, such as unsafe sex with multiple partners, play a crucial role in spreading of HIV/AIDS. The risk is also acute for non-heterosexual males. The myths about AIDS, men's crucial role in spreading the epidemic, its fatal consequences, and the behavioral changes necessary to prevent the disease should be communicated with utmost urgency and cultural sensitivity. Same applies for violence against women. UNICEF's '*Let's Talk Men*' educational videos for adolescent boys in Asia help them explore issues of masculinity and its relationship to violence against women.
17. Like in any social campaign, allies should be identified using the existing forms of social network: churches, mosques, microfinance agencies, school principals, government officers, community elders and so on. A campaign by Buddhist monks in Thailand (Sangha Metta) is having a significant impact on raising awareness on HIV/AIDS among men and women.
18. Strategies should be context specific, and responsive to local cultural measures. For example, in Yemen: instead of using the word '*gender*', the idea of equality of all people was emphasized in efforts to reduce gender discrimination against women. In Canada where public discourse of gender is more accepted, '*The White Ribbon Campaign*' organizes a highly visible advocacy event, where men and boys wearing white ribbons publicly display their commitment to end violence against women.

19. Often a typical argument is: "*men cannot do that, it is a woman's job*". However, under unemployment pressures, men have joined the nursing profession, once considered solely a woman's job. It is important to keep sight of this capacity of men to change and while devising communication strategies for engaging men.

20. A vital step in affecting behavioral change through communication is to ensure that men are listening to the concerns of women. In the case of the NGO '*Promundo*' in Brazil, which engages young men to work with other young men against gender violence, such communication was facilitated with professional counseling. The key is to view young men not as problem but also as solution, and with adequate training, engage them as potential change agents for other men.

5. Conclusion

There is a subtle yet critical distinction between communicating '*role of men in achieving gender equality*', as opposed to advocating '*benefits of greater equality of women in society*'. Any effective strategy to engage men in promoting gender equality must appeal to male policymakers, first and foremost, as a pragmatic and rational framework with clear dividends for men, and not as a moral verdict on the status quo.

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The role of men and boys in achieving gender equality; agreed conclusions <http://www.un.org/womenwatch/daw/csw/csw48/ac-men-auv.pdf>

Beijing Declaration, adopted by the Fourth World Conference on Women in 1995 on men's role in promoting gender equality: paragraph 35

In times of peace, gender equality also makes good sense for all. Recent World Bank figures indicate that an increase of 1 percentage point in the share of women with secondary education can translate

into a 0.3% gain in per capita income. Can the IMF Contribute to the Promotion of the MDGs Relating to Gender Equality?: Peter S. Heller; Deputy Director, Fiscal Affairs Department; International Monetary Fund Meeting of High-Level Women in International Finance, Economics, and Development; Dubai, September 20, 2003. <http://www.imf.org/external/np/speeches/2003/092003a.htm>

White Ribbon Canada: <http://www.whiteribbon.ca>

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Rozan in Pakistan www.rozan.org

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Example of the Indian state of Haryana: see Govinda, Basic Education in India (2002)

UNICEF's '*Let's Talk Men*' educational videos: www.unicef.org

In Nepal, action research and advocacy projects supported by Save the Children have engaged girls and increasingly boys in mapping and campaigning for '*safe space*' for girls' learning and being in the community environments. www.id21.org

Additional Resources

Documents from "*The role of men and boys in achieving gender equality*" Expert Group Meeting; Organized by DAW in collaboration with UNDP, ILO and UNAIDS; 21-24 October 2003; Brasilia, Brazil <http://www.un.org/womenwatch/daw/egm/men-boys2003/>

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Directory of Gender Related Internet Resources for Academic Research - Links to academic resources on Gender. Includes Electronic Discussion Lists; Conferences; Organisations; Bibliographies; Electronic Texts; Departments, Research Centres, Programmes and Syllabi; Libraries Worldwide.

Electronic Development and Environment Information System (Gender) - Hosted at the Institute of Development Studies. Eldis is one of the best on-line directories to information resources on development and environment. The Gender Guide allows searching this database for organisations, online documents and print publications on Gender.

IRC Gender Publications (Water and Sanitation) - From the International Water and Sanitation Centre (IRC), a number of English-language publications on gender issues for water and sanitation projects. Includes theoretical framework as well as practical tools.

IWTC GlobalNet - How to subscribe to this weekly one-page bulletin of current information on women-and-development events, organisations and resources worldwide. From the International Women's Tribune Centre.

MANUSHI: A Journal About Women and Society - This site carries select articles from the issues of Manushi, a magazine which analyses political, economic and social issues within India. Articles focus on women's lives and work, civil liberties and human rights.

Mapping the World of Women's Information Services - Mapping the World is a database of women's information services available throughout the world. Its aim is to increase the visibility of women's information services, and to facilitate access to gender-specific information. Target users are women and women's organizations, policy makers, decision makers and general information services.

Men's Bibliography - A comprehensive bibliography of writing on men, masculinities and sexualities. Compiled by Michael Flood (7th edition; February 1999)

OECD-DAC Gender Publications - Visit the site of the OECD-DAC Working Party on Gender for a number of useful publications: gender glossary, DAC Guidelines, conceptual issues relating to gender, and more.

• **UNIFEM Publications** - UNIFEM has an active publications program, addressing core focus areas such as Human Rights, Ending Violence Against Women, CEDAW, Economic and Political Empowerment. Visit this site to learn more.

• **University of Minnesota Human Rights Library: Women's Human Rights** - A listing of links and resources pertaining to Women's Human Rights

• **Women in Development Network (Widnet)** - Includes a directory of women-resource organizations, links and references to other WWW sources, statistics.

• **Women's Studies/Women's Issues Resource Sites** - This is an extremely useful directory of web sites containing resources and information about women's studies/ women's issues, with an emphasis on sites of particular use to an academic women's studies program.

• **Women, Ink. Publications** - Women, Ink. is a project of the International Women's Tribune Centre to market and distribute books on women and development worldwide. It includes 250+ titles from publishers all over the world, and is the exclusive distributor of publications from UNIFEM.

• **NATIONAL ACTION PLANS**. The Beijing Platform for Action, in paragraph 297, called on all governments to develop implementation strategies or plans of action for the Platform. List of countries that have submitted national action plans/strategies to the Division for the Advancement of Women can be found on-line (<http://www.un.org/womenwatch/followup/national/natplans.htm>) together with a useful list of summaries of national plans arranged by region/country (<http://www.un.org/womenwatch/followup/national/africsum.htm>).

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PARTICIPATORY MONITORING AND EVALUATION TOOL PACKAGE

PARTICIPATORY GENDER ANALYSIS TOOLS FOR ASSESSMENT, MONITORING AND EVALUATION IN THE EDUCATION SECTOR

Gender analysis is not a specific technology. Rather, it is an approach for examining factors related to gender throughout the process of program development, from conceptualization, needs assessment, and design to implementation and evaluation. It is a way of looking at the world that brings into focus the activities and roles, access to and control over resources and decision-making power of women, men, girls and boys within the system under analysis. The purpose of gender analysis is to ensure that development projects and programs fully incorporate the participation and take into account the needs of men, women, girls and boys.

This sheet introduces a selection of tools for conducting a gender analysis in the education sector. It offers practical tools to enable observers to see the gender interactions that occur in the classroom, school and community environments. The Participatory Learning and Action (PLA) activities introduced allow researchers and stakeholders to identify patterns of instructional interactions, management procedures, student-to-student interactions and parental perceptions and attitudes that influence the school participation and achievement of boys and girls in differential ways.

TOOLS MODELED IN THIS WORKSHOP

Classroom Observations

Traditionally, classroom observations have been used for inspection to judge teachers. Another way of using classroom observations is to look for patterns of gender-related interactions and encourage reflection on teaching practice to foster improved teaching and learning. Structured classroom observations can help teachers identify effective teaching strategies to reduce gender bias, promote the equitable participation of girls and boys and address the diverse needs of all the learners. Classroom observation helps to identify specific factors in the classroom (teaching methodologies, relations between teachers and students, the use of space and the arrangement of the room, etc.) that may contribute to a low level of participation and achievement of all learners.

VIPP Cards

VIPP means “Visualization in Participatory Programs.” It is a people-centered approach to problem identification, decision-making and planning. The VIPP method involves the use of a large number of multi-colored cards of different shapes and sizes on which participants can express their main ideas for the whole group to see. Cards are collected and clustered (in a simple matrix, web diagram etc.) to reveal the different perspectives of group members. VIPP methodology can be used in focus group activities with parents, teachers, students and other community members to explore values and gather information about teaching and learning and other factors that influence the educational participation of boys and girls.

OTHER TOOLS

Activity Log

Some children may want to study but school timetables and calendars conflict with their duties. The 24-hour and Seasonal Calendars collect information about the kinds of activities that boys and girls engage in over a specific period of time. An activity log allows observers to count the frequency in which boys and girls are involved in different activities and determine how these activities affect school participation. Seasonal calendars help identify months of greatest difficulty and vulnerability in terms of, for example, student health, and seasonal planting and harvesting that affect access to and participation in school. Activity logs are useful for identifying the different kinds of work done by boys and girls and the gender-differentiated constraints to their participation in education.

Child Profile

The Child Profile is a tool to promote inclusive education. It helps identify potential problems students face inside and outside the classroom that impact the learning process, as well as identify children who are not coming to school and those that are at risk of dropping out. Results highlight the diversity of children in the community and help educators plan programs to overcome the factors that exclude girls and boys from participating in school. Results also provide information that enables teachers to adapt and improve their teaching practices to meet the specific needs of boys and girls.

Mapping Instruments

Maps are useful to both frame observations and serve as a recording instrument. They can be used to collect data about the physical environment of the school and the community in which a school is situated. Community mapping exercises can provide information that helps identify boys and girls who are not in school and the reasons why, as well as identify safety and security challenges confronted by boys and girls on their way to and from school. School mapping exercises can help identify factors that influence student learning and participation in school. Maps reveal information about the location of latrines, the security of the school compound, the location of sources of water, the condition and location of play areas, the condition and organization of classrooms and how these affect girls or boys differently.

Textbook and Curriculum Analysis

Textbook and curriculum analysis permits quantitative and qualitative data collection that reveals gender biases in instructional materials and the curriculum that limit students' personal development. It entails the revision and analysis of curricular materials – textbooks, instructional guides, etc. – in order to detect bias and stereotyping in words and images that may hinder gender equality. Curriculum developers, publishers, principals, individual teachers, and groups of teachers interested in improving equity and quality in education may use the tool to review the materials they commonly use.

SAMPLE TOOLS

The sample tools contained in this package do not represent an exhaustive toolkit. Rather, they serve as illustrative examples of approaches to be adapted, further developed and applied to a variety of settings for collecting gender-sensitive quantitative and qualitative data about students, schools and communities. By presenting these tools, we hope that users of this resource will gain experience in applying and adapting these and other participatory methodologies to serve their own needs.

The tools presented in this resource have been adapted from the following sources:

- *Child Health in the Community Training Guide*, WHO
- *Classroom Observation Tools*, Ray Chesterfield, IEQ for USAID
- *Classroom, School and Home Factors that Negatively Affect Girls Education in Malawi*, UNICEF
- *Girls' Participatory Learning Activities in the Classroom Environment (GirlsPLACE)*, Diane Van Belle-Prouty and Haddy Sey for USAID Africa Bureau
- *Integrated Participatory Approaches for Quality Learning (IPAQUAL) – Workshop Guide*, GroundWork Inc.
- *A Manual For Gender-Focused Field Diagnostic Studies*, IFAD
- *Toolkit for Assessing and Promoting Equity in the Classroom*, Creative Associates International

CLASSROOM OBSERVATIONS

CLASSROOM OBSERVATIONS

CLASSROOM OBSERVATION: CLASSROOM MAPPING INSTRUMENT

The objective of both methods of classroom observation using mapping and recording teacher/student interactions is to observe the teacher/student interactions and whether equitable levels of attention, participation, and encouragement are being given to girls and boys. The recommended amount of time for the classroom observations is a minimum of 30 minutes.

School Name: _____ Department: _____
District: _____ Teacher's Name: _____ Male: ___ Female: ___
Class level: _____ Duration of observation _____

Task I: Draw a map to show location of students and movement of teacher and exchanges.

(Use the white space at the bottom to draw the classroom map and record the interactions.) You can observe a complete lesson and continue to record interactions or this can be done within a limited time period for example spending only 30 minutes to observe and record.

Mapping legend: Describe the codes that will be used for the classroom mapping.

Example of coding: The following codes may be useful and others can be added depending on what the observer wants to monitor (i.e. not only boys versus girls, but also could indicate race, language, minority student, learner with disability, etc.)

G/B	Girl/boy
???	Teacher asks question
G	Girl/Boy asks question (put a box around the letter "G")
-----	Teacher movement in the classroom
-> ->	Student movement in the classroom (i.e. pupil demonstrates in front of the classroom)
>>	Interaction between students (group work)
+/-	Teacher encourages/scolds student
*	Whole class response (choral response)

Task II. Summarize the interactions observed.

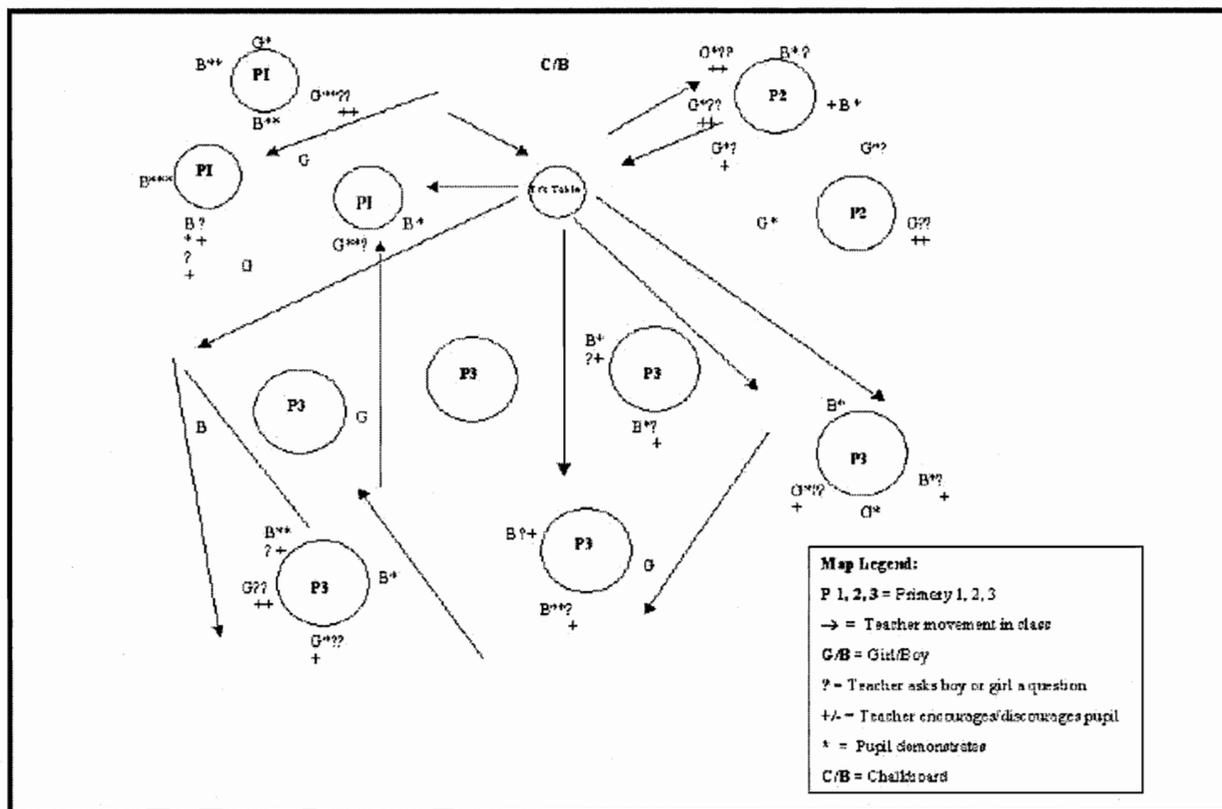
(e.g. out of the total number of girls in the classroom, how many times the teacher called on the girls and whether or not the feedback was positive, negative; out of the total number of boys in the classroom, how many times the teacher called on the boys and whether or not the feedback was positive, negative, etc.)

EXAMPLE OF THE CLASSROOM MAPPING INSTRUMENT APPLIED IN UGANDA

In countries where EIC has been implemented, teacher supervisors and educators in some cases are already familiar with the strategy of classroom mapping. In Peru, the EIC workshop facilitators said that this type of mapping strategy has been used with upper grade primary students who recorded observations of their own teachers' interactions. In South Africa, teachers who were introduced to the instruments for the first time eagerly utilized them to conduct peer observations and provide feedback to each other. These observations can raise awareness about student participation levels and discriminatory teaching practices.

In Uganda, teacher supervisors/mentors called Coordinating Center Tutors (CCTs), were trained in the use of the EIC classroom mapping instrument. They have incorporated this strategy into their daily practices in which they provide continuous monitoring, feedback, and support to teachers in a cluster of schools. During the results monitoring of the EIC Project in Uganda, best practices were collected from CCTs and teachers, who as a result of EIC training, are implementing strategies to promote equitable teaching and learning. Below is an example of a classroom mapping that was completed by a CCT during an observation in a multi-grade classroom in the Kalangala District. From this sketch of a classroom lesson, the observer can assess that there is active participation in this classroom because the teacher is asking questions and providing encouragement to the majority of the learners. Since the number of girls and boys is fairly even (17 girls/16 boys), it appears that the teacher is encouraging greater girls' participation because 17 questions were asked to girls compared to 9 questions directed at boys. The teacher is giving encouragement to all the pupils that he/she interacts with rather than discouragement.

Classroom Mapping Sample: Teacher/Student Interaction in a Multi-Grade Classroom



DESIGN AND APPLICATION OF THE CLASSROOM OBSERVATION INSTRUMENT

PART B TEACHER/LEARNER CLASSROOM INTERACTIONS

The teacher/learner classroom interactions tool helps to answer the question if teachers interact differently with boys and girls by quantifying interactions and measuring the type of responses. The instrument will help to determine whether all students receive the same kind of questioning, wait time and feedback from their teachers. As a teacher, one way to promote classroom equity is to master the skill of equitable facilitation. Different types of questioning and feedback either encourage or discourage participation and learning. It is important to note that facilitation techniques that encourage higher order thinking and student initiated questioning may be encouraged at a policy level, while not supported by local beliefs about what good teaching and classrooms look like. Fundamental beliefs must be examined in order to change teacher practice to improve equity. The teacher/learner classroom interactions tool provides a focus for discussion about these issues.

The tool can be used before or after the classroom mapping is completed; it is recommended not to use these two instruments simultaneously. Use the instrument to track a dozen or more interactions in the classroom. The exchanges may not necessarily be sequential because the observer may not have time to complete recording all of the information in the matrix for the first interaction before the teacher or pupil has initiated the next exchange. Analysis is required on the part of the observer to assess what level of question is being asked and what dynamics are occurring and therefore this may require a little more time.

Using the tool, the observer will answer the following questions and record the following information.

1. Who initiates the exchange and what level of questioning is being asked?

- Record who initiates the exchange whether it is the teacher, a girl or boy;
- Record whether the question asked of the learner is at the level of knowledge, analysis or evaluation. Analysis is required on the part of the observer therefore see the explanation below on how to categorize levels of questions.

Level of questioning of learners influences higher order thinking and participation

Teachers ask three types of questions to students – knowledge level, analysis level, and evaluation level. Students who are asked higher-level questions receive a better education.

The following three types of questions (Bloom's Taxonomy) should be used in every discussion with an emphasis on analysis and evaluation. These types of questions are indicated on the teacher/student interactions tool under the column "level of question."

1) Knowledge Level Questions

- Require students to recall facts
- Provide a common ground to prepare for higher-level questions
- Brainstorming is an example of a technique that might require recall
- Key words – "who, what, when, where, how?" "Describe..." "In your own words, tell..."

Example: "Name the parts of a plant."

(*Should be classified as a low level question on the observation instrument)

2) Analysis Level Questions

- Relate ideas, compare pros and cons, explore assumptions, and promote logical thinking
- Key words – “Compare...” “Place in categories” “Outline” “Combine two ideas for a new whole.”

Example: “Compare this plant with that plant”

(*Indicated/classified as a high level question on the observation instrument)

3) Evaluation Level Questions

- Require students to move beyond the facts and analysis to develop their own judgments
- Require students to think and defend ideas based on facts, not emotions
- Key words – “What solutions would you suggest?” “Do you agree?” “What do you think about...?” “What do you think is the most important?”

Example: “Which of the three plants is better adapted for a hot, dry climate?”

(*Indicated/classified as a high level question on the observation instrument)

2. Who responds to the question being asked?

- Record whether a boy or girl responds; a small group of students, the whole class (choral response); the teacher (to a question initiated by a learner); or mark no response.

3. What type of feedback is given by the teacher?

- Record whether the feedback is positive (emphasizes form or substance or is enabling), negative (judgmental), or neutral. Analysis is required by the observer to be able to determine the type of feedback therefore see the insert below that describes how to classify feedback.

Feedback To Promote Learning, Self-esteem and Participation

The feedback educators give to learners' work and responses in class affects their learning, positive self-esteem and participation in class. Some kinds of teacher feedback help students to learn and think. Other kinds of feedback cause children to be fearful and disengaged. Learners who receive feedback that enables them to learn from their mistakes and feedback related to the substance of their work are receiving a better education. Educators who give no response or negative feedback that is personal or judgmental are in effect giving children a lesser education.

Classroom ethnography research in the United States and Africa (Sadker, 1997; D. Prouty and H. Sey, 1998) documents a disparity in the kind of feedback teachers give boys compared to girls. Teachers can devise a system using seeds or small pebbles to verify the kinds of feedback they are giving to boys and girls. They can also ask a peer to watch them teach and tally the different types of feedback they give to girls and boys.

Categories of feedback are classified as follows on the teacher/pupil exchanges tool:

- 1) No feedback (neutral)
- 2) Judgmental (negative feedback)- “You haven't done your homework again, you'd be better off in the market.”
- 3) Emphasizes form (positive feedback)- “Your handwriting is nice.” “Good work!”
- 4) Emphasizes substance (positive feedback)- “You listed several animals that no one else thought of.” “You solved that math problem in an unusual way.”
- 5) Enabling (positive feedback)- “I see one animal in your list that doesn't fit, see if you can find it.” “Look carefully at your first paragraph and find the sentence that is not a complete sentence.”

4. What are the classroom dynamics like and do they create an enabling environment for learning?

- *Define and record the classroom dynamic that is reflected in the quality of the exchanges between the teacher and learner (i.e. if the teacher relates to the learner's experiences and knowledge, if the teacher requires the learner to reflect and go further in depth to provide an answer). Analysis is required by the observer to assess whether the teacher is effective in creating an enabling environment for learning. A teacher must be a good facilitator in order to teach effectively. The observer should consider the following effective facilitation techniques.*

Teacher Facilitation Technique:

A gender-sensitive teacher calls on girls and boys equally, asks the same levels of questions to boys and girls, and gives enabling feedback to both boys and girl. An excellent facilitator uses the following techniques that should be monitored for when conducting classroom observations:

1) Questioning

- Provokes thinking and engagement.
- Uses open-ended questions.
- Uses higher level questions that require thinking or reasoning.
- Uses follow-up questions, "Tell me more."
- Monitors the number and types of questions she/he is asking girls and boys, minorities, and those students perceived as more capable.
- Encourages students to ask their own questions.
- Finds out how many students agree or disagree with a point and asks them to defend their opinion.
- When a student doesn't answer, asks a simpler question, yes/no type, select from a choice, repeats the question, waits longer, or provides a cue to keep all students participating.

2) Wait Time

- Waits 3-5 seconds before calling on a student. 10-20 seconds are needed to answer higher-order questions.
- Knows that wait time results in more thoughtful responses.
- Knows that wait time encourages participation by more children.
- Knows that wait time surprises children and engages the entire class more than when teachers habitually acknowledge those who raise their hands quickly.

3) Encouragement

- Uses positive body language with all students.
- Creates safe environment for sharing ideas.
- Offers non-judgmental remarks.
- Uses the same responses for boys and girls.

4) Paraphrasing and Summarizing

- Reflects back and restates what the student says.
- Shows students that the teacher is really listening.
- Brings out clarity.
- Is useful in resolving conflicts or issues.
- Pulls information and facts together.

- Models how to organize information.
- Is a critical component of a good lesson.

Observations made that could not be recorded on the instrument can be commented on using the reverse side of the paper or in a separate notebook. After completing the observations, it is important to analyze and summarize the findings. It is helpful when first learning how to use the instrument to conduct observations in pairs in order to compare and discuss findings with another person. After analyzing the findings, if the observer is a teacher mentor/trainer, he/she should find an appropriate time to sit with the teacher and share their observations remembering that the feedback should promote collaborative problem solving rather than fault finding.

Teacher/Learner Classroom Interaction Tool

Name of the school: _____ District: _____ Region/department: _____
 Name of the teacher: _____ Female: _____ Male: _____ Grade level: _____ Length of observation: _____

Exchanges	Initiator Asks Questions					Respondent					Reply			Teacher Feedback					Dynamics of effective classrooms							
	Teacher	Pupil		Level of Question		Teacher	Girl	Boy	Small Group	Whole Class	Verbal	Non-verbal	No response	Types: Neutral, Negative and Positive					Draws on Experiences and Knowledge	Allows time for Reflection	Probes for Deeper Understanding	Other				
		Girl	Boy	High	Low									No feedback (Neutral)	Judgmental (negative)	Emphasizes form (positive)	Emphasizes substance (positive)	Enabling (positive)								
1.																										
2.																										
3.																										
4.																										
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12.																										
13.																										
14.																										

Record Notes on Classroom Dynamics: Use the other side to write about the observations recorded and also to add ideas that could not be recorded in this matrix.

EXAMPLE OF THE TEACHER/LEARNER CLASSROOM INTERACTION INSTRUMENT APPLIED IN EL SALVADOR

This example was drawn from the baseline data study published by Alberto Barillas at FEPADE in El Salvador. (See Bibliography) The goal of this study is to develop an approximate diagnosis of gender equity in classroom practice in public schools. The ten schools that participated were selected among 34 schools proposed by the teacher trainers/pedagogy advisors that participated in the EIC workshops. Certain criteria were taken into account in the selection of these 10 schools: the location by region (urban or rural); identification of practices related to gender equity (positive or negative); and recommendations from the Department of Professional Development of the Ministry of Education.

The work was performed through interviews of the school directors from the selected schools followed by classroom observations. The procedure consisted in the following:

- Across the ten schools, grades one, three, six, and nine were selected for observation.
- In each school, a random selection was made of one section (in cases where there was more than one section in a grade level.)

From that section, one class session was observed. Then, one teacher was interviewed, and finally, two girls and two boys were chosen to be interviewed through a random selection.

The study mainly focuses on classroom instructional practices. This emphasis is based on the knowledge that the classroom is an environment in which communication and/or cultural interaction is developed and where discriminatory or negative social relations can be perpetuated or new ones developed.

Teacher practices were carefully analyzed through classroom observations and interviews with teachers in charge of the classes. The results of both efforts are shown below. In order to determine the participation level and evaluate the interaction between teachers and students, the researchers used many instruments, including the Classroom Observation Instrument. The findings below are an excerpt from the study and the conclusions and recommendations are not complete. (See the study for more detail.)

Findings

Asking questions in class

In general, the teachers ask most of the questions, which require a very low cognitive level of thinking from the students (yes/no answers, regurgitation of information, choral responses). Some questions are even answered by the teachers themselves.

During class, the number of questions asked by boys in comparison to girls is 3 to 1, a favorable relation for boys. Girls ask better questions of teachers, although these questions tend not to challenge the teachers. Usually, they are inquiries about procedures or directions related to homework assignments or practice exercises they need to do.

Asking questions in class is one of the most important topics related to the analysis of instructional practice. Therefore, teachers were observed and their opinion solicited regarding who asks the most challenging questions in class, teachers or students, girls or boys.

From the classroom observations conducted, (at least 40) it was revealed that between 1 and 71 questions were asked mainly by the teacher. Only about three of the questions required an average cognitive level from students. Boys asked between 1 and 19 questions (only one question required an average cognitive level on the part of the teacher). Girls asked between 1 and 6 questions that were all low cognitive level.

Categories of questions asked in the classroom include:

- (High cognitive level) Questions that stimulate some kind of reflection on what is learned: “What is a reading text? What is your opinion about what I read to you?” “What are your thoughts about it?” Given the context, these questions require thinking and the answers may be varied and do not need “to be exact”. With these types of questions, there is the possibility for students to build a hypothesis, and establish associations between previous and new knowledge. Also, there is the possibility to imagine, and even make mistakes occasionally.
- (Average cognitive level) Questions that have an assessment or evaluation purpose: “Who remembers what we learned yesterday?” “Could you tell me what you recall from the presentation I have just made?” These are questions that aim at determining if the students can regurgitate and recall what the teacher has previously explained.
- (Low cognitive level) Questions that serve as “vehicles” in class: “Did you understand?” “Can we go on?” Such questions have the purpose of simply obtaining “permission” from the students to continue teaching.

There were very few instances in which the first category of questions was asked and when posed, they generated limited responses on behalf of the students (both oral and content wise). It would seem that students are conditioned to a certain type of questioning followed by a limited response, that is short in its oral presentation and requiring a minimum intellectual effort. The proof is that each time a question requires higher order thinking and a richer oral construction, students simply give any answer (fast, simple, short).

Teacher: “What is a reading text?”

Student: “It means to read something.”

Answer given by a boy in sixth grade.

The majority of questions asked by teachers require a minimum level of thinking skills (questions that ask for choral responses, are inserted abruptly, lead to just one type of answer which is already insinuated within the question, etc.). As a result, students are not given the opportunity to learn how to think or generate personal opinions or queries.

According to fourteen teachers interviewed, they noted that the majority of questions are asked by girls during class. Thirteen teachers stated that boys asked more questions and eleven stated that they saw no difference as to which gender asks more questions. According to the observations in class conducted by the researchers, an average of 3 to 1 more boys than girls asked questions.

When queried who asks better questions in class, girls or boys, the answer varied as follows:

- 13 of the teachers said “girls”
- 9 of the teachers said “boys”
- 16 of the teachers saw no difference (both girls and boys equally).

In fact, girls ask fewer questions in class. According to observations, girls formulated the most relevant questions regarding class content, thus requiring a higher cognitive level. However, many of the questions girls ask are regarding directions about performing a task or exercise either in class or outside class.

Invitations or name-calling to participate in class according to gender

It was important to inquire about a variable that may reveal conscious or unconscious preferences on behalf of teachers. This variable deals with teacher invitations to students to participate by calling a

particular name or making a specific reference. For example: "Let's see, Gustavo....." "Luis, please, what would you say about?"

During class time, the teacher asked questions and mentioned a particular name. Out of a total of 15 classes, in 13 of them only names of boys were mentioned. In the 15 classes, the invitations made to boys occurred 3 to 17 times. In the girls' case, they occurred from 1 to 12 times. The 15 cases are shown in the table below:

Invitations or name-calling to participate in class according to gender

Classes	Number of occasions boys are mentioned	Number of occasions girls are mentioned
1	17	1
2	6	2
3	6	2
4	6	12
5	4	0
6	6	3
7	3	1
8	4	1
9	4	1
10	6	2
11	6	2
12	3	1
13	0	6
14	7	2
15	11	6
Total	88	41

As it can be noted in the table above, there is a relation of approximately two to one (almost double), meaning that more boys than girls are called to participate in class. It is possible that teachers call more often on boys for disciplinary reasons. By mentioning their names, teachers make sure that they remain attentive, thus avoiding disruptive or unruly behavior. Along these same lines, since girls are traditionally "quieter" and "more responsible", they do not need to be called on as often.

This data could serve as evidence that boys require more attention and time in class on the part of the teacher. However, the teachers' decisions to engage boys more often than girls seems to occur at a subconscious level.

What is happening in the classroom? Has equity been achieved?

The data collected through the modest baseline study helps to identify certain tensions that constitute the backbone of gender equity practices in schools and classrooms.

Teaching practices seem to be the main obstacle to equity in the classroom. This approach analyses the traditional forms of teaching and the various limitations identified in the interactions between teacher and students.

Classrooms show a division of tasks in which teachers perform all the main activities: those that are intellectually engaging, that require higher cognitive levels, and more effort. That is, the students are not required to perform activities that require higher order thinking skills. Supposedly, students are the center of instructional activities and are the subjects of learning, but the teaching practices place students at a real disadvantage and do not allow access to the learning process mentioned above.

In such classrooms, students do not ask questions. It would seem that they have no cognitive interests and their oral participation is limited individually; students are content with giving choral answers of low intellectual level. Following this mode of instruction, learning outcomes are limited, mechanic, and

repetitive. As a result, there is hardly any chance to reach a level of reflection, critical thinking, and creative processes.

In these type of classrooms, children participate but on very unequal grounds. One of the most important differences is reflected by the fact that girls ask questions about procedures and very seldom about content related activities. On the other hand, teachers invite and call directly on boys to participate more often than girls. Finally, boys get more attention because they tend to cause more discipline problems.

Conclusions

The structure of the teaching and learning process seems to be the main obstacle to establishing equity in the classroom. In this case, both boys and girls were excluded from the opportunity to get a superior education because they could not participate in experiences that develop higher cognition and intellect. This occurs in a subtle way, and usually is not perceived by teachers, students, parents, or school directors.

Recommendations

It is important to encourage research on this subject in order to disseminate results widely, particularly among the school community. This information should be shared not only with Ministry of Education technical staff and university academics, but also with the school faculty and students' families. The dissemination of findings should not be limited for technical purposes, but should aim at developing and promoting critical reflection on gender practices in the classrooms and in schools. Those responsible for the development and dissemination of such information should aim to introduce this issue in community meetings. It will be difficult to achieve concrete results to improve equity in the classrooms in the short-term without the involvement of all possible sectors that may contribute to the discussions and actions including families and community members.

VIPP CARDS

VIPP Card Brainstorm

VIPP is a participatory process that uses cards of different sizes, colours and shapes to show linkages between ideas and areas of consensus and disagreement. For VIPP to be successful, follow the rules for writing cards.

VIPP cards can be used in plenary or small groups for participants to put down their responses to a question. The questions must be clear and unambiguous. By using cards, the responses can be organized logically and to show areas of consensus and disagreement. This method allows all participants the opportunity to express themselves, so that the quieter members in the group are able to contribute. The facilitator needs to analyze the cards and assess what they represent. Guide the discussion on any areas of disagreement to determine the underlying causes.

Rules for writing VIPP cards

- Write only one idea per card
- Write a maximum of three lines on each card
- Use key words
- Write large letters in both upper and lower case
- Write legibly
- Use different sizes, shapes and coloured cards to structure the results of discussions creatively
- Follow the colour code established by the facilitator for different categories of ideas

Rules for involving participants

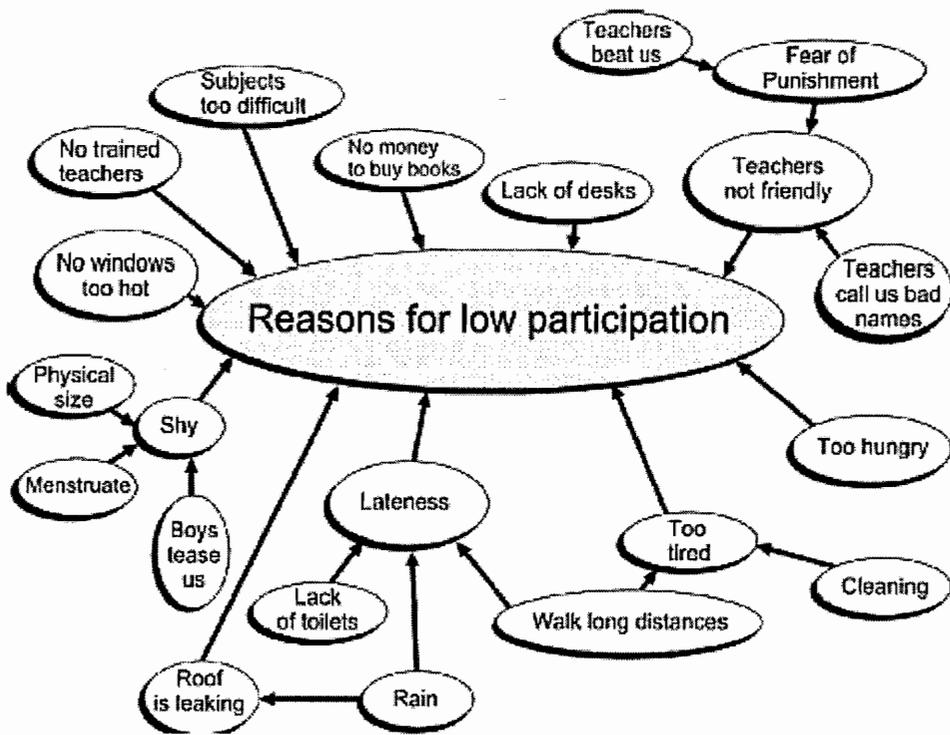
- Each participant is a resource person and every resource person is a participant
- Everyone helps everyone
- Every idea counts
- Conflicts should be dealt with at an appropriate time. Uncomfortable feelings must be dealt with promptly
- Use VIPP as a learning process for making people more tolerant and receptive to other opinions

The following sequence is recommended when using the VIPP method:

- Explain to the participants that you would like to use the VIPP method to generate a list of specific experiences, opinions or beliefs. Add that the experiences should be specific in order to be useful.
- Distribute the VIPP cards to participants.
- Discuss the rules for writing VIPP cards. Answer any questions participants may have about the VIPP method.
- Ask participants to work in groups and draw or write down the answers to the question posed.
- Ask each participant to share what he or she has written or drawn on the VIPP cards.
- Place the VIPP cards on a board (or a wall) where everybody can see them.
- As you direct the session, have another trainer help you group the cards to see the various categories that emerge. Use a matrix or a web as appropriate to categorize cards.
- Summarize the session.

Sample Results:

Question: What factors contribute to poor participation of girls and boys in school?



ACTIVITY LOG

ACTIVITY LOG

Seasonal Calendar Guide

The seasonal calendar shows the main activities problems and opportunities that occur throughout the annual cycle. It helps identify the months of greatest difficulty and vulnerability or other significant variances which have an impact on people's lives.

In this activity seasonal calendars will be used to summarize the following:

- Food availability in terms of the quantity and amounts consumed in order to identify periods of food scarcity, consumption of protein food and coping strategies. The impact of food availability on schooling will be explored, in particular the participation and attendance of boys and girls in school.
- Gender differentiated workloads and time spent completing tasks based on seasonal changes. The workloads will assist us to analyze the labour demands for women, men and children. For example, the differences in workloads of school boys and girls in school and their impact on attendance and performance will be determined.
- Income and expenditure patterns, how they vary throughout the year and the impact they have on schooling.
- Traditional and social activities/ceremonies in terms of occurrence throughout the year and the impact on schooling.

Procedure

- Divide the participants into groups e.g. men, women, school girls, school boys, out of school girls, out of school boys.
- The calendar should first of all be drawn on the ground using sticks, stones, leaves, seeds or any other locally available materials that can be used as symbols.
- Draw a 12 month, 18 month or seasonal (climatic) as appropriate. It need not start in January and should reflect the indigenous seasonal categories. Note: don't impose your calendar. In some cases non-monthly intervals are relevant for the indigenous calendars e.g. wet season and dry season, or planting, weeding and harvesting seasons.
- In each group one participant should be chosen to draw the chart and participants can take turns drawing to maintain the interest level and to ensure participation of all present.
- Ask probing questions to find out the different kinds of work that girls and boys do. Such as:
 - What kinds of work do you do during the rainy/dry seasons.
 - Identify periods when girls engage in different work from boys eg leisure, farm work selling produce, household chores etc
 - Identify impact of climate on education of girls/boys eg absenteeism eg road conditions, cold weather etc.
 - Identify traditional practices and their impact on education
 - Identify disease prevalence and its impact
- Obtain quantitative information qualitatively. For example, for labour demand: first determine the four busiest months by asking your informants a series of questions such as:
 - What is the busiest month?
 - What are you doing then?
 - What is the next busiest month?
 - What are you doing then?

An alternative method is to have participants use seeds, small fruits, stones or other small and seasonal uniform counters to quantify. Sticks can be broken in different lengths and used to indicate relative

magnitudes. In this way an entire seasonal calendar can be constructed with sticks, stones and seeds on the ground.

- Transfer chart to flip chart/paper. Combine all seasonal patterns into one diagram to show correlations between different variables and identify any problem or opportunity times within the year. Cross-check the and refine the chart seasonal calendar throughout the fieldwork. Watch out for seasonal and non-seasonal variations.

Sample Seasonal Calendars

Rainy Season Work Loads and Associated Activities

Target Group	Nov	Dec	Jan	Feb	March	April
Boys	• Digging	• transplanting	• Weeding • Applying fertilizer	• Weeding • Applying fertilizer	weeding	Harvesting
Girls						

Dry Season work Loads and Associated Activities

	May	June	July	Aug	Sep	October
Boys	Making ridges	Planting				
Girls	Initiation ceremonies Making ridges					

Problems of School Girls

Jan Feb March April May	May June July Aug Sept	Sept Oct Nov Dec
Lack of money	Food availability	Work loads
School fees	Diseases	High disease prevalence
Poor Infrastructure	Weather conditions	Food shortage
Dirty unpaved slippery roads	Work loads	
Girls are teased when they fall on ground	Time availability for ground play, rest etc is limited	
Weather conditions result into absenteeism		

CHILD PROFILE

Child Profile

EXAMPLE OF THE CHILD PROFILE INSTRUMENT APPLIED IN EL SALVADOR

This questionnaire is a sample written by an *Equity in the Classroom* facilitator, Mercedes Rodriguez Burgos, in El Salvador. It has been used on school visits. The teacher trainers who participated in EIC training are using the child profile instrument as a strategy to promote learner-centered education and students in the teacher education programs are using the child profiles in the classrooms where they are doing their practice teaching.

The questions included below provide examples of the kind of information that can be obtained about the student to identify what motivates the student in school and other factors either inside or outside the school that can impede the child's learning and achievement. Many more questions could be added to it, for example to investigate the child's health but these are only a few examples. The questions should be adapted according to the maturity level of the learner. Sensitive issues that an interviewer wants to investigate such as sexual violence in schools can be inquired about once the interviewer has won the student's trust. It is best not to begin with sensitive questions but to first ask questions that will allow the learner to open up to the interviewer. The interview will go more smoothly when the questions are interwoven as the child tells his/her own story.

Child profile interview guide

1. Personal Data

- What is your name?
- Do you have a nickname that you like?
- How old are you? When is your birthday?
- Where do you live?
- What grade are you in?

2. Self-Perception

- Describe yourself. What are you like?
- What are your strengths and your weaknesses?
- Do you have a personal trait that you would like to change?
- What is it?
- What do you want to be or what do you want to do when you grow up?
- What are your greatest hopes and wishes?
- What do you need to do in order to achieve what you hope for?
- What are the emotions you feel most often on a daily basis? How do you usually feel?

3. Family Data

- Who do you live with?
- What is your father's name (or guardian's)?
- How would you describe your father (or guardian)?
- What is your mother's name (or guardian's)?
- How would you describe your mother (or guardian)?
- What do your father, mother, and/or guardian do?
- How many brothers and sisters do you have?

4. School Experience

- What is the name of your school?
- Do you have any difficulties that prevent you from attending school?
- Do you like going to school? Why or why not?
- What changes would you like to see in your school?
- Do you have friends at school? Who are they?
- How do you get along with your teacher?
- When you make a mistake or you don't understand something, does your teacher help you?
- What do you like doing best in your class and at school?
- Do you have any problems in your class?
- Are you satisfied with your achievements as a student? Why?
- What do you need to improve?

5. Experience at home or in the community

- What is it that you like best at home?
- Do you have any problems at home? What are they?
- Is there something you are afraid of at home or in your neighborhood?
- Do you have somebody to help you do your homework? Who is it?
- What are your responsibilities or chores at home?
- Do you have free time to play at home or in the neighborhood?
- Do you like living at home or in your community?
- Is there something you would like to change in your community?

Mercedes Rodriguez Burgos applied the interview guide presented above with some children at a school in El Salvador. The profiles of a boy and a girl have been selected and included below. The facilitator interviewed the teachers where the interviews were conducted and where the tool had been applied. Teachers shared their feedback on the use of the instrument once the profiles were completed.

Profile of a boy from El Salvador

Antonio is a child from El Salvador. He is almost twelve years old and goes to a public school located in Antiguo Cuscatlan. He is in sixth grade and describes himself as "a kind and understanding person." He acknowledges that one of his strengths is his ability to play soccer that he has been practicing since he was five years old. Antonio says he feels good about himself and does not think there is any personal trait that he would like to change.

As a grown up, he would like to be a professional soccer player because "they get a lot of money just for playing." One of his greatest wishes is that his father would go to the Evangelical church that the rest of the family belongs to. He also thinks that he needs to show more effort in order to achieve his goals; that is, practice more soccer and pray to God so that his father may accept going to church.

Antonio lives with his mother, father, and eighteen year-old brother with whom he gets along quite well despite the age difference. His father is an engineer and he describes him as a good person who helps them. His mother works in the store that has been set up in the same house in which they live. He describes his mother as an honest person.

As for his school, Antonio reveals that he likes it because “it is big and they teach him good things.” He maintains that he has many friends and that he gets along well with his classmates. As to his wish to change something at school, he would like “to have the basketball court changed into a soccer field.”

Regarding the relationship with his teachers, he states that he feels at ease with them and can ask questions when in doubt. He likes paying attention and participating in class. In general, he is satisfied with his achievements; however, he acknowledges that language arts are “hard for him.” He admits that he should work harder in that subject.

Among the responsibilities he has at home, he helps out at the store and cleans up. When he finishes his homework early, he has time to play soccer. But this does not occur everyday because he usually has a lot of homework. Antonio assures that he likes living at home and in his neighborhood and that there is nothing about them that causes him any concerns and everything appears all right.

Profile of a girl from El Salvador

Ana is a twelve year-old girl from El Salvador who is in seventh grade at a public school in Antigua Cuscatlan. She describes herself as somebody who is “happy, sometimes angry, and quite shy.” She identifies as one of her strengths her ability to get along well with most people. Some of the traits she would like to change about herself are to be less boring and shy. Ana would like to be a dentist or a “midwife”. She acknowledges that she needs to study and make efforts to achieve this goal. One of her greatest wishes is to “become an important person.”

Ana lives in a low-income community characterized by overcrowded living spaces and the lack of basic services. She lives at home with her mother, stepfather, grandmother, three aunts, her four-year-old brother, and eight year old sister. Her mother works in a small restaurant that sells “pupusas”, a Salvadoran food, and her stepfather works in a factory. Her grandmother and her two aunts work at home making tortillas. One of the problems that Ana acknowledges having at home is when the adults fight and do not talk to each other.

In the mornings, Ana is responsible for taking care of her younger siblings, which is why she attends school in the afternoons. She is responsible for preparing their food, making sure they do not hurt themselves, and that they do not go out in the street. Ana acknowledges that it is hard to get along well with her siblings; they do not all play games together. Besides taking care of her siblings, she is responsible for washing dishes, making the beds, cleaning, and doing some shopping.

As for her achievement at school, she says she is satisfied, although she admits she could “do better.” She maintains that some math concepts are difficult for her, so she needs to pay better attention in class. This is not always an easy task for her because she cannot concentrate due to the noise her classmates make. Regarding her relationship with her teachers, she points out that it is quite good. She feels she gets their support and they help her review subjects that she did not understand very well.

She likes her school because she has quite a few friends, both girls and boys. The school is big and she feels she is learning there. However, she would like to have space to play softball that is her favorite sport. She would also very much like for the toilets to be more hygienic. One of her aunts, the one who is unemployed, helps her with homework. Her mother cannot help her because she did not finish first grade herself.

Ana seldom goes out of her home. She assures that her mother doesn't like her playing outdoors because "there are many drug addicts in the alley where she lives." In spite of this, when her mother is at home, sometimes she goes out to play with a neighbor that is her same age.

The young girl assures that she likes living in her home and her neighborhood, though she wishes they would fix the wall in her house that was damaged during the last earthquake, and that they would install lighting in her neighborhood streets. Ana reveals that she often feels sad and disappointed which is why she remains silent for long periods of time. However, she doesn't quite manage to identify clearly what causes these feelings.

Some reflections made by a female and a male teacher regarding the Child Profile Tool

Both teachers who were interviewed agreed that the tool "does work". They revealed, independently, that the information in the Child Profile is useful, especially in certain situations. Some of these are mentioned below:

- It is important to be aware of children's birthdays in order to celebrate each one of them on their special day. This means a great deal to them and it is a motivating factor because "in many instances, they are not even celebrated at home." Based on this information, some activities such as collective birthday celebrations may be organized, "even if it were only every three months."
- Data obtained through the category Self-Perception, offers the following benefits: by getting to know the children better, the relationship between teacher and student may be more sensitive and trustful. This, in essence, helps improve the learning process and minimize inappropriate behavior. Likewise, it helps establish better relationships between girls and boys which results in an improvement in teamwork allowing the integration of both sexes in work groups, mixing boys and girls who are considered "more active" with those who are quieter and hard workers.
- The information obtained about self-perception also allows one to observe changes in the children's behavior and their emotions over time. These changes may be indicators that something is happening when there is evidence of sudden or abrupt changes. By knowing this, teachers can look for ways to help them and reinforce their good qualities.
- The category Family Data provides explanations for certain behaviors that are inappropriate for boys and girls. For example, "when they fall asleep in class, or show aggressive and rebellious behavior." Likewise, Family Data provides indicators on how to treat students knowing that boys and girls "achieve better academically when they are treated well." It is evident that a nurturing attitude helps motivate boys and girls at school.
- This data offers the opportunity to gain awareness of the type of work that many boys and girls do outside school. The fact that they work has a direct relationship with the lack of motivation and interest in school because they do not perceive an immediate benefit from attending school compared to the money they earn working. Teachers may develop strategies in order to motivate them not to drop out from school. This data also helps explain the reason why so many students do not complete homework.

- The category Family Data together with Home and Community Experience offer inputs for developing activities with the Parents' Association ("Escuela de Padres") to address problems and concerns the students may be having inside or outside school. This provides an opportunity for parents to examine the type of relationship they have with their sons and daughters and to reveal their "weaknesses as fathers or mothers." Also, parents are interested in talking about their problems in the community or neighborhood.
- Another benefit is that this data promotes equal treatment towards boys and girls on the part of the parents, especially in the division of household chores. Usually girls are overloaded with responsibilities at home, but this situation is improving through the Parents' Association ("Escuela de Padres"), where they are made aware of the fact that "girls and boys are equal, and therefore should both be treated equally."
- The item Home or Community Experience offers information related to how children live, specifically in relation to space and "free" time outside of school. This data helps explain the some students' behavior at school. For example, when children are restless in class or they like playing a great deal, it is due to the fact that at home or in their neighborhood, they do not have the opportunity, time, or space to play.
- The category about School Experience favors student-teacher relationships, helping students build trust with their teacher that allows them the confidence to ask their teachers for help when needed.
- Being aware of the areas in which children would like to change their school allows teachers and others to identify certain fears or insecurities they may have due to the school environment. Girls, for instance, feel "insecurity and embarrassment" because the restrooms are located adjacent to the boy's restrooms. Given this proximity, the boys tease and bother the girls while using the restroom. Frequently, girls ask female teachers to accompany them to the restrooms. Knowing this kind of information allows teachers to take action to correct the situation.

MAPPING INSTRUMENTS

Mapping Instruments

Activity: Transect Walk

Time: 40 minutes

A transect walk is an organized walk that students and teachers take through classrooms and the school compound. During the “walk” they observe, ask questions, listen, and identify problems. When the walk is completed, they discuss ways to address identified problems. The school environment and physical plant can be used to create a transect map. Factors identified that affect teaching and student learning should be highlighted to facilitate the discussion.

What information a transect walk can highlight:

- The layout of the school physical plant;
- The condition of the school; and
- Items that influence students learning and participation in school.

How to do a transect walk:

Steps

1. Create different kinds of groups of students to participate in the transect walk. Groups can be formed by gender, age, or by grade level. Limit groups to 6-8 students.
2. Walk around the school, observing, questioning, and discussing the conditions.
3. Draw a map of the things that were noted on the walk.

Materials needed:

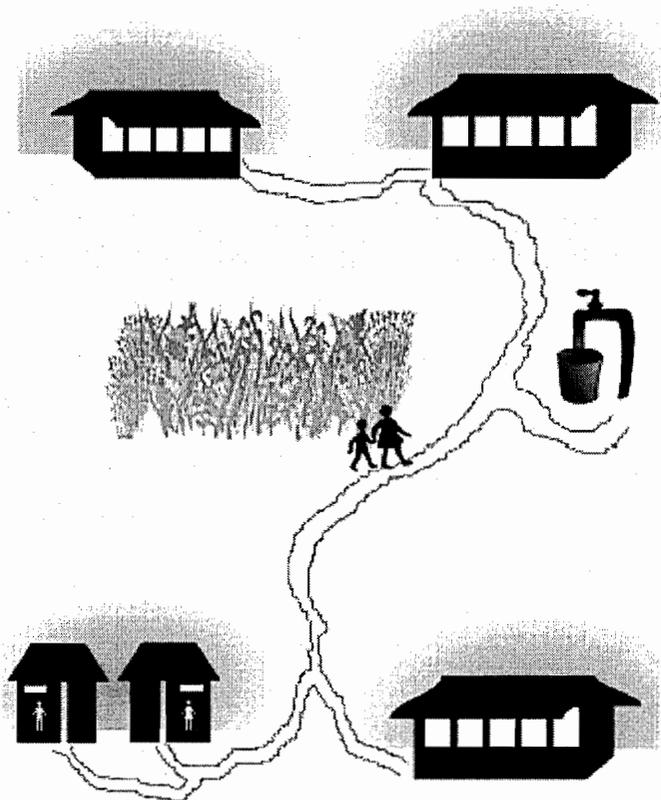
- Papers, pencils, rulers, erasers

Using the information:

1. If there are no latrines, where do the girls go to use the bathroom? Is the area secure? What measures can be taken to make certain that girls are safe when they use the bathroom?
2. If there are latrines but there is an insufficient number or they are in poor, unsanitary condition, what do students use instead?
3. Do boys and girls use the same latrines? If so, what kinds of behaviors go on when the girls are using the latrines?
4. Are villagers allowed on the school compound? Are there men who hang around the school?
5. If there is no water, where do the students have to go to fetch water? Is the path secure?
6. If there are no security fences, what prevents outside distractions or outsiders from coming onto the school grounds? What prevents younger students from wandering off?
7. Are there differences in the condition of different classrooms? Do some classrooms have better materials/supplies, more chairs or desks?
8. Are the conditions of the school dangerous to the students, e.g, broken glass, dangling roofing sheets, choppy cement floors, snakes, or biting insects, etc?

Hints: Have more than one group take part in this activity and compare their maps. Interesting differences may emerge as probing questions are asked. Pick a time when the rest of the school is in session to do a transect walk. This helps avoid drawing a group of curious students, which can create distractions.

Example of a transect walk map:



Sample Observations

- Latrines are unsanitary – students, especially girls, prefer not to use them
- Girls walk to the well 3xs daily to fetch water
- The school compound is not secure – young village men hang around the school grounds to chat with girls and engage boys in work
- Boys and girls walk up to 5 miles from the village to the school

TEXTBOOK AND CURRICULUM
ANALYSIS

Textbook and Curriculum Analysis

Textbook Analysis of Equity Instrument

Textbook / Subject: _____

Textbook / Level: _____

QUANTITATIVE ANALYSIS		
Section	Number of Girls or Women	Number of Boys or Men
Pages _____ to _____		

QUALITATIVE ANALYSIS		
Representation	Girls or Women Key Word(s) Describing Activity	Boys or Men Key Word(s) Describing Activity
Family role and relationship		
Professional activity		
Role Models		
Personal characteristics		
Cognitive ability and achievement		
Stereotyping language		

Example of the Instrument Applied in El Salvador

Textbook / Subject: Rights of the child and adolescents, module in civic education and human rights N 7. ED-UCA and IIDH

Textbook / Level: Middle School

QUANTITATIVE ANALYSIS		
Section	Number of Girls or Women	Number of Boys or Men
Pages 34 to 38	5	7

QUALITATIVE ANALYSIS		
Representation	Girls or Women Key Word(s) Describing Activity	Boys or Men Key Word(s) Describing Activity
Family role and relationship	<i>Housewife/caretaker</i>	<i>Provider/ Breadwinner</i>
Professional activity	<i>Invisibility</i>	<i>Leader</i>
Role Models	<i>Traditional</i>	<i>Traditional</i>
Personal characteristics	<i>Passive</i>	<i>Active</i>
Cognitive ability and achievement	<i>Invisibility</i>	<i>Traditional</i>
Stereotyping language	<i>Invisibility</i>	<i>Visible</i>

In El Salvador, a participant in the EIC training, Ana Maria Nafria, who develops education materials for the Ministry of Education and for the Central American University in San Salvador, applied the instrument to analyze materials produced by the University on human rights for children that are used by educators in middle schools. She also used the instrument to inform her own practice in the development of new curricular materials. Below is the analysis she completed.

1. Description of Material

- Title of material: "What is the International Convention on Children's Rights?"
- Number of pages: 34-39 (Note: ideally a greater number of pages should have been reviewed)
- Type of material: didactic/teaching material

2. Analysis

The document was analyzed through the application of the EIC Textbook Analysis of Equity Instrument. The analysis of the document's illustrations is presented below, followed by the study of the text's linguistic content. At the end, there is a summary of the conclusions.

Analysis of the Illustrations

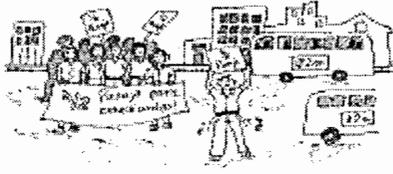
The pages analyzed contain three illustrations in which appear eleven people. Of these people, seven are men (one man, two boys, and four adolescents), and four are women (one woman, one girl, and two adolescents). These numbers represent a certain priority in portraying males. However, what calls ones attention is the following:



In the first picture, a woman is portrayed. She is a mother who is breast-feeding her baby while she watches over her other son. This depicts the stereotype of women in their role as mothers and caretakers of their children. In addition, this picture portrays a woman who appears to be of a lower status than the man in the next picture.



In the second picture, we see a father with his son and daughter leaving school. Here, the father represents the figure that takes care of tasks outside the home (bring children to school, look over their education, etc.). The man is depicted as an active person and appears to have better education than the woman in the previous illustration.



The third picture represents a group of students in a rally. It alludes to the rights of youth to think and act freely. In the group, only the front row of adolescents is well defined: three males and two females. But, in front of them, there is one young man who seems to be the leader of this protest. Consequently, the picture shows twice as many young men (4) than young women (2) and clearly depicts male prominence and leadership.

In conclusion, the pictures reflect stereotypes that need to be eliminated, since they maintain female adolescents in the background (both in number and in attitudes) compared to the male adolescents. The adult woman is portrayed as passive, dedicated to childcare. There is no sign of equity in the performance of domestic roles.

Analysis of Language Used

In order to analyze if there is gender equity in the language used in the text, that is, what is expressed through words not images, what was taken into account is stereotyping language. The assumption was that given the topic and content of the text (specifically the rights of children) that logically there would appear very little or no mention of professional activities, personal characteristics of each gender, or the various cognitive capacities of children. However, it was surprising to verify that in a text about children's rights so much stereotyping language would be used. That is, there were enough elements that could be assessed as sexist language despite efforts made by the publishing team to avoid it. The following was observed:

Out of 41 Articles that deal with the rights of children, in all of those using nouns and adjectives to designate people of one gender or another, only masculine forms of articles, nouns, pronouns and adjectives are employed when speaking in general terms. Below, the Articles are listed by number, following the sequential order in which they appear. (The examples follow grammatical rules in Spanish that do not translate into English, so the intended meaning is in parenthesis.)

- Article 25: "if the boy is..." (use of "el niño"/boy to imply child)
- Article 9: "separated from his fathers" (use of "los padres"/fathers to imply parents)
- Article 10: "both fathers" (use of "padres"/fathers to imply parents)
- Article 18 "both fathers" (use of "padres"/fathers to imply parents)
- Article 30: "for those boys that" (use of "los niños"/boys to imply children)
- Article 3: "the boy's interest may be.." (use of "el niño"/boy to imply child)
- Article 20: "the boy/girl" (only the masculine article was used "el")
- Article 35: "the sale of boys" (use of "los niños"/boys to imply children)
- Article 12: "matters that affect him" (masculine not feminine as well, "her")

In the rest of the articles, it is evident that an effort is made to avoid sexist language by using the form "niño/a" (boy/girl), but they forget to do likewise with the articles (feminine and masculine) that precede the noun: "el niño/a" and "los niños/as". The correct form would be: "el/la niño/a"; "los/las niños/as", or using parenthesis as in "los(as) niños(as)". (In English, inclusive language would utilize boy/girl and he/she.)

In summary, in at least 12 cases, only names in the masculine form appear when making reference to both genders; only once was girls ("las niñas") and childhood ("la niñez") properly mentioned.

All other references to people (in 22 cases) use the masculine article ("el, los" he/they) and have added the endings of feminine forms (/a, /as) to the noun ("el niño/a, el maestro/a", etc.).

Based on the findings above, corrections should be made not only in the articles used when referring to children's rights, but also in the rest of the text. The purpose is to avoid the use of words that refer only to males when speaking in general terms. An effort should be made to make language more inclusive.

Designing the Future Together: PRA and education policy in The Gambia

EILEEN KANE, LAWRENCE BRUCE AND
MARY O'REILLY DE BRUN¹

Chapter 5 describes the experience of applying participatory research to issues relating to girls' education in The Gambia. Underlying the research project, the authors' concerns included: how to generate useful and convincing information for policymakers while leaving something behind for the community; how to build a sustainable training component that goes beyond cookbook replication of methods; and how to ensure cross-sectoral policy implementation necessary to guarantee successful outcomes for girls' education. The research exercises illuminated existing socio-economic and socio-cultural barriers to girls' education, information which influenced significant revisions in Ministry of Education policy and which are summarized in the chapter. In addition, community involvement in the PRA process encouraged previously muted voices to be raised and heard in village discourse, perhaps for the first time. Initial concerns about the implications of 'provoking' communities to reassess sensitive issues appeared unfounded; 'internal barometers' within communities influence what can or cannot be placed on the community agenda. Chapter 5 concludes by emphasizing the role of PRA in a long-term process of facilitating information flows, both by challenging the 'expertise blindspot' through raising the value of community opinion, and by encouraging open and honest dialogue between a range of interest groups within communities.

The problem

Nearly a billion adults in the world today cannot read and write and 300 million school-aged children are not in school. Two-thirds of those who cannot read and write are women; 60 per cent of children not in school are girls. Research has shown that investing in girls' education is the single most important investment which countries in the South can make to improve girls' futures and their quality of life (Thomas, in Stromquist and Murphy, 1995; Schultz, 1989). Most donor agencies and governments are now seriously concerned about improving girls' school access, retention and achievement, but are hard pressed, both in terms of information and resources, to identify the operative constraints in a particular region and to identify, among the myriad prevailing strategies, the most helpful interventions.

Experience has shown that in the right circumstances, RRA/PRA can be the most effective strategy for producing valid, timely information and appropriate, sustainable action. It seemed to us, the authors, from our very different perspectives, that a careful use of this approach might help to

provide data on problems and suggest possible options to policymakers and planners, and at the same time help communities to address some difficulties which are far more effectively dealt with at local level.² The chapter gives an account of our³ experience of an ongoing project in The Gambia, with some additional lessons from Eritrea and Mauritania.

Challenges

In all our projects to date, we have had several basic challenges. Some of the issues which concerned us with this project were:

- how to adapt the methods to the study of educational problems;
- how to see whether they worked, while operating in a situation in which we had nothing to bring to the community except a common trial-and-error learning experience (no funds were allocated for implementing any community initiatives which might emerge);
- how to generate information for policymakers while simultaneously leaving something useful behind for the community;
- how to do all of this in communities which had not asked us to come (but which, for the most part, cooperated most enthusiastically);
- how to relate our findings to policymakers and planners who were more comfortable with quantitative studies;
- how to handle the issue of 'representativeness' which many people mistakenly think cannot be a feature of so-called qualitative methods;
- how to aggregate data across communities, using a more participatory approach to help individual communities develop action plans which were unique to their circumstances;
- how to give something back to the community in what have been, so far, data-collection missions;
- how to leave behind a trained body of people who could carry on something better than a cookbook replication of the approach;
- how to incorporate appropriate training in theory, in order to enable PRA practitioners with little experience or status to make effective cases to policymakers and donor agencies for the use of PRA; and
- how to get multi-sectoral cooperation when working with one ministry; for example, installation of wells, which is not a Ministry of Education function, can release girls from time-consuming water-bearing tasks.

We addressed some of these challenges by:

- (1) Incorporating PRA methods with other methods such as surveys. Ideally we would have used PRAs to create better surveys, from which we would then have identified issues and areas worth pursuing further through PRA approaches, thus using them iteratively. As it happened, time constraints were such that we used them simultaneously, so they complemented, reinforced and sometimes contradicted one another, leading to new challenges. The use of surveys, although not so important in The Gambia, satisfied planners' hunger for numbers, 'objectivity', 'instruments', etc., while providing us with methodological triangulation.
- (2) Combining cluster sampling and non-random purposive sampling in order to benefit from the quality of random sampling with the depth of

understanding provided by deliberately selected cases.⁴ We also used the community map (made by local people) as a sampling frame, and the well-being card sort (eliciting local people's categorization of 'well-being' and their disaggregation of community members, using cards, according to this categorization) as a reference for other techniques, in order to ensure that people from a variety of social categories were represented in whatever groups we were working with. For example, when separate focus groups formed, we needed to know if there was an even socio-economic spread in each group.⁵

- (3) Standardizing ways of recording by numbering each technique: for example 'No.23: Solutions/Sources of Help Matrix with Women'. If researchers chose to work with that technique, it was then called '23' and recorded on a standardized form. In addition, we found that we could aggregate certain items by scoring the order and weighting of items presented in matrices,⁶ for example community educational priorities. At the same time, people were free to explore unique community perspectives, and develop an iterative sequence of techniques appropriate to each local situation.
- (4) Insisting on including an adapted community-action plan component, in which we worked with the community to assess options for problems which they themselves could address, helped local people to identify and access community resources, create an action plan and mobilize for action. What we have been asked to do, in every country in which we have worked, involves what the theologians would call RRA, albeit in a participatory mode. In this project we recognized the importance of siting an essentially extractive process within a broader community action plan.⁷

Some of these challenges we have tackled more successfully than others. Even among the successful outcomes, we realize that sometimes good will and serendipity were factors that may not be easily replicable elsewhere.

Background and sequence of events

The project began with the anthropologists. PRA's practical data-economizing approach to some standard anthropological methods appealed to the methodologist in us; its emphasis on participatory approaches to constructing an understanding appealed to the penitent in us (we had seen too many hit-and-run, extractive forays by social scientists, even in Ireland, and had, in our time, ourselves carried them out); and probably best saved for another occasion, its fascinating, *à la carte* paradigmatic base – phenomenology, post-positivism and critical theory all rolled into one, as needed – appealed to the outlaw in us. Also, as teachers, we have specialized in demystifying research, and were drawn to the fact that PRA methods could be shared with people who had no research background.

We approached the World Bank with the idea of using this approach to address some of the current issues in girls' education. Our first undertaking was funded in November 1993 as a one-month World Bank, Ministry of Education and UNICEF project. The brief for Eileen Kane and Mary O'Reilly-de Brun was to train 13 Gambians in various research techniques,

including RRA/PRA, carry out research in both the Greater Banjul area and in rural communities throughout The Gambia, analyse the material, produce a study on constraints on, and options for, girls' education, and make recommendations for action. All but the last task were completed within the month; the study, 'Bitter Seeds', took two additional weeks. We also made a video, 'Invisible Voices'.

In the next stage, with the same sponsors, we returned to The Gambia in May 1994 to work with 4 of the original 13 Gambian researchers to develop a process for creating community action plans, and carried out the process in two villages. Out of this came a report, 'Tender Shoots'. The Bank also funded us to make a training video, 'Groundwork' and an accompanying manual.

During this period, the ministry and the World Bank were considering the findings of these reports, and began to implement some of them. One, which arose from community seasonal calendars, was the need to change the timing of school fees payments; these currently fell due during the 'hungry season'.

Interest within the World Bank began to increase. The Economic Development Institute, as part of its world regional seminars on girls' education, incorporated a pilot PRA-training workshop for senior educators, planners and administrators. We were invited to run this, and chose The Gambia as the site for the 17 trainees from Anglophone Africa.

One of the trainees was Omar Faye of Busura, brother of the chief of a village in which we had used PRA and now an enthusiastic advocate of it as a community development strategy.⁸ We invited the people of his village to teach the trainees some of the methods. We had visited the village on a day when 350 girls were being circumcised, including Omar's daughter. Omar pointed out how much school time newly-circumcised girls missed, and the health dangers ('the knife they use on the first they use on the last'). He asked if we could use our training workshop exercises to plan a community-awareness programme. 'I want my daughter to be the last', Omar said. A video, 'Two-Way PLA',⁹ shows the villagers teaching us that day, and how we adapted the rest of the workshop to meet his request.

The methods we used have been subsequently illustrated in a video and manual, and in *Seeing For Yourself: research handbook for girls' education in Africa* (World Bank, 1995b). For the most part, we adapted standard PRA methods, integrated into a sequence which maximized the iterative process.

Findings, learnings, insights

Rights, privileges and constraints

Our first-phase study, 'Bitter Seeds', was so named because, if we learned one incontrovertible fact, it was that girls who were denied access to primary education spoke bitterly and poignantly about that experience. They were perfectly well aware of the opportunities they would not have and the futures they dared not hope for. It became clear that, although 'education for all' is the official aim, from a cultural perspective education for boys is a right (which some are denied) while education for girls is a privilege which

has to be hard-earned. Given the economic situation of The Gambia, and prevailing sociocultural attitudes and practices, for many girls education remains a dream that is well-nigh impossible to realize.

'Bitter Seeds' highlighted key problems associated with girls' education as perceived by communities themselves. We discovered that the high cost of schooling functions as a trigger in decisions about girls' education: when financial constraints dictate difficult choices about which children to send to school, sociocultural considerations about girls' perceived lower intellectual ability, dangers to female virtue, the questionable marriageability of educated girls, potential return on investment, and several other factors (all of which could be countered in isolation and in the absence of financial constraints) come into play. The resulting decision is invariably made in favour of boys. Even locally categorized 'poor' families, who send the highest percentage of boys to school, send the lowest percentage of girls. Education, perceived as a way out of the poverty trap, is rendered more accessible to boys than girls.

We discovered that teenage girls who were pregnant, married or about to be married constituted an 'invisible' segment of the community. While admiring a social map drawn in the sand, a little boy asked 'Where's the girl in that house? Why didn't you put her in?' and the men nearby replied: 'She's fifteen, she's about to be married'. Checking, we discovered that 25 per cent of the girls in the village were missing from the map. This pattern of exclusion was repeated in every village studied, and social maps adjusted accordingly.

This invisibility of girls is echoed in other sociocultural factors which influence girls' participation in education: the lack of female role-models, markedly gender-biased textbooks, too few female teachers. Endless hours of labour in compound and field restrict girls' study time. Their workload is heaviest (and boys' at its lightest) throughout the most intense period of schooling: preparation for exams. Girls fail and drop through the education net.

Even where women are visible, in media, government or business, negative lessons are often taken from their lives. Similar conclusions are drawn, too, from the lives of educated local girls who fail to find employment which warrants the investment in their education. Seen as failures on whom education was wasted, the girls themselves are understandably bitter. They also become targets for anxiety among elders about girls losing traditional values: in one village, a girl plaintively pointed out that wearing short skirts was a fashion, adopted by educated and uneducated alike, and not the 'fault' of girls like herself who go to school. An interesting outcome of this intervention was the suggestion that school uniforms might be designed in-line with everyday traditional local dress and produced locally by women's groups.

Developing community action plans

We named the second phase of the study 'Tender Shoots'. As we spent more time in the community it seemed to us that even bitterness may sometimes give way to hope, that tender things can grow from difficult beginnings. The case studies indicated that communities are capable of

devising and assessing socially acceptable and culturally sensitive 'best-bet' initiatives to address their educational problems, that innovative ideas come from all sectors of the community, and that engagement in the PRA process builds community confidence and promotes general sensitivity to issues of girls' education. Even without any external financial support being promised to the communities, people were willing to mobilize their resources to address education problems, resources like time, energy, labour, interest, concern. In one community, young girls identified a current constraint to school attendance and drew the new cartoon problem: 'No Toilet Door'. They presented this at a community meeting. The following day, researchers noted that young men had made and hung a new door. That is positive action.

We began to see that one of the main benefits to the community of engagement in the PRA process was that it offered people a chance to hear, perhaps for the first time, the voices of those who are often 'invisible' and are certainly not foremost in decisionmaking processes. We were reminded continually that we were dealing with economic *and* cultural factors which inhibit girls' educational participation. We were confronting directly attitudes, beliefs, pride, prejudice and power. A delicate task.

A group of teenage women in Busura decided to form a special association to discuss the problem of teenage pregnancy, to advise each other and to 'try to put a stop to it'. This seemed to be subtle-speak for 'try to stop the men harassing us'. Hot and heavy debate ensued. We became concerned: is this process promoting attitudinal change too fast? What have we started here that we may not be able to support? But our questions simply betrayed our tendency to attempt, yet again, to control the process. If the community had decided *en masse* to discuss the problem, to argue and shout about it, then they were ready for it. Later, in team discussion, we agreed that the selection of a delicate-enough issue like teenage pregnancy by each focus group in Busura indicated that the community as a whole seemed ready to handle an open-forum debate on the topic.

Although villagers may at first have expressed surprise at the girls' initiative and their independent stance, the overall consensus was that this was a positive move. For a group of young girls to take this kind of power into their hands is intriguing, and it would be interesting to be able to assess the strategies they might use to integrate this action into the web of tradition and expectation which presently supports their life.

Confirming the insight that communities have an internal barometer with regard to what can or cannot be safely placed on the community agenda, we found that in the second case-study village, although every focus group agreed that teenage pregnancy was a problem, in not one was it selected for discussion at the level of the community meeting. The villagers, unlike in Busura, were simply not ready to deal with the topic publicly, or perhaps not in the presence of the team.

PRA and gender sensitivity

What else did we learn? That PRA is not automatically gender-sensitive; gender-sensitive participatory research is most often attributable to the

personal consciousness and commitment of those facilitating the research, rather than to the methodology itself. We noticed on many occasions the tendency for women to remain in the background and men to take centre-stage, particularly at all levels of the decisionmaking process. For example, the most discussed problems on the community agenda in Busura were teenage pregnancy and early marriage, closely related issues, yet when it came to community ranking of six priority problems, the elder men vociferously prevailed and these two concerns were relegated to fifth and sixth position. Women, however, raised the largest number of practical initiatives – which in itself acted as a corrective.¹⁰

We became conscious that the gender imbalance within the community was exacerbated by a lack of gender-consciousness among team members. On one occasion, a male facilitator was taking feedback; automatically, he faced the men, with his back to the women, who could not see the charts and who tried in vain to get his attention. We agreed later that training in gender-sensitivity would benefit PRA teams and that integration of gender analysis into the PRA process was a must.

It is also worth noting that gender-sensitive programmes would be able to capitalize on indications that men were beginning to take more responsibility for their part in teenage pregnancies, or were prepared to acknowledge the imbalance in male and female workloads, both of which are central issues in the development of opportunities for girls.

Allied with this is the importance of having both female and male local facilitators who clearly understand how information is disseminated at community level. Relying on a sole source of information is always bound to be risky, as we discovered. When we were planning to take World Bank-PRA trainees to be taught by local people, village men, who tended to make decisions for the entire community, decided upon a 'suitable' time for our visit. What we innocents did not know was that this time was highly disruptive for the women of the community, who were hosting female initiation and circumcision ceremonies for the neighbouring villages. Imagine our dismay when we discovered why the local women were acting a little ruffled as they taught our visitors how to do seasonal calendars, and then hurried back to the bush for their private ceremonial activities. We were in danger of seeming both dismissive and ignorant of local events and priorities but for some skilful facilitation work.

Institutions and information flows

Accessing various local institutions and informal information networks brings a wider variety of people into the PRA process, and local facilitators can best assess the quality and representativeness of the information being shared. As translators of the needs and realities of local people, the latter must be able to articulate this information in an accurate and reflective manner. We have seen too much local expertise lost to inadequate translation.

Accessing external expert advice is another important part of this type of PRA activity. Our experience suggests that it would be advisable to set up a data-bank of information based on the advice required for the types of

options which surfaced in the community action plans. This would allow the facilitators to bring the necessary advice with them, and present it as an integral part of the options-assessment process. It would also be advisable to link in with all the relevant donor agencies active in The Gambia to avoid unnecessary duplication of effort in data collection and analysis; useful information-exchange networks might evolve.

Training and theory

We learned, with one training group after another in communities in The Gambia, Eritrea and Mauritania, that PRA is fun, exhausting and exhilarating in equal measure. These processes can bring together diverse ethnic groups, can regularly bridge the gender, poverty and marginality gaps to engage local people in a productive and energizing dialogue with each other and with policymakers.

We have also learned that theory is an important part of training, and we were baffled that many people attending the workshop on PRA and policy at IDS Sussex were antagonistic to the idea ('We don't need theory'; 'focusing on theory is what led the social sciences to become irrelevant'; and 'people will create their own theory').¹¹ However, we stick to our guns; deriding theory will not make it go away. This is a difficult point for anthropologists. We know that there is no such thing as 'pure' theory, because theory is affected by, and affects our local world, and we know that PRA is not atheoretical; its paradigms, while broader than most, are western (despite the claim that PRA arose in the South) and it draws from methods firmly grounded in both post-positivism and phenomenology.¹²

As facilitators, we take great care to let people know that they can alter the methods, the sequence, the applications or, indeed, discard some altogether and replace them with new ones. Not to introduce them to the rest of the package smacks of paternalism; how are people to know that they are free to create new paradigms if they do not know that paradigms exist, are debatable and can actually benefit from input from competing cultural perspectives and cognitive systems? How are they to know that challenging the ones we are using and substituting others is a legitimate exercise? Are we just helping people to engage in low-level tinkering with research tools, or are we also equipping them to understand the fundamental assumptions underlying PRA so that they can fight back if they like, add some different viewpoints, or even help us to make sense of the stewpot of contradictory paradigms from which we now draw? Do we want them to be able to participate in our international meetings, if they wish, and contribute to the literature on the same footing as those of us who now attend them, or do we want them to be craftspeople: paralegals rather than lawyers, paramedics rather than doctors?

For those of us who are westerners, what about our own learning? The point has been made that [all human beings] are struggling to apprehend, organize and interpret their perceptions of reality through models that have to some greater or lesser extent been rendered inadequate. How are we to make them more useful, except by discussing idea systems with our partners everywhere?

This may seem an academic issue, but it has practical consequences, particularly for people who are functioning in isolated areas, without extensive PRA-support networks, and perhaps trying to work in a hostile bureaucratic environment. They are often not well-equipped to deal with sceptics (just saying 'it works!' is rarely enough) and they find it hard to make a persuasive case for PRA to officials who are often themselves prisoners of outdated western notions of 'science' and resistant to anything other than a survey. The people we have exposed to PRA in The Gambia, Eritrea, Senegal, Mauritania and Mali can match beginning practitioners anywhere; they have the necessary technical competence, the enthusiasm and the commitment. We intend, in future, however, to take them further along the road, so that they can leave us at the crossroads, if they wish, and know why they are doing so.

Potential for policy

One of the most significant outcomes of our work was the sheer potential for policymakers. Appropriate government incentives and donor support for community initiatives could be designed along the lines of the community action plans produced by local communities, which provided tentative community-specific blueprints for sustainable development in the area of girls' education. For example, women in Missera suggested starting a communal farm. They would divert one-half of the income derived from the sale of the farm produce towards school costs for girls: uniforms, lunches, books etc, but to farm effectively, they needed farm inputs, pesticides and materials for fencing. Acquiring these was beyond their capabilities. This is where government and donor agencies can support local initiatives and make the ideal of 'partnership in development' a reality – but were any policymakers listening?

What triggered the changes in education policy?¹³

Yes, we were listening, and trying to work out how best to respond to the insights emerging from the PRA process.

For many policymakers, it has been quite a leap to perceive locals as experts in their own right, and potential partners in development projects. For us here in the Ministry of Education, PRA has been central in bringing this perspective forward. Beginning in the rural community and building on what local groups define as important problems and workable solutions, PRA enables us to tap into both external and internal resources and expertise in such a way that education initiatives designed on this integrated basis have a much better chance of success.

The Ministry of Education has taken part in PRA activities because it has realized that even the best strategies will achieve only modest results unless local communities, community-based groups and the people as individuals play increasingly assertive roles in defining, managing, implementing and monitoring the development efforts that affect their lives. In this regard, the 'Education For All' mid-decade review of The Gambia's Education Policy¹⁴ placed a strong emphasis on community participation and

involvement in institutional and regional education management through existing local structures.

The revelations and findings of these PRA studies have helped us at the ministry level to rethink and reshape the education-policy objectives in line with the aspirations of the Gambian communities. A Girls' Education Programme, designed to increase girls' enrolment in primary school, was adopted by the ministry. The programme was conceived as a series of measures to:

- increase the proportion of women in the teaching force;
- support the development of unbiased educational materials;
- actively encourage girls to enrol in science, mathematics and technical courses; and
- incorporate family-life education programmes into the junior-secondary school curricula.

The PRA process and findings also made it possible to re-examine specific segments of the education policy that deal with girls' education within the context of primary-school enrolment, retention and performance. The revised policy for renewed education included the following measures:

- *The entry age to primary school will be lowered from seven to six by the end of the policy period.* This will allow more girls, particularly in rural areas, to complete the basic cycle before reaching the traditional marriageable age of fifteen.
- *The teaching force for grades 1–6 will have an increased proportion of qualified female teachers.* The ministry, in collaboration with The Gambia College School of Education, has introduced remedial programmes (Remedial Initiative for Female Teachers (RIFT) for female students with lower academic performances both in their school-leaving examinations and in the college's selection examination for the Primary Teacher's Certificate programme. This represents a response to the need for female role models, yet the PRA revealed that many rural parents prefer female teachers to teach their girls. The studies also showed that the security of girls in school is increased by the presence of female teachers.
- *School facilities will be planned and expanded through an assessment of the educational needs of the country, ranging from the establishment of new primary schools to the location of junior- and senior-secondary schools.* This addresses the PRA insight that not having a school within easy reach of home deters girls' enrolment as parents are concerned about their daughters' safety.
- *In order to increase and improve quality and relevance in the Islamic Education (Madrassah) system, the ministry will harmonize its curriculum with the national curriculum and extend teacher-training opportunities to potential Madrassah teachers.* The preference for Islamic education was highlighted by many rural parents. The Madrassah attracts a significant number of children, especially girls.
- *The ministry will pursue objectives through a largely decentralized process, involving beneficiaries (in other words, girls and community members) as principal actors in planning, implementation, monitoring and evaluation of the Girls' Education Programme.*

- *Implementation of interventions will be pursued through ongoing policy dialogue on key issues affecting girls' education and by launching an advocacy and social mobilization campaign.* The ministry recognizes that the success of development interventions will depend on the degree to which local groups and communities are:
 - i) enabled and permitted to organize, participate in and influence development priorities;
 - ii) have access to natural and financial resources; and
 - iii) participate in the generation and extension of productive technologies.
- *In line with the government-initiated Strategy for Poverty Alleviation (SPA), the Girls' Education Programme will be coordinated by actors at the national, divisional and community levels through broad-based education sub-committees.*
- *An Information, Education and Communication (IEC) package with PRA methods is being developed in order to further and promote constituent relations between communities, development partners and government, and encourage policymakers to be more responsive to the priorities of the people.* Under the SPA, programmes to promote local capacity-building have been launched through the participatory development initiative (PDI) mechanism. The PDI encourages local communities to be more assertive, to rethink their own roles, to organize their own activities better, to clarify their priorities, and to link up with similar organizations which can help them design and implement their priority programmes.
- *In response to the barrier presented to parents by school fees and costs, there will be a 50 per cent reduction in tuition fees at the junior-secondary school level.* In addition, user charges (school fund, textbook rental etc.) at the primary level are now payable after the harvest in January/February when rural parents can better afford to meet these costs. Relaxing the requirement that girls wear uniforms – through a change in the Education Act – has encouraged greater participation of girls in schooling. Reflecting insights gleaned from the PRA process, the new policy encourages parents to become involved in the design of locally-appropriate uniforms, especially for girls.

Designing the future together

Projects designed 'outside' the community forum, without the participation and continuous involvement of villagers toward whom the project is directed, have all too often failed. One of the main reasons for this lack of success was the 'blindspot' about expertise.

The adapted PRA process revealed that rural communities have a wealth of experience and knowledge in all areas of development, especially where these concern their own livelihood. The hidden problem was that no-one had sought their opinions, no-one enquired about their problems in educating the girl-child, no-one explored how they might go about solving their community problems, no-one asked what their community development aspirations and priorities were, and no-one asked what resources were at their disposal which, if efficiently utilized, could bring rewarding changes in their lives.

These were exactly the areas explored in the two Gambian communities of Busura and Missera, where PRA methods were used to mobilize community action for girls' education. The PRA approach was able to initiate honest and straightforward dialogue with a cross-section of the communities. It relied on the knowledge and expertise of the villagers to reveal and prioritize their own educational problems. The village elders opened up (a rare phenomenon); young men gathered around to discuss issues affecting parents' willingness to send and retain girls in school; the women converged on their traditional credit clubs (*Osusu*) to discuss their daughters' education; girls in the primary schools sat together to chat about why they were considered as threats to village society; and, most importantly, all these groups sat together to discuss at length the community's educational problems.

The girls (voices of the powerless) spoke for the first time about actions they wanted to embark on regardless of whether their elders were around. The village elders endorsed the action-oriented initiatives proposed by the young men, who would have taken unilateral instructions from the village elders, a long-held tradition within the village environment.

Overcoming the expertise blindspot has proved positive, and we might expect that as soon as local know-how is requested villagers participate eagerly. This is usually the case, but we cannot afford to ignore the impact of development history nor the legacy of poverty. Many communities suffer from a lack of confidence, low community-esteem, and do not experience themselves as empowered to make decisions, put forward suggestions, or implement courses of action. We are still working toward empowerment and away from a dependency mentality.

Nevertheless, people were obviously fired up by their experience of and participation in the PRA process. Surrounding villagers commented that:

We are the luckiest to have the team and to learn new ideas with them. We have seen our problems and discussed them as one body which we have never done before. I hope we will put into practice all we have learned here and give our girls the chance to benefit from it (Missera men).

The hope for a better future must not be overestimated. Villagers will need encouragement to face the difficulties they are bound to encounter when struggling to put new solutions in place. Hope alone will not suffice. On-going interest and support from the Ministry of Education and others, monitoring and evaluation of community action plans, and appropriate financial support are clearly needed to ensure that the human energy which fuels community initiatives is not allowed to dissipate.

To the policymaker amongst us, it is clear that the PRA process should not be a one-off approach, but a repeating experience building on previous insights and research findings. This would enrich the interaction and relationships of change agents and the communities where future interventions are planned. These processes, once mastered and strengthened, should be replicated in other communities. To do this, more researchers need to be trained in PRA methodologies for community mobilization. All sectoral boundaries are open to these processes. Most importantly, once these

methods are established in these sectors, they should complement one another. For instance, imagine women's communal farms and gardens using their produce and proceeds of sales to finance the education of the girl-child and in the process improving the nutritional standards of the community children.

The potential of rural communities as partners in development has always been underestimated by the policymakers. The impact of policies geared towards the education of the girl-child has, for a long time, consequently fallen short of expected outcomes. Sectoral policies should attract and win the support of rural communities with a bottom-up approach. Interventions should be designed in consultation with rural local experts who would then be in the forefront of making these interventions operational. PRA creates the atmosphere for this to happen.



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GUIDE TO GENDER-SENSITIVE INDICATORS

CHAPTER 1 INTRODUCTION TO THE GUIDE

1.1 INTRODUCTION

This Guide explains why gender-sensitive indicators are useful tools for measuring the results of CIDA's development initiatives. It concentrates in particular on projects with an end-user focus, and shows how gender-sensitive indicators can and should be used in both gender integrated and WID-specific projects, and in combination with other evaluation techniques. After introducing concepts, the Guide reviews the techniques of choosing and using indicators at the project level, so that CIDA staff can utilize them as an instrument of results-based management. The key questions addressed here are:

- What are gender-sensitive indicators?
- Why should CIDA use them?
- What are the types of such indicators?
- What are their limitations?
- How can they be used at the branch and region/country levels and in particular in projects with an end-user focus?

1.2 HOW TO USE THIS GUIDE

You will make the best use of this Guide by first reviewing the concepts and the background to indicator use (chapter 2). This will make it easier to match development objectives and indicator categories (chapter 3) with your own mandates and particular tasks. It should then become clearer why and how gender-sensitive indicators will be relevant to your work at all levels, from branch and country/region to project (chapters 4 and 5). To assist you in reflecting on the discussion, summaries of chapters 3, 4 and 5 have been provided.

To try out the ideas and techniques covered in this Guide, you can turn to the examples and scenarios provided in the Annexes. To assist you in further exploring the conceptual and practical aspects of indicators, a comprehensive bibliography has been included. A shorter project level Handbook on gender-sensitive indicators, for quick reference, has also been produced to accompany this Guide.

The Guide is not intended to give exact answers to all questions on indicators, or to set up a format for indicator use that should be used or replicated in all instances. Instead, it is intended as a document that makes suggestions about indicator use and how indicators might be adapted for different purposes. The authors' hope that it will be a helping hand rather than a blueprint model.

CHAPTER 3 WHAT ARE GENDER-SENSITIVE INDICATORS AND WHY ARE THEY USEFUL?

3.1 INDICATOR CONCEPTS, THEIR HISTORY AND PRESENT USE

3.1.1 What is an indicator?

An indicator is a pointer. It can be a measurement, a number, a fact, an opinion or a perception that points at a specific condition or situation, and measures changes in that condition or situation over time. In other words, indicators provide a close look at the results of initiatives and actions. For this reason, they are front-line instruments in monitoring and evaluating development work.³

Bauer (1966) described social indicators as "statistical series, and all other forms of evidence....that enable us to assess where we stand and where we are going with respect to values and goals, and to evaluate specific programs and determine their impact." This definition is useful because it recognises the normative nature of indicators, in that a change in a particular direction can be interpreted as "good" or "bad". For example, a rising birth rate may be interpreted as good in one country but bad in another. It also recognises that indicators can come from "all... forms of evidence", both quantitative and qualitative; and that indicators must measure changes over time. Because of their normative nature, care must be taken in defining the norm or bench-mark implicit in any indicator and against which change is measured. For example, in examining the status of women, is the norm the situation of men in a particular country, or is it women in other countries?

Gender-sensitive indicators have the special function of pointing out gender-related changes in society over time. 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. Because use of indicators and other relevant evaluation techniques will lead to a better understanding of how results can be achieved, using gender-sensitive indicators will also feed into more effective future planning and program delivery.

3.1.2 Political bias and indicator use

As tools for measuring social change, indicators are subject to political forces. It is important to recognize before using indicators that all indicators have their own political heritage and bias. This is important because certain types of indicators, particularly so-called quantitative indicators, receive legitimacy as they are considered 'objective'.

3 See Annex 1 for the difference between an indicator and a statistic.



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However, gender specialists have pointed out that the use of economic indicators, for example in relation to employment, has until quite recently been used in a way which has excluded women's work from analysis (Waring 1988). This serious omission has been seen as a consequence of the fact that most censuses and large scale surveys, particularly in developing countries, are organised and carried out by men and for male policy-makers.

There have been two responses to this gender-bias. Firstly, gender specialists have promoted the collection of sex-disaggregated data which has been used to challenge gender bias in indicator use and to advocate for policy changes. Perhaps the best known example of this is the UN publication *The World's Women 1970-1990*, the preface of which states that its central concern is to (UN 1991: xi): "provide(s) concerned men and women with information they can use to inform people everywhere about how much women contribute to economic life, political life and family life and to support appeals to persuade public and private decision-makers to change policies that are unfair to women." The 1995 UNDP *Human Development Report* makes similar statements about the need to bring gender-sensitive indicators to the attention of policy-makers as a first step towards changing policies biased against women. Here, gender-sensitive indicators are not ends in themselves but a political tool to be used to challenge the status quo.

Other gender specialists, particularly from the disciplines of sociology and anthropology, have argued that indicators by themselves are insufficient to capture women's experience, for example in areas such as women's empowerment or participation (Reinharz 1992). They argue that policy-makers need to pay more attention to women's experience, towards which indicators can be a pointer.

This Guide takes a stance that includes both of these positions, looking at how a wide range of indicators can measure changes in gender inequity and women's status over time.

The political nature of indicator use must be kept in mind particularly in relation to qualitative indicators, because it is often claimed that such indicators are 'subjective' or unreliable and therefore of little worth. The truth is that such indicators are essential for promoting stake-holder participation in projects, as discussed in section 3.2.3.

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Most of this on-going work is experimental, and apart from GTZ's work, none is participatory. However, these and other recent explorations of indicators by development agencies have provided useful information for indicator development in this Guide. Readers should also note that CIDA's Performance Review Division is compiling an extensive Handbook on indicators, organized by country, sector and project, with useful information about each indicator.

Sections 3.2, 3.3 and 3.4 now outline some of the practical elements involved in selecting and using gender-sensitive indicators, focusing on qualitative and quantitative indicators, the setting of objectives, and different stages of indicator use.

3.2 CATEGORIES - QUANTITATIVE AND QUALITATIVE INDICATORS

The basic strategy with gender-sensitive indicators is one of using quantitative and qualitative *methods* in combination to measure gender-related changes in society over time.

Almost all of the agency literature on indicator methodology, including CIDA policy, stresses the need to use both quantitative and qualitative indicators for the measurement of gender equity (e.g. CIDA 1994c). However, there are sometimes disagreements about what constitutes "quantitative" and "qualitative" indicators.

In this Guide, we define quantitative and qualitative indicators in the following way:

quantitative indicators can be defined as measures of quantity, such as the number of people who own sewing machines in a village.

qualitative indicators can be defined as people's judgements and perceptions about a subject, such as the confidence those people have in sewing machines as instruments of financial independence.

While this definition is relatively simple, it hides some of the more complex ways in which these two types of indicators are used. For example, "quality of life" indicators, such as those that measure changes in a population's health, education or employment, are often confused with qualitative indicators, because both appear to refer to "quality". In fact, health, education or any other subject can be measured by either qualitative or quantitative indicators. Also, there is sometimes considerable overlap between quantitative and qualitative approaches, making it difficult to tell one from the other. Two ways of distinguishing between these two types of indicators is by their source of information and the way in which this information is interpreted and used.



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3.2.1 Source of information

One useful way to distinguish between quantitative and qualitative indicators in the development field is by the different sources of information they use. Quantitative indicators focus on areas that are easy to quantify, such as wage rates or education levels. Because of this quantitative indicators are usually drawn from censuses, enumerations, and administrative records. **That is, quantitative indicators are extracted from more formal surveys.**

On the other hand, because they are people's perceptions and viewpoints, qualitative indicators are typically obtained from sources such as public hearings, attitude surveys, interviews, participatory rural appraisal, participant observation, and sociological or anthropological field work. **That is, qualitative indicators are extracted from less formal surveys.**

3.2.2 Interpretation and use

A further means of differentiating between these two types of indicators is by considering how they are interpreted and the use to which each is put. Because of their focus on formal surveys, quantitative indicators are usually interpreted using formal methods such as statistical tests, and the results of these tests are then used to suggest changes in policy. Quantitative indicators are often presented in a way that is quite distanced from the events they are describing. For example, examining increases in literacy rates may tell you very little about the incredible effort women have made to become literate. Because they are distanced in this way and are expressed in terms of numbers, quantitative indicators are often also called "hard" or "objective".

On the other hand, in development studies most qualitative indicators are generated by informal studies and the results of these studies are often presented in a descriptive fashion rather than analysed by statistical or other formal techniques, although they are subject to quantification.⁴ Because they describe people's viewpoints, these types of indicators are also known as "subjective" or "soft" indicators. The importance of these indicators is discussed further in the next section.

The two types of indicators are really complementary, and both are important for effective monitoring and evaluation. This is because they can cross-validate and point out problems with each other (see example 1 below).

Whatever indicator is chosen, it must meet two tests, that is the tests of "reliability" and "validity". Validity means that the information that indicators provide must be close to the reality they are measuring. Ways of ensuring an indicator is valid are: 1) common sense; 2) whether the indicator reflects similar findings in different situations; and 3) whether different survey instruments yield or uncover the same indicators. In general, the validity of an indicator can be enhanced by triangulation, or use of multiple sources of information and data. It is in this context that quantitative and

⁴ There has been extensive discussion and experimentation of quantitative methods for the analysis of qualitative indicators, but this has not spread in general to development studies.



qualitative approaches can be fruitfully mixed. Reliability means that indicators used must be accurate and consistent; an indicator is reliable if multiple uses of the same instrument (an interview, a survey, etc.) yield the same or similar results. Whether quantitative or qualitative indicators are chosen, they must meet these two tests to be useful.

3.2.3 Why qualitative indicators?

The importance of quantitative indicators - for example mortality or employment rates - is clear, although as noted in section 3.1.2, such indicators have been criticized by gender specialists for their gender bias. The importance of people's views or perspectives - qualitative indicators - is less clear. Users of qualitative indicators often stress that these indicators are important because they focus on people's own experience. For this reason **qualitative indicators are particularly useful in understanding local people's views and priorities related to development and development projects**. Proponents of qualitative indicators are often interested in establishing such indicators as part of a framework for participatory development which includes local people's views.

It is also often argued that the use of qualitative indicators is problematic because their reliability and validity is suspect. However, reliability and validity of qualitative indicators can be ensured by use of careful survey techniques. Properly developed and interpreted, qualitative indicators can play a significant role in identifying constraints to implementation and obstacles to success, which would otherwise not be readily apparent. It is also often claimed that qualitative indicators, particularly those of poor women, are of little use because such women are not educated or their views are less important than those of men. However, the importance of different kinds of local knowledge, including poor women's knowledge, is increasingly understood as it is realized that ignoring such knowledge is a major reason for the failure of development projects and programs.

The use of qualitative indicators can therefore play an important role in the promotion and understanding of stakeholder perspectives, particularly those relating to women, and in fostering participation. **Developing gender-sensitive indicators in a participatory fashion requires a focus on including people's own indicators of development.**

3.2.4 Qualitative analysis and the limits of qualitative and quantitative indicators

Qualitative and quantitative indicators provide a methodological gateway, but can only achieve a certain level of analysis. Functioning on that level they indicate where future questions and problems might lie. When working with indicators, there is usually a need for further **qualitative analysis** as to why a certain situation exists.



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Qualitative analysis is used to understand social processes, why and how a particular situation that indicators measure came into being, and how this situation can be changed in the future. Qualitative analysis can and should be used at all stages of the project cycle, and should be used alongside quantitative and qualitative indicators.

An example of qualitative analysis is the examination of gender roles, that is the different roles that women and men have in society, how these came into place and how they can be changed. Qualitative and quantitative indicators can reveal certain aspects of different gender roles, but they can only go a certain way in revealing why these roles have come into place and how they can be changed. There are two useful Guides to qualitative analysis, Coady International Institute (1991), and CCIC et al (1991). These are widely available and the reader should turn to them for further information on this important subject.

Two examples will clarify the indicators-analysis continuum:

EXAMPLE 1

Indicators of change in rural India

An innovative study on the incidence of poverty in two Indian villages was carried out over twenty years by Jodha (1989), between 1964 and 1984. Jodha gathered quantitative indicators on household income and used these indicators to chart the fortunes of the different households; the findings from these quantitative indicators were that 38% of sample households had become poorer during this twenty-year period.

Unusually, Jodha also collected qualitative indicators from farmers who were deemed to have become poorer. Poor farmers' qualitative indicators or perceptions of change over the twenty-year period were phrased not in terms of declining income but rather in terms of: reduced reliance on patrons, reduced dependence on low-paid jobs, improved mobility and improved assets. Even though these farmers had become poorer in monetary terms, they considered that their quality of life had improved.

Jodha then uses qualitative analysis to examine why, because of social changes in their villages, poor people felt that they were better off, the main reasons being because they had greater independence, more mobility and were no longer at the mercy of the village elite. Jodha's is one of the best studies to show how quantitative and qualitative indicators can cross-validate each other and why there might be differences between the two kinds of indicators.



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The Blueprint Model requires significant study, analysis and planning before approval, and will for the most part involve projects related to infrastructure, institutional strengthening and human resource development.

The Iterative Model also requires significant study, analysis and planning, although the level will be less than the Blueprint Model. It follows a philosophy of learning by doing; objectives may be set for the short term, but these are challenged by a strong management review process which shapes longer term objectives and activities. This allows for lessons learned to be incorporated into project design.

It is likely that objectives in the Blueprint Model will be closer to Type 1 objectives, and objectives in the iterative model will be closer to Type 2 objectives. In the case of the Iterative Model, objectives may change over time, but at some point in the project cycle final objectives will be set, and then indicators can be developed for them.

The following Table gives examples of objectives, indicators and models.

Model	Objective	Indicator	Example of objective
Blueprint	Type 1	Relatively straightforward	Raising literacy by 50% in 'x' region over 5 years
Iterative	Type 2	More complex	Increasing poor people's decision-making by 50% in 'x' region over 5 years

3.4 TYPES OF INDICATORS - RISK, INPUT, PROCESS, OUTPUT AND OUTCOME

The rationale behind indicator use is to feel the pulse of a project as it moves towards meetings its objectives. To do so, every significant part of the project cycle should be covered by appropriate indicators. Types of indicators have been conceptualized in different ways, and after reviewing several systems of indicator organization in donor and academic documents, this Guide recommends flexible use of the typology set out below, which is the most common indicator typology found. In this typology, it is useful to think of using indicators in a chain, starting from input through to outcome. A short definition is given for each type, followed by a more detailed discussion and example⁵.

⁵ See Annex I for more detailed definitions. The example is adapted from Carvalho and White (1994).



Definitions of indicators	
Risk/enabling:	measure the influence of external factors on the project of program
Input:	concern resources devoted to the project or program
Process:	measure delivery activities of the resources devoted to a program or project. They monitor achievement during implementation, serving primarily to track progress towards the intended results.
Output:	identify intermediate results, for example at a point when donor involvement is close to complete.
Outcome:	relate directly to the longer-term results of the project, and after donor involvement is complete.
Numbers of indicators can be quite small, and a rule of thumb is that up to six indicators should be chosen for each of the above types.	

3.4.1 Risk/Enabling Indicators

Experience shows that at all stages of its cycle a project may be affected by a variety of risks or enabling features. So by risk/enabling indicators we mean those factors external to a project that contribute to the project's success or failure.

Risk/enabling indicators include socio-economic and environmental factors, as well as the operation and functioning of institutions, the legal system, and socio-cultural practices. For example, in an income-generating project indicators of risk would be the attitude of local institutions or the local elite, or the potential for marketing of goods produced. **Like all indicators, they should be developed with stakeholder participation, as end-users in particular are likely to know most about potential project risks/enabling factors.**

It would be worthwhile to explore the possibilities of scoring risk/enabling factors at the project level to isolate CIDA's responsibility for success. For example, risk and enabling factors could be scored on a scale of 1-5. In an income generating project in a particular region, a major political or environmental disruption in that region that negated the effects of the project could be scored '5'. Less devastating disruptions, for example floods that made a road impassable for three months, could be scored '1' or '2'. Some experimentation would be needed at the project level before it was possible to see if such a system is feasible.



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Related questions are to determine which results in the project area are caused by factors outside of the project's control, and what the effects of the project are on the area outside the project. For example, how can the intervention of another donor in a similar sector to the one in which CIDA is working be factored in to evaluation. This short Handbook cannot deal with these important questions, and the reader should turn to specialist advice related to them which can be found in Bamberger and Valadez (1994).

3.4.2 Input indicators

Also called "resource" indicators, they relate to the resources devoted to the project or program, for example funding, human and non-human resources, infrastructure, institution-building, and other means by which a program or project is put into effect. They play an important role in flagging potential problems and identifying their causes, but input indicators alone will not reveal whether or not the project or program will be a success.

In an education project, input indicators might include: credit disbursed; materials purchased or adapted; views of the community as to the feasibility of the project; or trainees identified.

When project funding begins and input indicators are used it is also crucial to collect base-line data from which results can be measured. An example of base-line data in an education project might be literacy and enrolment rates, disaggregated by sex, ethnic and socio-economic grouping.

3.4.3 Process indicators

Also called "throughput" or "activity" indicators, they reflect delivery of resources devoted to a program or project on an on-going basis. As such, they are the best indicators of implementation and are used for project monitoring. However, while they reflect achievement of results, they should not displace measures of distal outcomes. A process may be successful at the same time as the outcome is a failure, as noted in this piece of wry folk wisdom, "the operation was a success, but the patient died," or, "the schools were built on time, teachers were hired, parent involvement was high, as were enrolment and graduation rates. But the graduates were unemployable because they lacked relevant skills."

Some projects, for example projects with an empowerment focus or projects which concentrate on capacity development and institutional strengthening, will rely more on process indicators, because they involve long-term change over many years. But even in these projects the focus for evaluation once donor funding is complete should be on outcome.

In an education project, process indicators include: views of the community as to facilities being built; number of facilities in operating condition; enrolment rates of girls and boys; or amount of stipend disbursements.

3.4.4 Output indicators

Output indicators are often used in project evaluations, but are less useful than outcome indicators as they do not track distal results. This is because output indicators measure intermediate results concerning products and services that are delivered when a program or project is completed, but not longer-term results.

One of the most important tasks in use of indicators is to carry out evaluation at the outcome as well as the output level.

In an education project output indicators might include: number of girls trained; opinions of teachers on training facilities provided; or number of facilities in operating condition.

3.4.5 Outcome indicators

Outcome indicators concern the effectiveness, often long-term, of a program or project as judged by the measurable change achieved in improving the quality of life of beneficiaries. They are also known as "impact" indicators.

In most cases, the primary emphasis in using indicators should be on outcome, because this best measures distal results.

Examples of outcome indicators in an education project are: views of parents on the benefits of schooling; number of girls and boys employed from project schools; type of employment; or impact of employment on women's empowerment.

Many program and project evaluations use input or process indicators rather than outcome indicators. Reasons for this include lack of resources devoted to evaluation and a lack of institutional capacity for evaluation. Use of outcome indicators will often involve long-term tracking of participants and in-depth qualitative analysis. But these should not be regarded as strong arguments against using outcome indicators.

The cost of using outcome indicators will not normally be prohibitive, and will be repaid at a later date if the intensive lessons learned from the use of these indicators can be applied in other programs or projects.

As is apparent in the examples given above, indicator types are sometimes difficult to separate, in particular process and output indicators. A number of other indicator chains are also available for use. For example, CIDA's Performance Review Division (CIDA 1995b) has suggested using a similar four part chain to the one recommended here, based on the Logical Framework Analysis and its terminology of "input, output, outcome and impact". In practice it is clear that the label, e.g. process or output, attached to indicators is less important than a clear understanding of what the indicator is measuring. The other key point to remember is that indicators should cover all stages of monitoring and evaluation, through the project cycle.



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3.4.6 Indicators, time-frames and sustainability

Time-frames related to indicators should be as clear as is feasible. Setting clear time-frames will be easier in projects with Type 1 objectives, as these objectives set out clear project features to be accomplished. This task will be more difficult with more iterative projects with Type 2 objectives, where objectives and subsequently time-frames may change as the project progresses. But even in projects with Type 2 objectives, a final set of objectives should be formulated at some stage during the project cycle, after which approximate time-frames can be set.

A related question is which indicators to use at which stage of the project cycle. Ideally, input indicators should be used at or close to the start of the project, at which point base-line data is collected. Process indicators should be used while the project is proceeding, for purposes of monitoring, and until near the end of donor involvement. Output indicators should be used near to the end of donor involvement, and outcome indicators should be used after donor involvement is complete. Process, output and outcome indicators can then be compared against each other and against base-line data in order to determine how far objectives have been met. In some cases, the same indicator will be used to measure process, output and outcome (e.g. disaggregated enrolment figures, literacy rates or the local community's level of satisfaction with the project), the difference coming in that indicators are used at different points in time.

A rule of thumb is that outcome should be determined three to five years after donor funding has ended, using outcome indicators. Waiting for three to five years after donor funding has ended will allow an assessment of whether or not the project is likely to achieve *sustainable* results. In the case of larger, more complex projects, it may also be necessary to revisit the project area more than five years after funding has ended in order to assess sustainability. But remember that indicator use over time cannot always be organised in such a clear way because projects often do not have clear beginnings and ends.

3.5. CRITERIA FOR THE SELECTION OF INDICATORS

There is obviously no such thing as a set of universal indicators. Users must design and adapt indicators for their own purposes. The most important criteria to bear in mind are:

Criteria for the selection of indicators

- Indicators should be developed in a participatory fashion, including all stakeholders wherever possible.
- Indicators must be relevant to the needs of the user, and at a level that the user can understand.
- All indicators should be sex-disaggregated.
- Both qualitative and quantitative indicators should be used.
- Indicators should be easy to use and understand.
- Indicators must be clearly defined.
- The number chosen should be small. A rule of thumb is that up to six indicators can be chosen for each type of indicator (input - outcome).
- Indicators should be technically sound.
- Indicators should measure trends over time.
- The ultimate focus should be on outcome indicators.

More detailed information on each of the points listed above is given in Annex 2.



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5.1.1. The need for ensuring participation

Ideally all project level indicators should be developed in close co-ordination with project stakeholders, including intended beneficiaries.

Agency literature, including CIDA policy documents, increasingly points to the need for the participatory development of indicators. In practice this is rarely done in a systematic way, partly because of cost and time constraints, partly because of a mistrust of stakeholders, and partly because of a lack of methodological knowledge as to how to formulate indicators in a participatory fashion. However, **developing indicators in a participatory fashion need not be expensive or complex, and in the long term should lead to more efficient and effective projects that relate closely to the needs of local communities and reflect their priorities, and therefore to sustainable development.**

Annex 4 gives details of current methods of participatory evaluation and the potential for developing indicators from this work. A review of experience and the potential for the use of participatory methods in CIDA is given in CIDA (1994).

As work on indicators within CIDA continues, there is an opportunity for CIDA staff to collect, analyse and learn from material from past and on-going projects that have included the participatory formation of gender-sensitive indicators. As participation has been a key element in development projects for several years, there is already extensive knowledge among CIDA staff and CEAs related to participatory development of indicators, but this knowledge may be unrecorded, named in project documents as something other than "indicators," or uncollected.

5.2 . INDICATORS IN THE EDUCATION SECTOR

The following is an example of indicator use in a generic gender integrated education project.

EXAMPLE: an education project

Background

Consider a region in which agriculture is the principal source of livelihood, supplemented by home-based activities such as weaving and sewing, carried out mainly by women. Women's main production activities include growing vegetables, hoeing, weeding, harvesting, threshing, and small-animal husbandry (e.g. poultry, milking). Because of poverty, socio-economic inequality and lack of gender-equity in the region, there is a bias in the local educational system towards the education of boys from wealthier households.



All primary and secondary education is provided in village-based public schools, and teachers are mainly educated local people, with 75% of the teachers being men. The number of teachers is insufficient for the potential number of students. Although the law requires compulsory primary schooling from age 6 to 13 years, there is only sporadic enforcement of this.

Enrolment rates show substantial differences across different socio-economic groupings and between women and men. Gender bias is found in the enrolment rate at the primary level (grades 1-6): 50% for girls compared to 80% for boys. Bias towards wealthier socio-economic groups is also found in the enrolment rate at primary level. When socio-economic groups are classified from 1 to 5 dependent on total income, group 1 (wealthiest) displays 90% enrolment rate and group 5, 15%.

Project objective

Objective	Type of Objective
To ensure socio-economic and gender equality in access to primary education, - without reducing enrolment rates - within five years.	Type 1

Project components

1. *A system of incentives aimed at parents and teachers. Parents from poorer socio-economic groupings will be given monthly in-kind or cash payments if their children satisfy pre-determined enrolment and attendance rates. Parents from all socio-economic groupings will be given monthly in-kind or cash payments if their daughters satisfy pre-determined enrolment and attendance rates. The second part of this component attempts to ensure "buy-in" from households from all socio-economic groups.*
2. *To maximize community involvement village-based advisory schooling councils (ASCs) with equal representation of male and female parents and teachers, and equal representation from across socio-economic groups, will be formed. The size of the payments to parents will be determined in consultation with the ASC, which is also responsible and accountable for their distribution. This component attempts to facilitate community participation and ensure on-going community involvement and therefore sustainability.*
3. *Improvements in quality of school equipment: mid-day meals, and classroom equipment, such as desks, blackboards, and textbooks.*
4. *Improvements in the gender content of the curriculum.*



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Base-line data should be collected on the number of students admitted by socio-economic grouping, sex, grade, age; public expenditure per student, e.g. teachers' salaries, meals, instructional material, equipment, etc.; number of teachers and school administrators, by sex; state of school equipment, e.g. textbook-student ratio; nature of the curriculum, e.g. time devoted to different subjects.

After collection of base-line data, the following are quantitative and qualitative indicators that can be used to measure the results of this project, using the risk and input-to-outcome typology. For further discussion of education, health, employment and water supply indicators, see Annexes 5 to 9 in the Guide.

EXAMPLE

Risk/enabling indicators

- *Government support gauged by analysis of official attitudes.*
- *Popular community support gauged by attendance and analysis of comments at meetings.*
- *Elite support, gauged by focus group meetings and comments at meetings and interviews.*

Input indicators

- *Amount of project funding.*
- *Community perceptions of the feasibility of the project.*
- *Degree of community input to project planning, by socio-economic grouping and sex.*

Process indicators

- *Receipt of cash or in-kind payments by socio-economic grouping of household.*
- *Regular monthly meetings of ASCs.*
- *Equal participation across socio-economic groups and by women and men in ASCs.*
- *Parental views of benefits of schooling.*
- *Net and gross enrolment rates by socio-economic grouping and sex.*
- *Drop-out rates by socio-economic grouping and sex.*



Output indicators

- *More equitable employment of women and men teachers.*
- *Equitable school enrolment rates by socio-economic grouping and sex at end of donor involvement.*
- *Equitable school completion rates by socio-economic grouping and sex at end of donor involvement.*
- *Equitable literacy rates by sex and across socio-economic grouping at end of primary level.*
- *Improved perceived gender content in the curriculum (e.g. improved representation of women).*

Outcome indicators

- *Equitable school enrolment rates by socio-economic grouping and sex three years after end of donor involvement.*
- *Equitable school completion rates by socio-economic grouping and sex three years after end of donor involvement.*
- *Improvements in status of boys and girls from poorer groups, in terms of health and employment.*
- *Changes in community and parental perceptions of the desirability of having children from poor households and girls educated.*

Qualitative analysis

This would involve identifying and isolating the factors that caused specific indicators to be in place and why the project succeeded or failed. For example, it would involve analysing how, why and when members of the community participated, any constraints placed on the project by wealthier socio-economic groups and how these were overcome, and showing the links between increased education and higher status.



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5.3 INDICATORS IN THE HEALTH SECTOR

PROJECT EXAMPLE 2

Background

Making sure that primary health care is available is a central task in health interventions and specially important for women and girls. As an example of how such an initiative can be evaluated, we shall consider a WID-specific health project whose principal focus is "safe motherhood," i.e., prenatal care and delivery, postpartum care, and family-planning services. The stakeholder population lives in an isolated area where child and female mortality and morbidity rates are about 50% higher than in the rest of the country. For generic health related indicators and discussion of some of the methodological issues with these indicators, see Annex 6.

Project objective

To promote women's access to essential health services, so that infant, child, and maternal mortality and morbidity rates are reduced to the national average, within five years.

Again, as in the education example, this objective can be defined as a Type 1 objective; it has clear aims that are relatively easy to measure over a set time.

Project components

- *To train, and upgrade the skills of 300 birth attendants and primary health care providers. These would be drawn mainly from women in the community, and their roles include:*
 - a) *providing advice and counselling on basic health care;*
 - b) *diagnosing reproductive-related and other health or injury problems, and prescribing limited treatment;*
 - c) *providing essential medicines and immunizations;*
 - d) *referring serious complications to regional hospitals;*
 - e) *hearing and reporting complaints about domestic violence and abuse, and;*
 - f) *collecting information and data on health in the community.*