

EVALUATION CONNECTIONS

President's message

María Bustelo, EES President

Welcome to the 8th edition of Connections, the Newsletter of the European Evaluation Society, a tool for communication among members through articles and news from our community!

Evaluation in Europe has made enormous progress and evolved greatly. It is now embedded in the governance of most national administrations as well as in the European Union. National, regional and global evaluation associations have multiplied. Evaluators in Europe and beyond are increasingly working across national borders. They are keen to contribute to the development of the evaluation discipline and to promote knowledge creation and social learning in specific sectors and on different themes.

In pursuit of these objectives and to help forge ever closer links among its members the European Evaluation Society (EES) is launching the Thematic Working Group

(TWG) initiative. A 'Gender and Evaluation' TWG has already been set up on a pilot basis and it is presenting this special issue of 'Connections' on Gender and Evaluation. As well, this TWG is sponsoring sessions in our upcoming 10th Biennial EES Conference in Helsinki during the first week of October. These sessions are marked with a distinctive logo in the Conference Programme.

The EES Board has also endorsed the creation of three new TWGs – 'Evaluation of International Engagement in Fragile states', 'Evaluation Professionalisation', and 'Sustainable Development Evaluation', which are described in this issue. The Helsinki Conference is a great platform for exploring TWG issues, goals and processes, and the stepping stone to further foster those TWGs and create others.

We sincerely hope that this extended way of collaborating will deepen and broaden the reach of our Society and help improve evaluation practice in Europe.



Editorial

María Bustelo and Liisa Horelli

We are extremely happy to present this special issue of Connections on Gender and Evaluation. It has been put together in record time, and this has only been possible because of the enthusiastic and rapid response of the authors and the collaboration of our fellow Board Members. We are also excited about the opportunity for presenting

the Thematic Working Group (TWG) on 'Gender and Evaluation' which will hold its first meeting at the 10th Biennial EES Conference in Helsinki.

This issue of Connections reveals an interesting collection of various approaches to gender and evaluation. The shared theme of its seven short articles is the contribution that gender and feminist approaches can make to evaluation theory and practice as well as to a more equal and fair society.

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Donna Podems, reflects in a challenging and stimulating way on the potential tensions between feminist and gender approaches to evaluation.

Belén Sanz and Shravanti Reddy deal with the concepts and strategies of gender-responsive evaluation that are being followed at UN Women, highlighting apparent controversies between equity and equality, which will be discussed further in a special panel of the EES Conference.

The other five articles reflect on diverse topics such as the consequences of violent contexts for evaluation (Colleen Duggan), the integration of the gender perspective in urban planning (Liisa Horelli), and relate different experiences for gendering evaluation in places such as India (Katharine Hay, Ratna Sudarshan and Vanita Mukherjee), Sweden (Anne-Charlott Callerstig and Kristina Lindholm) and Italy on evaluation of the European Structural Funds (Flavia Pesce and Manuela Samek Lodovici).

We are sure that you will enjoy reading this special issue. We will have the opportunity of debating these issues in Helsinki in one of the eleven sessions related to gender or any other one, in the Gender and Evaluation TWG meeting, or in any of the programmed social events.

In case you cannot make it to Helsinki, please do not hesitate to send us your comments and ideas and stay tuned: send your request to be included as part of the Gender and Evaluation TWG to the EES Secretariat (email) and we will get back to you.

PRESENTATION OF TWG

A message from Julia Espinosa, 'Gender and Evaluation' TWG leader

Gender equality has been recognized as an international commitment and a prerequisite for development since the United Nations Fourth World Conference on Women, Beijing 1995. Since then there has been a flurry of gender equality initiatives. But their effects have been limited and they have sometimes worked at cross purposes. The disappointing results are partly explained by a flagging political commitment to gender equality policies during their implementation phase. Equally, the gender perspective has not been integrated in every relevant policy. Progress has also been hindered by the contradictory content of some policies. While labeled 'gender policies', they have unintendedly reinforced traditional gender roles and stereotypes.



In response, feminist advocates, gender-sensitive evaluators, international organizations and other national agencies and institutions have insisted on more searching analyses of gender issues in evaluation exercises. As a result, evaluation is increasingly being viewed as a key tool for accountability and learning in relation to gender equality. Moreover, gender integration has now emerged as a prerequisite for ensuring quality and effectiveness of public policies.

Given this increasing interest in gender evaluation, new evaluation practices and methodologies on gender have been developed in

recent years. At the 2010 9th EES Biennial Conference in Prague, several panels addressed the issue and many gender related papers were tabled. At the 10th EES Biennial Conference in Helsinki more than forty papers and communications related to gender equality will be presented organized in eleven different panels and sessions.

The proposed Thematic Working Group, focused on gender and evaluation, aims at improving our knowledge and skills on how to carry out evaluations from a gender perspective. It specifically seeks to connect the different individuals, institutions, organisations and companies working on this issue nowadays as well as to disseminate relevant evaluation activities, materials and opportunities.

We invite you to become a member and participate in this TWG by attending to its first meeting that will be held at the EES Conference in Helsinki on Thursday October 4th from 12:45 to 13:30 in Room 15.

A message from Claudine Voyadzis, EES Vice President

Increasing international assistance goes to fragile states. The 2011 World Development Report was dedicated to Conflict, Security and Development, emphasising cycles of repeated violence, weak governance and instability found in a rising number of countries. The ten principles for good international engagement in Fragile



States and Situations^① defined in 2007 by the OECD provided a set of guidelines. This was followed by a guidance document geared to improved evaluations of peace building and conflict prevention interventions^②. Both of these documents lay out generic guidelines that need further testing and adaptation to the diverse and complex force fields that affect development effectiveness in fragile states and conflict situations. Evaluation in conflict stricken and conflict prone countries is hindered by unique constraints associated with insecure and volatile contexts, fluidity of programme objectives and difficulty of measuring impacts. Recent evaluations of peace building and conflict prevention programmes have often ended up with mixed results. This highlights the need to develop a greater understanding of how to improve the design and implementation of M&E systems and processes in fragile states and conflict regions. To contribute to building knowledge and developing best practices through partnerships and exchange of experiences the EES proposes to launch a Thematic Working Group (TWG) on Evaluation of International Engagement in Fragile states starting with the creation of a website and the establishment of a discussion e-group.

We invite you to express your interest in participating in the launching of this TWG and becoming a member by writing to our Secretariat: secretariat@europeanevaluation.org

① <http://www.oecd.org/dac/conflictandfragility/principlesforgoodinternationalengagementinfragilestates.htm>

② <http://www.oecd.org/development/evaluationofdevelopmentprogrammes/dcdndep/39289596.pdf>

A message from Robert Picciotto, EES Board member

An occupational group cannot aspire to professionalism without public trust earned through ethical safeguards; proven capabilities; self management and credentials. This is because professionalism evokes expertise, credibility and concern for human welfare. By now evaluation has acquired distinctive characteristics as a discipline in its own right. It offers a well defined body of knowledge, a set of specialized skills and clearly delineated ethical guidelines. Evaluation associations are growing in number and influence. Many evaluation associations (including the European Evaluation Society) have validated the knowledge, experience and dispositions required to do good evaluation work.



On the other hand, evaluators remain deeply divided on issues of self regulation and autonomy that are critical ingredients of professionalism. Only Canada has taken concrete steps to implement a designation process for evaluators. The proposed Thematic Working Group on the professionalization of evaluation is designed to identify and promote the collective actions needed within Europe to professionalize evaluation by expanding the supply of high quality evaluation education and training; accelerating the harmonization of ethical, quality and competency standards; increasing the autonomy of evaluation practice and exploring the feasibility of designation and accreditation.

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A message from Andre Martinuzzi

The concept of sustainable development (SD) acquired worldwide attention following the publication of the Brundtland Report by the World Commission for Environment and Development in 1987. It defined sustainable development as “development that meets the needs of the present without compromising the ability of future genera-



tions to meet their own needs”. Since then SD has become broadly accepted as a guiding vision for policy makers, programme managers, civil society and the business sector. The financial and economic crisis (as well as growing societal concerns about climate change, loss of biodiversity and unfair production and consumption patterns) has focused public attention towards implementation and measurement of SD.

While inclusion of broad SD objectives into planning and implementation seems relatively simple, evaluation of the impacts of concrete measures on sustainability is still a challenge for researchers, evaluators and client organizations. Adoption of SD principles has profound implications for evaluation: the focus on future generations requires evaluation methods with a comparably long time horizon; the holistic principle requires sound aggregation and valuation methods to achieve a well-balanced assessment of environmental, economic and societal impacts and their trade-offs; the global perspective requires tracking of long lived and systemic effects; the principle of public participation requires evaluation methods and processes which can accommodate involvement, empowerment and learning of a wide range of stakeholders. The implications for the skill set and competencies of evaluators, as well as their ability to identify and handle moral dilemmas, are far reaching.

The proposed EES Thematic Working Group “Evaluating Sustainable Development” is designed to broaden the outreach of several national initiatives dealing with SD evaluation, to offer a platform for a continuous debate among SD evaluators from all over Europe, to stimulate a discussion on quality and competency standards for SD evaluation and to support education and training in this area. It will be co-ordinated by Dr. André Martinuzzi, Director of the Research Institute for Managing Sustainability at the Vienna University of Economics and Business. He was co-chair of the task force for environmental evaluation in the German Evaluation Society for nearly 10 years and co-ordinated the successful EASY-ECO programme (see www.easy-eco.eu).

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Liisa Horelli, PhD.

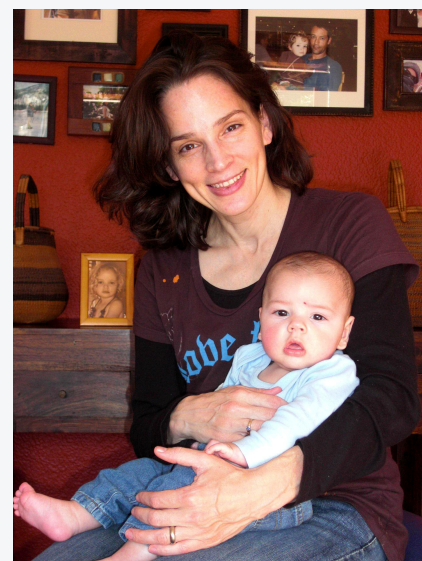
is adjunct professor at Aalto University, Helsinki. As an environmental psychologist, she has conducted action research with children, young people and women on participatory urban planning and



community development for decades. She is currently President of the Finnish Evaluation Society and Board Member of EES.

Donna Podems

has 19 years experience in evaluation, and holds a doctorate in interdisciplinary studies with a focus on program evaluation. She lives in Cape Town where she is a fellow with CREST, Stellenbosch University and also runs her own small evaluation



company, OtherWISE. She is the proud mother of Gemma and Rhys.

EVALUATION OF URBAN PLANNING FROM THE GENDER PERSPECTIVE

By Liisa Horelli, PhD, Aalto University, Helsinki

Mainstream evaluation theories and practices are mostly gender-blind, unless a gender perspective has been explicitly mandated when the evaluation has been commissioned, a rare occurrence especially in urban planning evaluations. Admittedly conducting urban planning evaluations from a gender perspective is not easy since gender concepts applicable to such contexts are ambiguous; urban planning policies and systems vary considerably from one country to another and the selection of an appropriate evaluation approach among the bewildering diversity of options on offer is far from self-evident. In order to fill the gap, I will argue that the complexity of gendering evaluations in urban planning requires an integrated assessment framework and the adoption of mixed methods in order to facilitate knowledge building and activate “learning to learn” behaviors in the urban planning field.

Building an integrative framework

The proposed evaluation framework for urban planning would comprise concepts from gender studies, urban planning and evaluation. A historical perspective to equality discloses that at least three waves can be distinguished each of which elicits a distinct evaluative strategy. All three are relevant today and should be used in parallel. First, the Equal Treatment perspective that emerged in the late 19th century is consistent with the contemporary evaluation focus on human rights. Second, the advent of the Women’s Movement from the 1960s onwards evokes an empowerment approach to evaluation. Third, the super-strategy of Gender Mainstreaming (Horelli, Booth & Gilroy, 2000) connotes a gendered approach to evaluation. Gender is not just about sexual identity. It is a psycho-corporal and socio-cultural construction of masculinities and femininities embedded in a system of power relations, reflected in a certain gender order that has to be deconstructed to reveal its instrumental significance in different contexts. This means

that gender mainstreaming can be applied from different perspectives and with various models, such as the integrative, agenda setting or transformative ones (Squires, 2005).

According to Nadin and Stead (2008), two major types of spatial planning systems exist in Europe. On the one hand, the continental, imperative type is dominant in Nordic, Germanic and Roman countries. It is based on a set of abstract rules and principles that are applied at the outset of urban planning. On the other hand, the Anglo-Saxon system is permissive and it evolves based on precedent cases. They have different foci and steering systems as well as consequences. European Union practices seek to make them converge within a broad framework of planning principles. This means that a variety of urban planning definitions co-exists, ranging from pragmatic arrangements of available physical space to the “organizing of hope” in the design of human settlements (Hillier & Healey, 2008). These diverse features add pressure to the contextual analysis of ex post gender evaluations. Currently, evaluation in urban planning mainly implies an ex-ante evaluation, such as the environmental and/or social impact assessment. In practice however, very few holistic ex ante evaluations of urban plans or their implementation and their ex-post outcomes are conducted, particularly not from a gendered perspective.

Gendered evaluations require a design characterized by iterative steps which include: the definition of the purpose and object of the evaluation, its resources, contextual analysis, applications of change and action theories, the choice of evaluation questions and criteria that can then be measured through gender-relevant indicators, the selection of methods, and the dissemination of the results (Horelli, 2009; Horelli & Wallin, 2010). Theory-driven evaluation (Chen, 2005) or contribution analyses are important in the assessment of urban planning and development, because they help to respond to important policy questions: what is sought

after (visions and expected results), why do the interventions affect the results and how to achieve the results. Besides being theory driven, gendered evaluation frequently embody different evaluation approaches, such as utilization & equity-focused, empowerment evaluation or evaluation 2.0 that applies tools from the social media, just to mention a few.

Ideally, mainstreaming evaluation of urban planning and development refers to the systematic and systemic determination of worth or merit from a gender+ perspective, which means the inclusion of interactions of gender with other inequalities.

This adds to the complexity of the evaluation process. It means more work, as one might have to first evaluate the intervention in traditional ways and next by a fundamental reconsideration of the findings from a gender perspective that intersects with age, class, ethnicity, disabilities or sexual orientation. This is worth the effort since gendered evaluations combine accountability of duty bearers with knowledge development and empowerment – a way of “learning to learn” for the society.

Problems with the choice of criteria and indicators

Emerging efforts in the gendering of evaluation can be identified even in the field of urban planning and development, e.g. the Gender Coop-process (European Community of Practice on Gender Mainstreaming). Unfortunately, the practice of producing long lists of incomparable indicators that do not cumulate knowledge but rather distort the holistic picture is still prevalent. A meta-analysis of several urban projects at the GDUS-seminar (European Network on Gender and Diversity in Urban Sustainability), in Hannover April 2012, indicated that there is a need for gender-sensitive criteria for both the participative process of urban planning and its content (Horelli 2012).

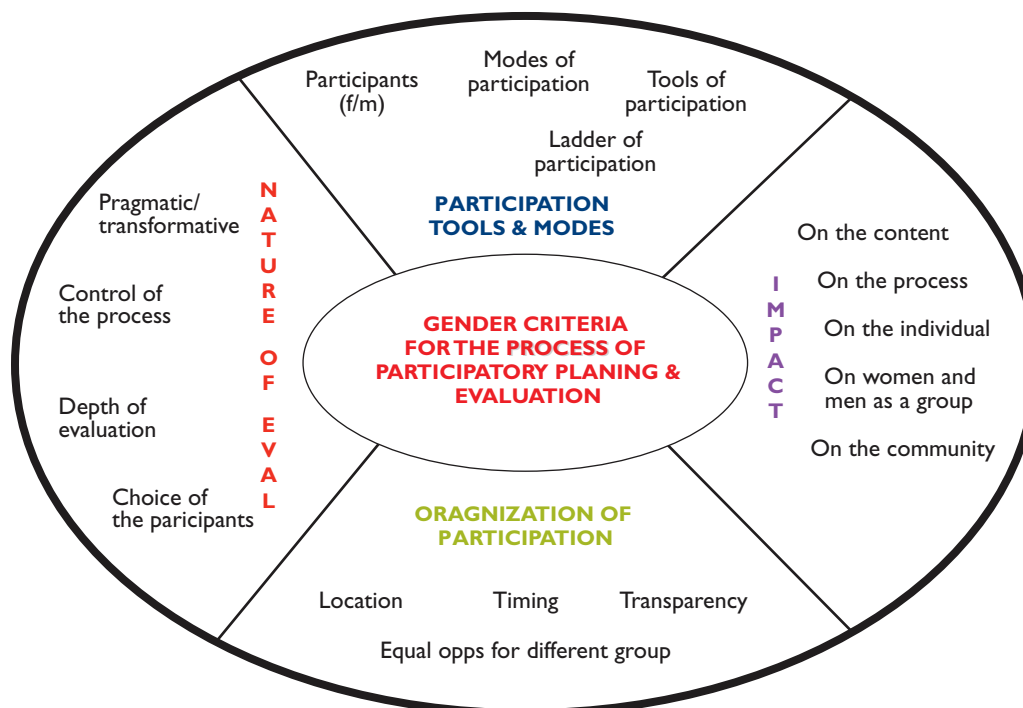


Figure 1. An example of gender-sensitive process criteria for participatory urban planning (Horelli 2012).

While the choice of process criteria (Figure 1) is relatively easy, the selection of relevant content criteria is not as contexts and purposes greatly vary. This implies identification of a few core planning issues, such as reproduction/production, mobility, private-public spheres and nature that interact with a set of cross-cutting criteria which produce indicators of the urban planning content.

Conclusions

The problem with current thinking of gendered evaluations is that they tend to rely only on gender concepts and to ignore the vast amount of possibilities provided by different types of evaluation approaches. An integrative evaluation framework is needed to open up the complex context of urban planning and development. Lifeless statistics concerning men and women and the resources they command are not sufficient. The deconstruction of the mechanisms of change requires the use of theoretical concepts, e.g. gender+ and others. Last but not least, participatory visioning with creative methods enhances the choice of more pertinent gendered objectives and criteria that can then be measured by gender-sensitive indicators that suit the context and the purpose of evaluation.

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FEMINIST EVALUATION AND GENDER APPROACHES: AN INTRODUCTION TO EXPLORING THE DIFFERENCES

By Donna Podems, Research Fellow, CREST, Stellenbosch University, South Africa

Programs that aim to change the lives of women, the disempowered, and the 'poorest of the poor' are implemented in developed and developing countries all over the world. Attached to these programs are often program evaluations that intend to improve, judge, or create knowledge. These situations are often complicated, and in many instances complex, and more often than not a combination of the two in conflicted and uncertain operating environments. Designing an appropriate evaluation that will provide empirical information in a volatile, multifaceted political, social, and cultural environment, in a timely fashion and within budget, is challenging at best. Feminist evaluation and gender approaches offer distinct approaches that may be considered as equally valid options depending on the context. This article briefly introduces the differences between these two approaches that are often used interchangeably.

Clarifying concepts – Gender and Sex

Before clarifying the differences between feminist evaluation and gender approaches, it is important to clarify concepts used by both – 'gender' and 'sex'. Each time I fill out a survey that asks for my gender and provides the choice of male or female I want to use an 'other' category that is rarely offered and write, on the basis of United States of America socialization precepts, that I would define myself as 75% female and 25% male. Of course, what they are asking about (I am pretty sure) is my biological sex. Some feminist and other theorists use the terms "sex" to describe anatomical differences between females and males and "gender" to refer to the socially constructed relationships between women and men (Barrett & Phillips, 1992; Scott, 1986). In feminist evaluation and gender approaches the

word "sex" is used as an analytic category to make a distinction between males and females. There are also cogent critics of this categorization who argue that the male vs. female classification is needlessly limiting (Hood and Cessaro, 2002).

Feminist Evaluation

It's helpful to understand feminist evaluation history, its core elements, and how it is defined today. Understanding the difference between the two approaches will help an evaluator to understand how to use them separately, when to incorporate them into other approaches, and when if at all to apply them to a particular evaluand. Feminist evaluation's particular history and growth begins to untangle it from gender approaches.

Feminist evaluation grounds its roots in feminist theory and research. Part of the challenge in using feminist evaluation is defining it, particularly when feminist evaluation can be described as "fluid, dynamic, and evolving" (Seigart & Brisolara, 2002, p. 2). And unlike most gender approaches feminist evaluation does not provide a framework. Rather feminist evaluation theorists tend to describe the approach as flexible and describe it as a way of thinking about evaluation (Beardsley & Hughes Miller, 2002; Hirsch & Keller, 1990; Hughes, 2002; McRobbie, 1982).¹

In contrast to feminist evaluation, gender approaches have a separate history, their own core beliefs and they often privilege a specific implementation approach. In the 1950s and 1960s, interventions designed for women in the developing world were based on a human rights context, and often took a welfare approach (e.g., providing handouts and services, such as clothes and family planning). The ap-

proach did not challenge women's status or the prevailing patriarchal structures, and therefore, as Moser (1993) suggests, this approach was fashionable well into the 1990s. I would argue that gender approaches are still fashionable in 2011 as a rapid review conducted over several months late in 2010 sampled more than 25 international multilateral and bilateral North American and European donor websites and identified multiple projects using a gender evaluation approach.

The 1970s brought recognition that women were important as contributors to economic development, particularly through activities traditionally managed by women in developing country contexts, e.g. agriculture and nutrition. Boserup's *Women's Role in Economic Development* (1970) encouraged donor organizations to recognize women as an integral part of any intervention² aimed at changing important aspects of people's lives. In 1985, the United Nations made this formal recognition (Pietilä & Vickers, 1990; Tinker, 1990).

Specifically the 1970's brought three main gender approaches to program design, and in a certain way new approaches to evaluation. The following progression reflected increasingly ambitious aims in pursuit of improved human well-being and positive changes in women's lives: (1) women in development (WID), (2) women and development (WAD), and (3) gender and development (GAD). Each approach focuses on women as an analytical and operational research category. Each was developed by and with the sponsorship of western donors.

Feminist evaluation and gender approaches offer different ways of exploring interventions and attempting to answer their related evaluation questions. I find that I often draw on different elements of feminist evaluation and

¹ I emphasize that this section does not pretend to exhaust all feminist evaluation definitions, discussions, or explanations; rather, I provide currently accepted tenets central to feminist evaluation.

² International development interventions refer to any project, program, activity, or intervention aimed at improving or changing the social and/or economic well-being of people living in a developing world context. Examples of interventions include preventing HIV/AIDS and TB, increasing access to education for girls, or providing access to water to underprivileged people)

gender approaches to strengthen an overall evaluation design whenever I conduct an evaluation that involves the unique human being.

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ENGENDERING POLICY THROUGH EVALUATION: AN EXPERIMENT IN INDIA

By Katherine Hay , Ratna Sudarshan , and Vanita Mukherjee

Gender gaps and inequalities are a feature of almost every society. Certainly that is the case in India where we reside. The persistence of inequities demands examining what works in shifting gender norms and changing gender outcomes, and using that evidence to make change. Evaluation provides one opportunity for doing this.

However, despite gender and other inequities affecting the outcomes of arguably every program in place in India, they often are invisible in policy and planning documents. Writing in a recent issue of the *Indian Journal of Gender Studies*, Hay, Sudarshan and Mendez note:

“A challenge to understanding what works in reducing the gender gap is that gendered norms affect all aspects of work and life, which has led to gender to become widely viewed as a cross cutting issue. As such, gender is often perceived as secondary, is constantly overshadowed by other program components and has often become invisible in policy and planning documents..The reluctance to make gender concerns more explicit

suggests either lack of commitment to gender equity or doubt as to whether any alternative policy or programme design would significantly alter gendered outcomes (pg. 181).”

We propose that a feminist or equity oriented lens in evaluation can help make the invisible visible, and improve policies and programs. With a group of researchers and evaluators we are experimenting with ways evaluation can be used to strengthen policies and programs. We're doing this through a project to build capacity to conduct gender equity oriented/feminist evaluation among young and mid-career social science researchers.

The project has a two-fold approach to capacity building. One strand starts from evaluation theory and considers its application in different areas. The other starts from current evaluation practice and assesses the methods used from a gender and equity lens. The intention is to build up competence in evaluation that is sensitive to issues of gender and equity, aware of context and its implications, and which seeks to make evaluation useful

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Her work includes building evaluation curriculum in universities in South Asia, supporting evaluation communities of practice, and feminist evaluation. Her work and ideas on Evaluation Field Building in South Asia were the focus of a Forum in the *American Journal of Evaluation* (2010). She was instrumental in the conceptualization and realization of the Evaluation Conclave series in South Asia (www.evaluationconclave.org) and has domain expertise in gender and social exclusion. Katherine has been researching, working, and living in South Asia for over 15 years.



both to the implementing organisation as well as the commissioner of evaluation.

Early outputs from this effort include a special volume on “Evaluating Gender and Equity” in the Indian Journal of Gender Studies (Editors Hay, Sudarshan, Mendez, 2012). The heart of the collection is in a set of reflective pieces of researchers and evaluators who have applied their experience as practitioners, researchers and evaluators to questions of women’s rights and empowerment in a range of sectors. The papers emphasise the importance of contextualised understanding, of participatory methods, of experimentation and innovation in evaluation practice and of the role of evaluation in shifting policy perspectives, program choices, and understandings of what is changing on the ground.



The project is being led by the Institute of Social Studies Trust (a Delhi based action research organisation) with support from the International Development Research Centre and the Ford Foundation. Together with our partner organizations we are exploring questions including:

- What does feminist evaluation mean in theory and in practice?
- What does a feminist lens bring to evaluation in different domains? and;
- What role could evaluation play in engineering policies and programs?

Participants have entered into the project with an existing evaluative-research/ evaluation project and through the project are acquiring tools, peer support, capacity strengthening, and the space to share learnings with others. In turn, this will strengthen the quality and type of findings available through the evaluations.

The project intends to contribute in a modest way to a new sub-field in evaluation by supporting research on experiences in using feminist and equity-oriented evaluation approaches and methods. Demonstrating that feminist approaches to evaluation yield different and useful knowledge on persistent inequities, we hope, will provide evidence for mainstreaming such approaches in evaluation

The project is also using small grants to fund research. Two small research projects have just been approved. One looks at how a government program on basic education in India is evaluated through ‘mission based approaches’ and how such approaches help or hinder understanding how progress on gender and social equity goals have been tracked (Vimala Ramachandran is lead researcher on this) The other looks more broadly at state evaluation and accountability mechanisms in India; asking, where do feminist, gender and equity criteria figure? (Yamini Atmavilas is the lead).

Finally, the project has set up a website at www.feministevaluation.org where you can find more information on joining the conversation or sharing resources.

For more information on ongoing and related work please contact any of the authors.

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Prior to joining the Foundation, she was a Regional Coordinator for South-Asia with Development Alternatives with Women for a New Era (DAWN). Her work with the women’s movement in India spans 24 years beginning grass-roots women’s organization and feminist groups. In her capacity as a Program Officer, she is moving the agenda on young people’s sexual and reproductive rights using entry points like Child and Early Marriage and Access to Services for young people.

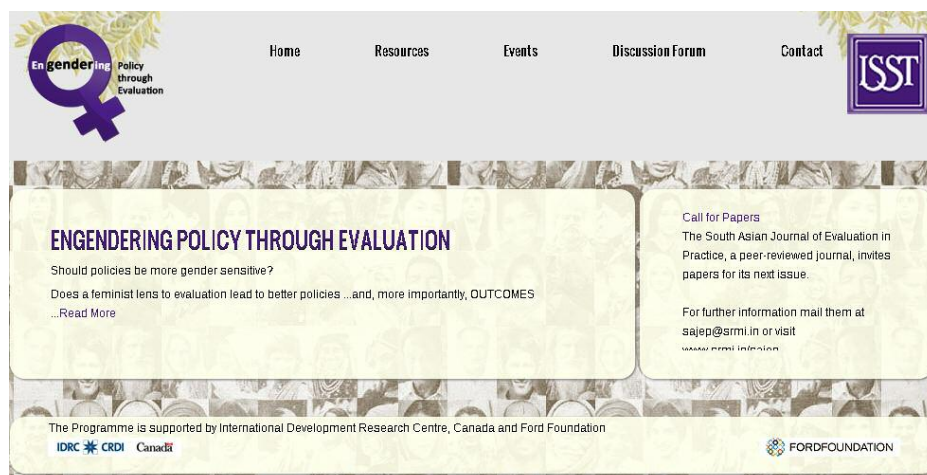


Figure 2. www.FeministEvaluation.org

EVALUATION IN EXTREMIS: CHALLENGES AND OPPORTUNITIES FOR ENGENDERING PRACTICE IN CONFLICT-AFFECTED CONTEXTS

By Colleen Duggan, Senior Program Evaluation Specialist at the International Development Research Centre (Ottawa).

Those who work in support of peacebuilding, humanitarian and development initiatives are acutely aware that conflict-affected environments are volatile, unpredictable and fast-changing. The literature and practice on gender and conflict reminds us that in these settings, women have multiple roles and diverse lived experiences. While the international media often portray women as passive victims or recipients of assistance, the reality is that violence and conflict can also open spaces for positive transformations in gender roles and relations. Conflict, we are reminded, increases risks but also precipitates shifts in decision-making processes and governance arrangements which, in the aftermath, can result in a more equitable redistribution of power and resources.

But has the evaluation community thought deeply enough about how the gendered vulnerabilities and transformative possibilities that inevitably accompany conflict affect evaluation practice? How do we make allowances for the implications that these contexts can have on advancing or retrenching gender norms and roles, which are also subject to flux within these settings?

These questions and many others lay at the heart of a three year exploratory research project whose goal has been to map out some of the most vexing challenges and promising avenues for improving evaluation practice in societies affected by violence and conflict. Supported by the International Development Research Centre (IDRC) and lead by International Conflict Research (INCORE) at the University of Ulster (Northern Ireland), the project brought together three groups who share a stake in the improvement of evaluation and research practice in conflict-affected societies: researchers, evaluators and funders. The learning that emerged from our animated exchanges will appear in *Evaluation in Extremis: Research, Impact and Politics in Violently Divided Societies*, a soon-to-be published collected volume that includes case

studies and empiric referents from Afghanistan, Nepal, India, Pakistan, Sri Lanka, Kenya, Sudan, South Africa, and Northern Ireland.

In this short article, I'd like to share three important lessons that have emerged from our collective reflection:

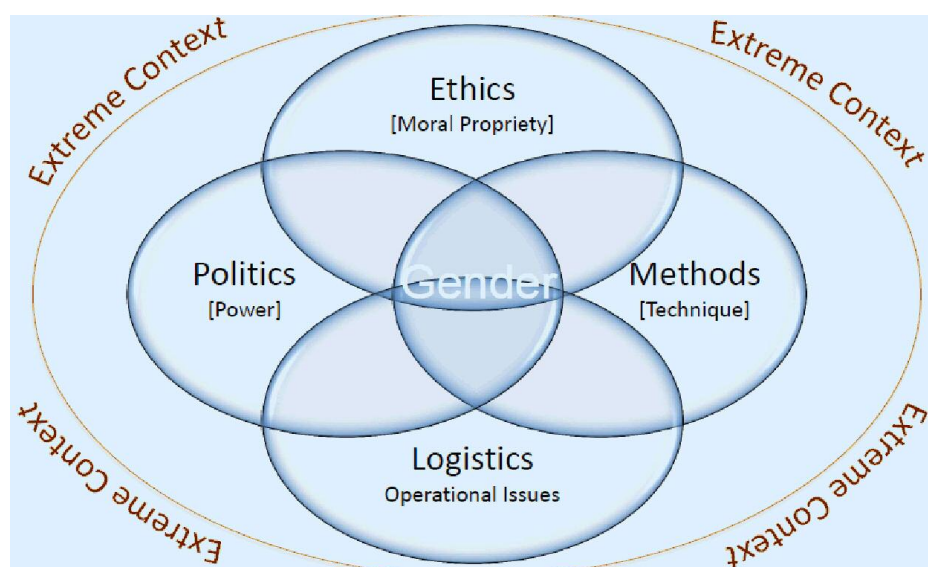
The difference that context makes: "extreme" evaluation

Our contention is that in settings affected by significant levels of militarized or non-militarized violence, context is much more than a landscape or backdrop for evaluation. Most observers would agree that the delivery of international aid in these environments intensifies the political stakes around program success and failure. The typical challenges of international development evaluation – the attribution problem, the timeline to impact lag, positive bias toward the achievement of outcomes, etc. – all become more extreme. Four areas of challenge interact: ethics, methods, logistics and power/politics (**Graph 1**). Choices around evaluation planning, conduct and use of findings are far from technocratic. They are intensely political and fuelled by changes in context. The space that evaluators, commis-

sioners and funders have to maintain or advance gender equality considerations is circumscribed by these four sets of challenges.

The conflict and gender analysis gap

Despite increasing calls to incorporate conflict sensitivity into the evaluation of peacebuilding, humanitarian and development programming, exactly how this might be done in practice remains unclear. There is a conceptual and instrumental gap between what peace and conflict practitioners call conflict analysis (and the barrage of tools and frameworks articulated to categorize conflict) and what evaluation actors understand as contextual or situational analysis. Not surprisingly, in a recent article in *New Directions of Evaluation*, Jody Fitzpatrick notes that "although different (evaluators) highlight different elements of context that are important to our practice, there continues to be a lack of unified theory or conceptualization of the potential elements in the context that influence our practice." (Fitzpatrick, NDE, September 2012). Similarly, while progress has been made in developing tools and guidelines for incorporating gender equality and human rights principles into evaluation, it is unclear how this practice should wrestle with the un-



Graph 1. The Four interacting areas of challenge

stable, dynamic and fluctuating conflict and post-conflict contexts which can nurture or undermine gender equality goals. Nuanced contextual analysis that is both gender and conflict sensitive continues to be the invisible “step 0” in the toolkit of evaluation planning execution, communication and follow-up.

**Non-maleficence (do no harm)
vs. beneficence (do some good):
a delicate balance**

The ethical dimension of evaluation and the need for more robust guidance on what constitutes ethical evaluation practice becomes more distinct and urgent in conflict affected settings. During the lifetime of our project, when discussions turned to the issue of gender and the ethical responsibilities of researchers, evaluators and commissioners, the authors involved were not always in agreement. When evaluation enters the awkward terrain of tinkering with and potentially transforming gender roles, evaluation actors are faced with hard choices. These do not fit comfortably with individual ethical positions, professional codes and contractual obligations. Researchers, evaluators and commissioners need to develop a gender-competent, “ethical compass” and understand their own lines in the sand.

We heard numerous stories of how evaluators mediated between different sets of values to shape what counts as evidence of progress towards gender equality outcomes that had often been pre-determined according to distorted and discriminatory percep-

tions of what constitutes a healthy gender status quo in a “peaceful” society. Security conditions and logistical difficulties make it difficult for evaluators and researchers to fully consult stakeholders and engage in their own brand of gender reality-testing. Well intentioned funders and commissioners and less-well intentioned local gatekeepers make accessing women and girls even more difficult.

Authors told stories of hope and woe: The evaluator of an education project in South Sudan who was being pressured to ask female respondents about potential experiences of sexual assault or rape, in light of the commissioner’s desire to fashion a new program for psycho-social support to victims of sexual violence; the evaluator in Sri Lanka who was able to convince a male commissioner that the decision of a women’s NGO to build houses in a psycho-social care project was in fact a positive unintended outcome, not least because the villagers had exercised an unprecedented show of agency and leadership – but also because in Sri Lanka a common cultural adage states that “A roof over one’s head gives peace of mind.” (Jayawickrama and Strecker, forthcoming) In these complex, dynamic scenarios, we became conscious of the importance of looking for both positive and negative unintended gender equality outcomes, often in unexpected places. We also noted numerous examples of ethical guidelines and principles for evaluators and researchers – with no equivalent standards for the commissioners and funders who deal with conflict affected settings.

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is senior Program Evaluation Specialist at the International Development Research Centre at Ottawa. Colleen has expertise in human rights and the rule of law in divided societies. She has published works on early warning and conflict prevention, gender and transitional justice, and the evaluation of peace-building initiatives.

For more information on this project, please contact Colleen Duggan (cduggan@idrc.ca) or Kenneth Bush at INCORE (K.Bush@ulster.ac.uk)

UN WOMEN’S WORK ON AND GENDER EQUALITY AND HUMAN RIGHTS RESPONSIVE EVALUATION

By Shrivanti Reddy, Belen Sanz, UN Women

The United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) was created in 2011 by the United Nations General Assembly to:

- support inter-governmental bodies, such as the Commission on the Status of Women, in their formulation of policies, global standards and norms
- help Member States to implement these standards with technical and financial support
- forge effective partnerships with civil society
- hold the UN system accountable for its own commitments on gender equality, including regular monitoring of system-wide progress

Within this mandate, UN Women supports the development of evaluation approaches that are responsive to gender equality and human rights based approaches. Evaluation is a function that both assesses the work of UN Women to advance gender equality and contributes to building a knowledge base in this area.

The UN Women Evaluation Office supports this mandate by conducting and promoting gender equality and human rights responsive evaluation to enhance accountability, inform decision-making and contribute to learning on the best ways to achieve gender equality and women's empowerment. It carries out independent corporate evaluations on thematic areas supported by the organization and organizational performance, such as women's political empowerment, ending violence against women and girls, women's economic empowerment and women's leadership in conflict prevention and peace-building. It also promotes UN coordination and accountability on gender equality and women's empowerment through the promotion of joint evaluation.

UN Women defines gender and human rights responsive evaluation as a systematic and impartial assessment that provides credible and reliable evidence-based information for understanding the extent to which an intervention has achieved or made progress (or lack thereof) towards intended and unintended results on gender equality and women's empowerment. As a process itself, evaluation is also a means to enhance gender equality and women's empowerment through the incorporation of gender and human rights dimensions in its approaches, methods, processes and use. As such, it acts as an important driver of positive change towards gender equality and women's empowerment. Furthermore the way in which the evaluation process itself is undertaken empowers the stakeholders involved.

More specifically, gender equality and human rights responsive evaluation ascertains that interventions:

- have been guided by relevant national and regional normative frameworks for gender equality and human rights, UN system-wide mandates and organizational objectives
- have analysed and addressed the structures that contribute to inequalities experienced by women and girls, especially those experiencing multiple forms of exclusion
- have maximized participation and inclusiveness (of women and other rights holders and duty bearers) in their planning, design, implementation and decision-making processes

- sought out opportunities to build sustainable results through the empowerment and capacity building of women rights holders and duty-bearers; and
- have contributed to short, medium and long objectives (or lack thereof) through an examination of results chains, processes, contextual factors and causality using gender and human rights analysis.

To this end, the UN Women Evaluation Office works in partnership with UN agencies and key national partners to develop guidelines and methodologies to mainstream gender equality and human rights perspectives and approaches in evaluation practice through integration of such key principles as participation, inclusion and fair power relations. In addition to developing a Manager's Guide to Human Rights and Gender Responsive Evaluation, UN Women is a member and current Chair of the United Nations Evaluation Group (UNEG) and also co-Chairs its Human Rights and Gender Equality Taskforce, that developed the guidance entitled "Integrating Human Rights and Gender Equality in Evaluation: Towards UNEG Guidance".

UN Women also works directly with regional and national evaluation associations such as the European Evaluation Society in order to facilitate knowledge exchange on evaluation and gender equality. A key area of work for UN Women is to serve as a repository of evaluations of gender equality and women's empowerment policies and programmes worldwide, for which partnerships are critical.

Key areas identified for further developing gender responsive methodologies include elaborating evaluation criteria drawn from gender equality and human rights principles; developing and testing innovative approaches that better elucidate the pathways to achieve the often complex, non-linear and long-term nature of achieving gender equality and women's empowerment; and exploring the methodological challenges specific for interventions that focus on gender and those where gender is mainstreamed.

For more information on UN Women's work on gender and human rights responsive evaluation, including the most recent evaluation reports, please visit:

<http://www.unwomen.org/about-us/evaluation/>.

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is currently co-Chair of the United Nations Evaluation Group's (UNEG) Taskforce on Human Rights and Gender Equality Evaluation Specialist at UN Women Evaluation Office, where she focuses on managing and conducting gender equality and human rights responsive evaluation at the corporate level.

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GENDER EQUALITY THROUGH INTERACTIVE RESEARCH AND EVALUATION: A SWEDISH CASE STUDY

By Anne-Charlott Callerstig and Kristina Lindholm

In Sweden, public sector organisations are legally required to promote gender equality. In 1994 gender mainstreaming was endorsed as the official way to achieve this objective. In this context gender mainstreaming means that the care, service and services offered to citizens should be equitable, evenly distributed and of the same quality for men and women. It also means that large investment projects should take account of the gender distribution of its intended users. But what has been the actual record?

This paper reviews the experience gained in an ongoing evaluation of a program run by the Swedish Association of Local Authorities and Regions (Lindholm ed. 2012). It reflects the results of interactive research that features a joint learning process involving researchers and practitioners (Svensson, Ellström, Brulin 2007). It aims to generate new knowledge, support organizational development and contribute to theory development. It differs from traditional action research where researchers are involved more closely in the development work (Svensson, Brulin and Jansson ed. 2009). By contrast interactive research promotes critical reflection and analysis at the interface between practitioners and researchers and stresses joint learning processes. They are encouraged to openly discuss their distinctive perspectives, to resolve potential conflicts of interests and to examine their power relations. This participatory approach to gender mainstreaming evaluation is uncommon and very promising (Bustelo 2003).

Evaluation of gender equality has much in common with formative evaluations focused on organisational development. But it has its own special features since it is concerned with sensitive issues of identity, social norms and power relations (Wahl et al. 2001). There is widespread misunderstanding and lack of awareness about gender equality issues. Furthermore, gender equality is seldom defined

– or it is defined in different ways by different actors. Gender equality is often neglected by management. It is hampered by lack of resources and it relies largely on the enthusiasm of gender equality advocates. Finally, most publicly financed and supported development initiatives are in the form of projects focused on short-term results with limited attention to sustainability, long term impact or organizational learning.

How then should organisational processes and practices in public organisations be changed to produce improvements in gender outcomes? Our conclusion is that gender mainstreaming cannot be based on simple and ready-made evaluation models. Such a complex process cannot be evaluated based on project-oriented logical and linear mindsets, management by objectives, detailed activity plans, project planning tools or results-based evaluation approaches. Such methods are too narrow and technocratic. They imply that clear-cut and optimal solutions to a problem exist and ticking items off a checklist will produce results.

Instead, gender equality work must contend with conflicts, dilemmas, resistance to change and mainstream politics (Walby 2005). It involves disclosure of power relations and interests and identification of entry points and leverage opportunities for transforming existing structures. Different ways of understanding gender must be confronted (Nentwich 2006, Hearn 2000); different approaches to change should be considered (Squires 2007, Rees 2005, Booth and Bennett 2002) and the diverse strategies and methods often used by gender mainstreaming practitioners must be taken into account (Squires 2005, Nentwich 2006, Booth and Bennett 2002). This also implies different evaluation methods (Dahlerup and Freidenwall 2005, Squires 2007). A high degree of awareness and flexibility and continuous analysis and reflection are required.

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is a PhD candidate at the Department of Gender Studies at Linköping University. She has practical experience of evaluation of gender equality and diversity work both in Sweden and within the EU. Her research is concerned with gender equality and diversity in public organisations from an public policy and administration perspective. She is also working with ongoing and learning evaluations at APel Research and Development, a National centre for Interactive and critical research in Workplace learning.



Kristina Lindholm

has a PhD in Gender Studies from Department of Thematic studies, at Linköping university. Kristina is working with ongoing and learning evaluation at APel Research and Development, which is a National Centre for Interactive and critical research in Workplace learning.



Accordingly we studied the program using different methods, including large scale surveys and case studies in various fields such as social services, education, health and rescue services. We described dilemmas we encountered and the methods we used in Gender mainstreaming in Public Sector Organisations and further developed our thoughts using case studies in three main phases: a problem orientation phase, an exploratory phase and an analysis and reflection phase (Lindholm ed. 2012, Callerstig and Lindholm 2011). We organized reflection seminars and engaged in discussions with interview respondents to create opportunities for joint analysis, learning, and critical reflection (Svensson et al 2007) and to validate our findings (Eikeland 2006). We induced participants to discuss various approaches and implications without getting stuck in solution-oriented reasoning of right and wrong and to focus on possible future strategies for development – a “playing around” approach recommended by Nentwich (2006).

We concluded that the chances to influence a change process depend on the readiness of the organization, expressed through a willingness to discuss power relations and to be open to exposure of problems and difficulties and the investment of trust, time, resources and support by management. In such circumstances learning through formative evaluation and interactive research can contribute to sustainable organizational development work. Dilemmas are a good starting point. When they are made visible through participatory evaluation they provide an excellent starting point for gender mainstreaming efforts and they offer promising opportunities for change.

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THE 10TH EES BIENNIAL CONFERENCE

3–5 OCTOBER, 2012, HELSINKI, FINLAND

Strand 1 – Evaluation governance, networks and information

Strand 2 – Evaluation research, methods and practices

Strand 3 – Evaluation ethics, capabilities and professionalism

Strand 4 – Evaluation of regional, social and development programs and policies

Strand 5 – Evaluation in government and in organizations

EVALUATION OF GENDER MAINSTREAMING IN STRUCTURAL FUNDS PROGRAMS

by Flavia Pesce and Manuela Samek Lodovici, Istituto per la Ricerca Sociale – IRS Italy^①

This note presents the methodology IRS used to evaluate from a gender perspective Structural Funds Programs (both ESF – European Social Fund and ERDF – European Regional Development Fund) from the start of the 2000–2006 programming period. The methodology was tested at local, national and European levels^② and explored the gender relevance of single Programs or set of interventions at each phase of the policy process from programming to implementation.

Phase I – Ex ante evaluation of gender potential impact

The main evaluation questions for this phase are:

- Do the Operational Programs objectives take into account the interests and specific needs of women as well the potential impact on gender equal opportunities?
- Have representatives of women's institutions and of authorities responsible for gender equal opportunities at national and regional level been involved in the programming activities?
- Did the Operational Program strategy and choice of the modes of intervention rely on a prior assessment of women's needs and potentialities?
- What are the specific potential impacts (direct and indirect) that the interventions foreseen in the programming documents might have on gender equal opportunities?
- Is attention to gender differences internalized in all the interventions of the Program?

To answer these questions, Operational Programs are analyzed and assessed according to their degree of internalization of the gender mainstreaming approach. Potential positive and/or negative impacts on men and women are estimated qualitatively ex ante.

The ex ante evaluation exercise is used at the level of every single Operational Program (national or local) in all the Structural Funds and at the level of every single measure or set of interventions contained in the Operational Programs to group them in terms of positive and negative impact on equal opportunities. This means examining the ways in which Operational Program Objectives have been deconstructed into more detailed measures.

The ex ante evaluation also focuses on the allocation of financial resources to the implementation of specific measures or sets of interventions (projected to impact positively on gender equal opportunities) to assess consistency with the program gender objectives.

This first phase of the evaluation is useful to identify policy objectives and interventions that should be improved from a gender perspective.

Phase 2 – Gender assessment of the project selection procedures and of the monitoring system

This phase analyzes the procedures each Managing Authority uses to select projects and the way they are monitored.

The main evaluation questions for this phase are:

- Is gender considered in the criteria adopted for project selection?

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^① IRS is one of the main leading private Research Institute in Italy. www.irsonline.it

^② See for example: Gender mainstreaming active inclusion policies, Synthesis Report for the EGGSI Network, September 2009 <http://ec.europa.eu/social/BlobServlet?docId=6335&langId=en>; Effectiveness of the Cohesion Policy: Gender Equality and Demographic Change. Ex-post Evaluation of the Cohesion Policy Programmes 2000–2006 (ERDF), IRS, Istituto per la Ricerca Sociale and Centre for Industrial Studies, Report prepared for DG Regio, 2009 http://ec.europa.eu/regional_policy/sources/docgener/evaluation/expost2006/wp7_en.htm.

- Are representatives of women's institutions consulted when drafting tenders in order to include specific gender criteria?
- Are gender criteria considered in the selection of all projects, i.e. not only in those involving female participants?
- Is the monitoring system able to monitor systematically and meaningfully the implementation of gender mainstreaming?
- Are gender relevant and gender sensitive indicators part of the monitoring system?
- Are all the indicators disaggregated by sex?

This second phase of the evaluation is useful to suggest specific gender criteria to be included in public tenders and to design specific *gender relevant* and *gender sensitive* indicators to be used for further monitoring of Structural Funds from a gender perspective.

Phase 3 – On-going gender evaluation

This phase evaluates from a gender perspective outputs and results obtained by the Operational Programs during its implementation.

The analysis of data collected on gender indicators is carried out both at the level of participants and at the level of specific measures or sets of interventions.

The main evaluation questions for this phase are:

- How many women relative to how many men have been directly or indirectly involved in the implemented measures and interventions? Which groups of women have been more (or less) addressed and positively affected by the measure and interventions? And which kinds of measures and interventions women are more considered as participants?
- How have those measures or sets of interventions, that were projected to have a potential positive impact on gender equality, been implemented? What are the financial resources allocated to these measures and interventions? What are their outputs and results? How to explain the results?
- Are there specific interventions that can be considered as good practices and learning examples?

This third phase of the evaluation sets clear recommendations and provides policy relevant advice on those measures or set of interventions where gender mainstreaming is weaker and gender progress is slow.

The overall evaluation process is developed within the conceptual framework of policy analysis, an approach particularly suited to understand and handle not only the complexity connected to gender equal opportunities, but also the multiplicity of actors involved in programming and implementing those policies financed by Structural Funds.

Manuela Samek

A labour economist, Manuela holds a MA in Economics from the University of Michigan (Ann Arbor, USA). She is currently Director of IRS Labour Market and Productive Activities Research Unit and she teaches Public Economics at the University of Castellanza and Labour Economics at the Catholic University of Milano. She is specialized in the monitoring and evaluation of labour market policies and programmes, socio-economic analysis, labour market trends and transitions, national and regional employment forecasts, gender mainstreaming, gender impact assessment, gender budgeting. She has a longstanding experience in evaluation activities both at national and European level and in the direction and coordination of international networks and research projects. She has published extensively on labour market trends, the evaluation of labour market and equal opportunities policies. She is in the coordination team of ENEGE – European Network of expert in gender equality, European Commission, DG Justice.



10th EES Biennial Conference

Evaluation in the networked society

October 1 – 5, 2012, Helsinki, Finland



SESSIONS ON GENDER

10TH EES BIENNIAL CONFERENCE

3rd October 2012

Hour	Session	Chair & Speaker	Room	Strand
09:30–11:00	GENDER AND EVALUATION: APPROACHES AND PRACTICE I	Chair: Liisa Horelli Donna Rae Podems (<i>Republic of S. Africa</i>), Katerina Mantouvalou (<i>United Kingdom</i>), and Julia Espinosa (<i>Spain</i>)	Room 21	3
11:15–12:45	EQUALITY AND EQUITY: IMPROVING THE EVALUATION OF SOCIAL PROGRAMMES	Chair: Belen Sanz Srilatha Batliwala (<i>AWID</i>), Emma Rotondo (<i>PREVAL</i>), Doha Mounir Abdelhamid (<i>MENA</i>), Shravanti Reddy (<i>UNWomen</i>), Maria Bustelo (<i>EES</i>) and Marco Segone (<i>UNICEF</i>)	Restaurant I.	3
13:30–15:00	HOLDING THE STATE TO ACCOUNT: USING EVALUATION TO CHALLENGE THE THEORIES, UNDERSTANDING AND MYTHS, UNDERPINNING POLICIES AND PROGRAMS	Chair: Belen Sanz Ratna Sudarhan (<i>India</i>), Nidhi Sadana Sabharwal (<i>India</i>) and Yamini Atmavilas (<i>India</i>)	Elissa Hall	1
15:15–16:45	THE INTERNATIONAL EVALUATION PARTNERSHIP INITIATIVE	Chair: Murray Saunders IOCE Board – Jim Rugh (<i>USA</i>), Maria Bustelo (<i>Spain</i>) and Marco Segone (<i>Switzerland</i>)	Hall A	1
17:00–18:00	AGENCY AND EVALUATIVE CULTURE: CONTRIBUTIONS OF FEMINIST EVALUATION	Chair: Vanita Mukherjee Shubh Sharma, Ratna Sudarshan, Renu Khanna, Anagha Pradhan, Nilangi Sardeshpande, Ethel Ninoska Mendez Castillo and Yamini Nagaraja Atmavilas (<i>All from India</i>)	Restaurant I	2

4th October 2012

Hour	Session	Chair & Speaker	Room	Strand
09:30–11:00	GENDER AND EVALUATION: APPROACHES AND PRACTICE II	Chair: Julia Espinosa Benjamin Kachero (<i>Uganda</i>), Traoré Issaka Herman (<i>Burkina Faso</i>), Chona Rebusora Echavez (<i>Afghanistan</i>) and Priya Nanda (<i>India</i>)	Room 23 + 24	3
11:15–12:45	EVALUATION FOR EQUITABLE DEVELOPMENT	Chair: Marco Segone Belen Sanz (<i>USA</i>), Hans Lundgren (<i>Sweden</i>), Maria Bustelo (<i>Spain</i>) and Nick York (<i>United Kingdom</i>)	Helsinki Hall	3
12:45–13:30 Lunch time	'GENDER AND EVALUATION' TWG MEETING	Chair: Maria Bustelo All interested people are cordially invited to join	Room 15(*)	All
14:00–15:30	EVALUATION AND GENDER MAINSTREAMING	Chair: Ivory Yong-Protzel Anne-Charlott Callerstig (<i>Sweden</i>), Priya Alvarez (<i>Spain</i>) and Paulo J. Teixeira (<i>Portugal</i>)	Room 23 + 24	3
17:30–19:00	GENDER SENSITIVE POLICIES, HUMAN RIGHTS AND DEVELOPMENT EVALUATION	Chair: Laurent Fontaine Olubukola Oyinloye (<i>Senegal</i>), Juan Andres Ligerio (<i>Spain</i>) and Florence Etta (<i>Nigeria</i>)	Room 25 +26	3

5th October 2012

Hour	Session	Chair & Speaker	Room	Strand
9:30–11:00	EVALUATING 'EMPOWERMENT': INTEGRATING THEORIES OF CHANGE, THEORETICAL FRAMEWORKS AND M&E	Chair: Zenda Ofir Melody Mentz (<i>Republic of South Africa</i>), Dorothy Mukhebi (<i>Kenya</i>), Valerie Mukuna (<i>Kenya</i>) and Marco Noordeloos (<i>Kenya</i>)	Restaurant I	3
11:15–12:45	REFRAMING THE DEBATE: WHAT IS ETHICAL PRACTICE IN INTERNATIONAL DEVELOPMENT EVALUATION	Chair: Colleen Duggan Sonal Zaveri (<i>India</i>)	Elissa Hall	3

(*) Lunch will be provided in the meeting room