



CanWaCH

Building Capacity and Confidence in
Gender Transformative Programming
A Virtual Learning Experience

Module 3 – Facilitator's Guide

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Session 12: Gender Based Analysis

Learning Objective Participants will have a stronger understanding of the foundational components of gender analysis and confidence to approach the planning and design of a gender analysis.

- Key Messages**
- Gender analysis provides essential information to inform gender transformative programming and implementation
 - Gender analysis design can build on existing frameworks and should be tailored to the needs of your initiative
 - Gender analysis should happen throughout the project cycle
 - Gender analysis can be conducted by any organization

Facilitator's Notes

Duration 75 minutes

- Activities**
- Introduction: 15 minutes
 - Activity: 20 minutes
 - Plenary/Discussion: 40 minutes

- Resources**
- Participant Resource Package
 - PowerPoint

- Technology**
- PowerPoint presentation
 - Zoom
 - Mural

Process

#	Facilitator Steps	Technology Support
1	<p>Begin the session by introducing the concept of gender-based analysis and its importance to gender transformative programming work: Gender analysis is a systematic way to identify key issues contributing to gender inequalities so that they can be effectively addressed.¹</p> <p><i>Explain</i> that in this session, you will briefly discuss:</p> <ul style="list-style-type: none"> • What do we analyze in a gender analysis? • How do we conduct a gender analysis? • When do we conduct a gender analysis? • Who conducts a gender analysis? 	<ul style="list-style-type: none"> • Start the PowerPoint and share the screen. • Progress through the accompanying slide(s). • Follow the cues from the Facilitator when to switch slides.
2	<p>Continue the discussion with participants:</p> <ul style="list-style-type: none"> • What data do you collect? • What do we analyze? <p><i>Explain to participants:</i> A gender analysis uses a gender lens to answer the following questions:</p> <ul style="list-style-type: none"> • Who does what? • Roles, responsibilities, expectations... why? • Who has what? Resources, opportunities, power.... why? • Who decides what? In the household...community... government... why? • Who gains? • Who loses? 	<ul style="list-style-type: none"> • Progress through accompanying slide(s). • Consider integrating the MURAL snapshots of groups' problem trees to this session's PPT (this will demonstrate and draw out some of the gender analysis they've already done)

¹ <https://cfc-swc.gc.ca/gba-ac/index-en.html>

Ask participants whether they have ever conducted a gender analysis and give them a chance to share their experience.

For those who have not – ask them to recall our problem analysis session in Module 2 (which was a gender analysis to an extent!). For a real gender analysis, you would gather primary and secondary data on which to base your critical analysis.

Explain to participants. it is useful to use a framework for your gender analysis. The framework you use will ask those questions above in a way that is most useful to your project or initiative, and most relevant to the population you're working with.

3 *Explain to participants:* All **gender analysis frameworks** have different domains of inquiry, but ultimately, the goal is to understand the reality and gender dynamics of the target group – it is a *situation analysis* that is focused on the examination of the role of gender in particular.

Gender Analysis Frameworks provide step-by-step methodologies for conducting gender analysis. A thorough gender analysis should reflect the ways in which all other cross-cutting issues (age, environment, ethnicity, rights) also impact on women, men and gender diverse people. (reference to annex and associated links).

See **Annex 12a** for **Historical Gender Analysis Frameworks**.

- Progress through accompanying slide(s)

4 Common domains you will often see used by various organizations and institutions pull from all of these frameworks, and might include:

- a. Roles & responsibilities
- b. Social norms/gender norms
- c. Participation and decision making
- d. Access to/control over resources
- e. Systemic/institutional norms

- Progress through accompanying slide(s)

Historically, a lot of these frameworks didn't look at intersectionality effectively. Which is where Global Affairs Canada's Gender-Based Analysis Plus (GBA+) comes in. Global Affairs Canada defines Gender-based analysis (GBA+) as an analytical process used to assess how diverse groups of women, men and non-binary people may experience policies, programs and initiatives.⁶ The "plus" in GBA+ acknowledges that GBA+ goes beyond biological (sex) and socio-cultural (gender) differences. GBA+ considers many identity factors, such as race, ethnicity, religion, age, and mental or physical disability.⁷ Recall our discussion in [Session 4](#) on intersectionality.


For more information on GBA+, including videos and examples, visit: (<https://cfc-swc.gc.ca/gba-acs/index-en.html>)

Activity 1: Gender Analysis

5 *Ask participants* to go back to their problem analysis from Module 1 and discuss:

- Do the problems identified in their problem analysis fit into these domains?
- Can they see how this framework for analysis would help identify different areas of inequality? And how it can help in turn, to inform programmatic responses?

Participants are to take **20 minutes** to connect with their problem analysis groups to discuss the above questions. Guide participants to Activity 16.1 in their **Participant Resource Package** where they will find their group members, the link to their Mural problem analysis and the discussion questions.

 **Note:** if you feel that your participants are getting fatigued with break-away groups, you can also select ONE of the problem trees that you feel reflects a good diversity of domains and use that problem tree to have the discussion in plenary.

- Progress through accompanying slides(s)
- For the group discussion, send participants to their pre-assigned break-out rooms in Zoom
- Provide the MURAL link to their problem analysis in each break-out room

6 The “**how**” of gender analysis:

Unlike in our problem analysis in Module 2, in an actual gender analysis or assessment, you would collect primary and/or secondary data to build your analysis. The actual design of your initial analysis will depend on the initiative being designed, your organization’s capacity and budget.

Defining your framework	Your organization might already have an established gender equality framework that aligns with its work and priorities. Or you might develop an analysis framework specifically for each project. The resources in Annex 12c can help provide some examples, in addition to the ones discussed above, for different approaches to the selection of specific domains.
Desktop and secondary research	A gender-based analysis should begin with desktop research, using secondary data. This can include policy analysis, regional/national health statistics or education statistics, research and reports from other organizations, multilateral institutions, etc.
Design of primary data collection tools	Gender analysis questions should always be integrated into baseline design, both to address gender equality outcomes, but also provide contextual insights at various data collection points. It is important to measure gender inequalities and transformative change through a mix of quantitative (Surveys, statistics) and qualitative tools (FGDs, KIIs, observational tools).

- Progress through accompanying slide(s)

Data collection

It is extremely important to take a gender-responsive approach to data collection by critically thinking about who collects the data (knowledge, attitude, sex, age), and when and where the data is collected, who is present during the data collection, and of course, who is the target for data collection (how are respondents selected? What considerations are important?)

Analysis

Analysis should examine the root causes of inequality relevant to the initiative in a way that can inform both the design and implementation of the initiative. Analysis should be as participatory as possible, and should involve the analysis and validation of women and girls themselves. This is often possible to different extents when conducting gender analysis throughout the project cycle.

7

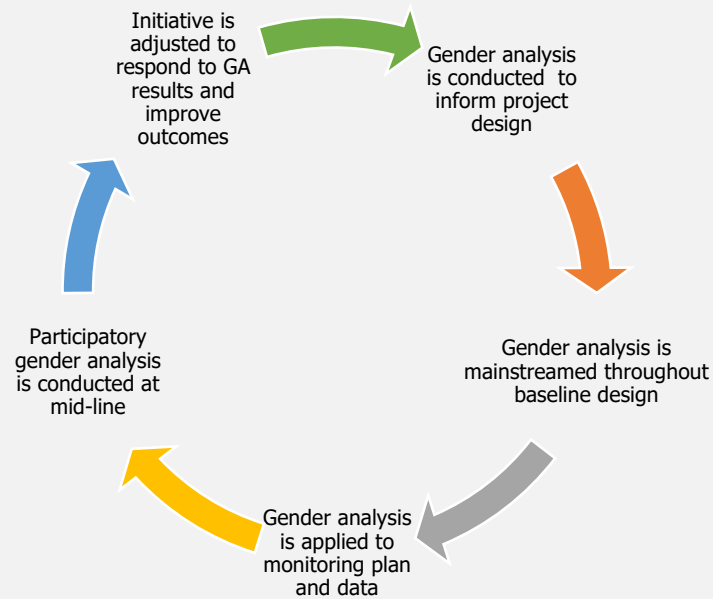
The “**who**” of gender analysis:

It’s really important that gender analysis is not thought of as a task exclusively delivered by gender equality experts. Gender analysis is an ongoing process and should be integrated into many stages throughout the project cycle and is the responsibility of all staff.

The type of expertise required for a gender analysis depends on the scope and scale of the methodology, and the existing capacity within your organization. Your gender analysis might not involve the collection of primary data and may be smaller in scale – requiring time and effort from those already in your organization. Or your project might require a large scale, multi-country gender assessment that collects qualitative and quantitative primary data – this might require external resources and expertise.

- Progress through accompanying slide(s)

Discuss in plenary each of the following potential entry points for gender analysis in the project cycle, and ask participants to share who they think could be responsible:



8 Close the session by returning to your **key messages**:

1. Gender analysis provides essential information to inform gender transformative programming and implementation
2. Gender analysis design can build on existing frameworks and should be tailored to the needs of your initiative
3. Gender analysis should happen throughout the project cycle
4. Gender analysis can be conducted by any organization

- Progress through accompanying slide(s)

Annexes

Annex 12a: Gender Analysis Frameworks

Source: <https://www.equilo.io/gender-analysis>

There are a number of **key historical gender-analysis frameworks**. Historically these have been **evolving**. We have created this Annex 12a with key frameworks you can reference.

Historical Gender-Analysis Frameworks:	
<p>Harvard Analytical Framework</p>	<p>Objective: To demonstrate there is an economic rationale for investing in women as well as men; to map the work of women and men in the community and highlight differences.</p> <p>Strengths: Collects and organizes information about gender division of labour; distinguishes between access and control over resources.</p> <p>Limitations: Tends to oversimplify, based on tick box approach; ignores other inequalities such as race, class and ethnicity.</p>
<p>Moser Framework (Gender Planning Framework – Caroline Moser)</p>	<p>Objective: Focus on strategic gender needs and concentrate on gender inequalities and how to address these at programme and policy level.</p> <p>Strengths: Makes all work visible through the concept of triple roles; distinguishes between practical gender needs (those that relate to women’s daily life) and strategic gender needs (those that potentially transform the current situation).</p> <p>Limitations: Framework does not mention other inequalities like class, race and ethnicity; looks at separate, rather than inter-related activities of women and men; framework is static and does not examine change over time.</p>

Social Relations Framework (Naila Kabeer IDS)

Objective: Analyze gender inequalities in the distribution of resources, responsibilities and power; analyze the relationships between people, their relationships to resources and activities and how these are reworked through institutions; to emphasize the human well-being as the final goal of development.

Strengths: Conceptualizes gender as central to development thinking and not an add-on; highlights interactions between inequalities (race, class, ethnicity)
Centers analysis on institutions and highlights their political aspects.

Limitations: Since it looks at all inequalities, the focus on gender can be lost.

Women's Empowerment Framework

Objective: To achieve women's empowerment by enabling women to achieve equal control over factors of production and participate equally in the development process.

Strengths: Articulates empowerment as essential element of development; enables assessment of interventions based on grounds of empowerment; aims to change attitudes.

Limitations: Framework profiles are static and do not take account of change over time; ignores other forms of inequality.

Annex 12b: Gender Analysis Domains

Roles & responsibilities

Refers to how gender shapes the way people spend their work and leisure time and how they relate to each other in the distribution of roles within households, at work and within the community. This usually includes productive, reproductive and community labour, and can also include what people are expected NOT to do, in addition to the behaviours and activities that they *are* expected to do.

Social norms/gender norms

Gender norms are social norms defining acceptable and appropriate actions for women and men in a given group or society. They are embedded in formal and informal institutions, nested in the mind, and produced and reproduced through social interaction

Participation and decision making

Refers to the nature of and degree to which an individual exercises agency in their lives and in their community, as well as the physical and figurative decision-making spaces to which they are allowed access. This usually reflects a scale – where participation is important but the power to make or contribute to decisions (at the household and community level) is optimal.

Access to/control over resources

The role of gender in determining a person's ability or freedom to benefit from and use a variety of resources, from financial resources to public services, including access to and control over things like information, transportation, and land. Key to this is the difference between access to and control of.

Systemic/institutional norms

This refers to the policy and institutional environment that has been shaped by, and in turn contributes to, the realization of rights, prevailing gender norms, and the achievement (or absence) of gender justice and equality. This can include constitutional and legislative elements at the national level, but can also refer to the functioning of systems and institutions down to the community level as well.

Annex 12c: Gender Analysis Resources

Engendering Transformational Change: Save the Children Gender Equality Program Guidance & Toolkit. Save the Children. 2014.
https://resourcecentre.savethechildren.net/sites/default/files/documents/genderequalitytoolkit_es_20final.pdf

Ten Gender Analysis Frameworks & Tools to Aid with Health Systems Research. UK Aid. 2015.
<https://ringsgenderresearch.org/wp-content/uploads/2018/07/Ten-Gender-Analysis-Frameworks-and-Tools-to-Aid-with-HSR.pdf>

Global Affairs Canada Gender Analysis
https://www.international.gc.ca/world-monde/funding-financement/gender_analysis-analyse_comparative.aspx?lang=eng

Jhpiego Gender Analysis Toolkit for Health Systems
<https://gender.jhpiego.org/analysistoolkit/gender-analysis-framework/>

Oxfam Guide to Gender Analysis Frameworks
<https://www.ndi.org/sites/default/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>

Equilo Gender Analysis
<https://www.equilo.io/gender-analysis>

Cascape Manual on Gender Analysis Tools
https://agriprofocus.com/upload/CASCAPE_Manual_Gender_Analysis_Tools_FINAL1456840468.pdf

Session 13: MEAL: From Gender Sensitive to Gender Transformative and Feminist

Learning Objective

Participants understand that integrating and reflecting gender transformative and feminist approaches to MEAL exist on a spectrum, and can be applied to both process and outcome of MEAL activities.

Key Messages

- Gender integration in MEAL activities must be comprehensive by addressing gender considerations in both *process* and *purpose*.
- The spectrum builds on itself as it intensifies. For example, gender *transformative* monitoring activities will necessarily have the characteristics of gender *sensitive* and *responsive* monitoring activities.
- Gender sensitive is the absolute bare minimum of gender integration that can be considered as good practice.

Facilitator's Notes

- If you have MEAL expertise in the room: use it!
- Make sure to distribute that expertise evenly in group work and give every opportunity for them to draw on their own experience.

Duration

60 minutes

Activities

- Introduction (15 minutes)
- Activity 1: MEAL across the Gender Equality spectrum (40 minutes)
- Wrap-up (5 minutes)


Resources

- Participant Resource Package
- PowerPoint

Technology

- PowerPoint presentation
- Zoom
- Google Docs

Process

#	Facilitator Steps	Technology Support
1	<p><i>Ask participants</i> to recall some of the terms and concepts that were discussed on from previous sessions in module 1. In plenary, invite participants to volunteer definitions or explanations of the following terms:</p> <ul style="list-style-type: none"> • Gender Sensitive • Gender Responsive • Gender Transformative • Feminist <p>If needed, you can reference the definitions sheet used on Day 1 to remind participants of how to understand these terms.</p>	<ul style="list-style-type: none"> • Start the PowerPoint and share the screen. • Progress through the accompanying slide(s). • Follow the cues from the Facilitator when to switch slides.
2	<p><i>Explain to participants:</i> as discussed over the past few days, these terms are used to describe the extent to which gender equality is integrated and/or is the focus of programming. But it can also describe the approach to an organization or a project’s MEAL</p> <div data-bbox="283 1073 1398 1235" style="background-color: #fff9c4; padding: 10px; border-radius: 10px;"> <p> Note: if you feel that your participants are getting fatigued with break-away groups, you can also select ONE of the problem trees that you feel reflects a good diversity of domains and use that problem tree to have the discussion in plenary.</p> </div>	<ul style="list-style-type: none"> • Progress through accompanying slide(s)

3 *Ask participants* who to explain the acronym for MEAL, and some of the activities associated with each word:

- **MONITORING** is normally the systematic assessment of a programme's performance over time. It involves the ongoing collection and review of data to provide programme managers and other stakeholders with indications of progress against programme plans and towards programme objectives.²
- **EVALUATION** takes place at a particular point in time, but complements ongoing monitoring activities by providing more in depth, objective assessments of the relevance, efficiency, effectiveness, impact and sustainability of programmes. Formative evaluations are carried out during the life of the programme with a focus on improvement; summative evaluations take place towards the end of the programme and are used to judge its overall merit, worth or effectiveness.
- **ACCOUNTABILITY** mechanisms include crucial information sharing to project or organization stakeholders about the delivery of services, the use of resources, and the achievement of outcomes. This includes project donors, partners and beneficiary or participants communities. Accountability to government or donors is sometimes referred to as 'upward accountability', accountability mechanisms targeting beneficiary groups or communities is referred to 'downward accountability', and 'horizontal accountability' refers to sharing and learning activities with partners, colleagues, peer organizations and stakeholders.³
- **LEARNING** activities are deliberate efforts to use project data (qualitative/quantitative/formal/informal/observational) to reflect on and improve upon programmatic and operational approaches. This often involves specific research initiatives.

- Progress through accompanying slide(s)

² Oxfam GB: A Quick Guide to Monitoring, Evaluation, Accountability and Learning in Fragile Contexts (no date)

³ Note that some participants may rightly observe that the terms 'upward' and 'downward' accountability employ a language of hierarchy that implies an associated importance which would be interrogated and rejected by many feminist approaches.

- 4 Different MEAL activities are associated with different methodologies and approaches to implementation, or their *process*. And each MEAL activity will also have a *purpose* or *outcome*.
- Ask participants* to consider examples of process and purpose/outcome. For example, the purpose of a monitoring activity might be to determine satisfaction of adolescent girls with reproductive health services. Its process might include tool design, conducting focus group discussions, results analysis, etc.

- Progress through accompanying slide(s)

Activity 1: MEAL Across the Gender Equality Spectrum

- 5 Guide participants to Activity 13.1 their **Participant Resource Package**. Under the activity instructions, they will find which group they're assigned to. Each group is assigned one MEAL activity.
- Participants will find a Google Doc link in their **Participant Resource Package**. They will find a table (similar to the one shown on the PowerPoint screen), with the top row (monitoring) filled out already.
- They will also find a copy of **Annex14b: Oxfam's Feminist Principles of Monitoring, Evaluation, Learning and Accountability**. This can support their discussion.
- Participants are to fill in the cells of this table with their group of what characteristics they think the different components of MEAL would have across the Gender Equality Spectrum. Take participants through the first row (monitoring) and explain the different elements – invite them to add (the bullets are not exhaustive!).
- Ask* groups to think about the process and to consider both MEAL *outcomes* and *process*. Groups will have about **20 minutes** to complete their grid.

- Progress through accompanying slide(s)
- Move participants to their pre-assigned Zoom break-out rooms (3, 1 x Evaluation; 1 x Accountability; 1 x Learning)
- Keep an eye on "raise hands" or participant groups who flag "help"
- Weave the facilitator in and out of the different groups to help guide their discussion and ensure they're on the right track
- Ensure all groups are utilizing the correct Google Doc link for their activity (consider posting the link in each group chat)

Note: During preparation for this session, ensure M&E advisors or researchers who are participating in this training are evenly distributed across the groups.

Low GE Integration

High GE Integration

	Gender Aware/Sensitive	Gender Responsive	Gender Transformative/Feminist
Monitoring			
Evaluation			
Accountability			
Learning			

6 After the **20 minutes** of group work, have the participants moved back into the plenary Zoom chat. Ask each group to choose 1 person to present and explain 2 characteristics of their MEAL area that would reflect a transformative or feminist approach.

As the facilitator, use the resource sheet ([Annex 13a](#)) to enrich their response and ensure they are reflecting a common understanding.

- Move participants from the Zoom break-out rooms to the plenary discussion
- Consider utilizing gallery view for the group discussions/presentations to allow for inter-personal relationship building

- 7 Once presentations are complete, ask participants to reflect on the following questions:
1. Notice we didn't discuss 'gender unaware' or 'gender blind'. Why do you think that is?
- *Because anything less than gender aware or sensitive is unacceptable.*
 2. What do you see as you move across the spectrum towards greater intensity of gender integration?
- *That the characteristics build on themselves.*
 3. What are some of the practical implications to consider as you move towards greater intensity of gender integration?
 4. Recall Day 2 discussion related to budget, human resources, timing – how does this apply to the MEAL activities?

- Continue with gallery view for this group discussion
- Progress through accompanying slide(s)

- 8 Close by reviewing the **key messages**:
1. Gender integration in MEAL activities must be comprehensive by addressing gender considerations in both process and purpose.
 2. The spectrum builds on itself as it intensifies. For example, gender transformative monitoring activities will necessarily have the characteristics of gender sensitive and responsive monitoring activities.
 3. Gender sensitive is the absolute bare minimum of gender integration that can be considered as good practice.

- Maintain accompanying slide(s) to close out the session

Annexes

Annex 13a: MEAL on a Gender Equality Spectrum

	Gender Aware/Sensitive	Gender Responsive	Gender Transformative/ Feminism
Monitoring	<ul style="list-style-type: none"> • Monitors female and male beneficiaries and stakeholders • Takes gender into consideration during planning and risk analysis for data collection • Captures and organizes data disaggregated by sex/age 	<ul style="list-style-type: none"> • Monitors female and male beneficiaries and stakeholders • Takes gender into consideration during planning and risk analysis for data collection • Captures and organizes data disaggregated by sex/age • Ensures meaningful participation of women and girls in monitoring activities 	<ul style="list-style-type: none"> • Monitors female and male beneficiaries and stakeholders • Takes gender into consideration during planning and risk analysis for data collection • Captures and organizes data disaggregated by sex/age • Ensures meaningful participation of women and girls in monitoring activities • Co-designs monitoring activities with women and girl participants • Ensures the use of monitoring tools that capture individual and experiential data • Uses monitoring activities that are empowering in and of themselves

<p>Evaluation</p>	<ul style="list-style-type: none"> • Takes gender into consideration during planning and risk analysis for data collection • Collects data disaggregated by sex/age • Analyzes and presents the differential results for male and female beneficiaries of different ages (where possible/relevant) 	<ul style="list-style-type: none"> • Assesses the differential results for male and female beneficiaries of different ages • Includes gender analysis of results and identifies gender-related drivers of change or lack of change • Includes analysis of intersecting factors of identity 	<ul style="list-style-type: none"> • Assesses the differential results for male and female beneficiaries of different ages • Includes gender analysis of results and identifies gender-related drivers of change or lack of change • Includes analysis of intersecting factors of identity • Uses a combination of qualitative and quantitative methods to capture objectivity and subjective experience • Evaluates the status and change of power dynamics between men and women/boys and girls (ie changes in <i>position</i>)
<p>Accountability</p>	<ul style="list-style-type: none"> • Ensures that information sharing is equally accessible for male and female stakeholders • Shares results that disaggregate by sex and age 	<ul style="list-style-type: none"> • Ensures that information sharing is equally accessible for male and female stakeholders • Shares results that disaggregate by sex and age • Communicates results to and invites input from women and girls 	<ul style="list-style-type: none"> • Ensures that information sharing is equally accessible for male and female stakeholders • Shares results that disaggregate by sex and age • Generating results in collaboration and with input specifically from women and girls

Learning			<ul style="list-style-type: none"> • Assigns equal or greater priority to 'downward' accountability activities and participation in planning, monitoring, learning
	<ul style="list-style-type: none"> • Research initiatives appropriately disaggregate data by sex and age • Learning initiatives consider gender in the design of methodology • Learning products document any findings that indicate differences between outcomes based on gender, or learnings related to implementation based on gender 	<ul style="list-style-type: none"> • Any research initiatives appropriately disaggregate data by sex and age • Learning initiatives include gender in the design of methodology • Learning products specifically include an analysis of outcomes based on gender, or learnings related to implementation based on gender • Learning results are validated by and shared with the diversity of participants or subjects 	<ul style="list-style-type: none"> • Any research initiatives appropriately disaggregate data by sex and age • Learning initiatives are co-designed with participants and include gender in the design of methodology • Learning products specifically include an analysis of outcomes based on gender, or learnings related to implementation based on gender • Learning results are identified and determined by the diversity of participants or subjects

Annex 13b: Oxfam's 2017 Discussion Paper: Applying Feminist Principles to Program Monitoring, Evaluation, Accountability and Learning

<https://oxfamilibrary.openrepository.com/bitstream/handle/10546/620318/dp-feminist-principles-meal-260717-en.pdf?sequence=4>

Oxfam's Feminist Principles of Monitoring, Evaluation, Learning and Accountability

Building on the contributions of feminist monitoring and evaluation (M&E) experts such as Srilatha Batiwala and Alex Pittman, the OI Feminist MEAL Principles are based on the understanding that discrimination based on gender identity is structural and systemic and that social justice in any context can be achieved only with change in power relations. Oxfam recognizes the autonomy and independence of partners in the work we do together, and is committed to relationships of mutual accountability. We recognize that evaluations and knowledge as political, transformative change processes are complex, and that change takes time and investment.

Thus, Oxfam MEAL should support the generation of knowledge that is meaningful, accessible and useful to those who rightly own it, and should:

Planning

- Examine gender and power relations, why they exist and how they change, and strive to produce knowledge in a way that acknowledges power;
- Be co-designed and co-managed with participants, so that participants agree on the assessment conclusions and how the evidence generated will be used;

Tools

- Use participatory tools and methods, encouraging broad participation, in particular by removing barriers to participation;
- Take a rights-based approach;
- Ensure that the process of measuring and evaluating impact and change is gender-just and rights-based;

Self-awareness and attitudes

- Acknowledge that persons facilitating evaluative processes should be self-aware and should possess skills including, but not limited to, facilitating, listening, interviewing, and writing/recording;
- Recognize that time is needed to build trust and understanding;
- Be flexible, adaptable and responsive to context, because originally proposed results and related indicators may be revised as people and organizations respond to change;
- Recognize that change is non-linear and complex, thus requiring the tracking and capturing of negative impacts, resistance, reaction, and unexpected outcomes;
- Use both qualitative and quantitative methodologies and methods that assess contribution, rather than demand attribution;
- Support strengthening of organizational capacity for meaningful engagement in feminist MEAL;
- Ensure that different levels of accountability are emphasized and seen as valuable by, for example, using meaningful feedback mechanisms; and
- Ensure that learning is incorporated and shared throughout the MEAL process and that it contributes to future work.

Session 14: Quality Indicators for Gender Equality Outcomes

Learning Objective	Participants will understand how to construct and select quality indicators to support gender equality outcomes and gender transformative programming.
Key Messages	<ul style="list-style-type: none"> • Indicators are a signal of change, and need to effectively respond to the level of change in project outcomes; they MUST be gender sensitive as a minimum level of gender equality integration • Gender transformative change refer to changes in social behaviours and attitudes (position, not just condition), and therefore requires a combination of indicators that must include qualitative indicators
Facilitator's Notes	<ul style="list-style-type: none"> • Facilitators that don't have a strong background in RBM and related tools should read Global Affairs Canada's RBM Guidance in preparation for the following sessions, and in particular those sections that discuss outcomes, indicators and data collection methods. Another useful sources is the World Banks 10 Steps to RBM and Evaluation Systems. • This is not an RBM or M&E training – but this basic discussion can help participants contribute to and support the development of M&E tools and systems that reflect gender equality best practices.
Duration	70 minutes
Activities	<ul style="list-style-type: none"> • Introduction (40 minutes) • Activity (20 minutes) • Wrap-up (10 minutes)
Resources	<ul style="list-style-type: none"> • Participant Resource Package • PowerPoint
Technology	<ul style="list-style-type: none"> • PowerPoint presentation • Zoom

Process

#	Facilitator Steps	Technology Support																
1	<p>Having developed their gender transformative outcomes, the groups will now turn to developing quality indicators to support the measurement of those outcomes. Indicators are a key element of the results measurement design (referred to in RBM as the Performance Measurement Framework).</p> <p>Global Affairs Canada provides the following elements in their template for partners, and in this session and the next we will focus on the nature of the circled elements in gender transformative programming: indicators and data sources and collection methods.</p> <table border="1"> <thead> <tr> <th>Expected Result</th> <th>Indicator(s)</th> <th>Baseline Data</th> <th>Targets</th> <th>Data Sources</th> <th>Data Collection Methods</th> <th>Frequency</th> <th>Responsible</th> </tr> </thead> <tbody> <tr> <td>Outcome or results statement</td> <td>What is being measured?</td> <td>Where are you starting from?</td> <td>Where will you end up?</td> <td>Where or who is the data coming from?</td> <td>How is it being collected?</td> <td>How often is this data being collected?</td> <td>Who is collecting the data?</td> </tr> </tbody> </table>	Expected Result	Indicator(s)	Baseline Data	Targets	Data Sources	Data Collection Methods	Frequency	Responsible	Outcome or results statement	What is being measured?	Where are you starting from?	Where will you end up?	Where or who is the data coming from?	How is it being collected?	How often is this data being collected?	Who is collecting the data?	<ul style="list-style-type: none"> Start the PowerPoint and share the screen. Progress through the accompanying slide(s). Follow the cues from the Facilitator when to switch slides.
Expected Result	Indicator(s)	Baseline Data	Targets	Data Sources	Data Collection Methods	Frequency	Responsible											
Outcome or results statement	What is being measured?	Where are you starting from?	Where will you end up?	Where or who is the data coming from?	How is it being collected?	How often is this data being collected?	Who is collecting the data?											
2	<p>First, to ensure we have a shared basic understanding of what an indicator is, we will cover basic definitions and types of indicators.</p> <p><i>Ask participants, what is an indicator?</i></p> <p>Simply put, an indicator is a signal that shows change has happened. Quality indicators are built in a specific way and have specific attributes, and many of you will be familiar with the GAC definition of an indicator:</p>	<ul style="list-style-type: none"> Progress through accompanying slide(s) 																

Note: According to GAC, an indicator, also known as a performance indicator, is a means of measuring actual outcomes and outputs. It can be **qualitative** or **quantitative**, and is composed of a unit of measure, a unit of analysis and a context. Indicators are **neutral**; they neither indicate a direction of change, nor embed a target.

3 Let's quickly unpack what each of these terms mean:

There are two types of indicators:

Quantitative Indicators	<ul style="list-style-type: none"> Quantitative indicators are used to measure quantities or amounts. They are <i>objectively verifiable</i>. For example: temperature, distance, middle upper-arm circumference, death rate, but also individual knowledge and skills.
Qualitative Indicators	<ul style="list-style-type: none"> Qualitative indicators are <i>subjective</i>. They capture experiential information, such as the quality of something, or beneficiaries' perception of their situation, their opinion or preferences. They also would measure an individual's <i>perception</i> of their own knowledge or skills.

Ask for a quick shout out, answering the following questions:

Which type of indicator, qualitative or quantitative, do you think would be particularly important for measuring transformative change? Ask a couple of volunteers to explain why.

Note: It is important to distinguish between qualitative and quantitative **indicators** and **data collection methods**. We'll be discussing data collection methods in the next session.

- Progress through accompanying slide(s)

4 Every **indicator has 3 building blocks:**

1. The **unit of measure** is the number, percentage, level, ratio, etc.
2. The **unit of analysis** is who or what will be observed: individuals, institutions, social artifacts or social groups
3. The **context** is the set of circumstances that specify the particular aspect of the output or outcome that the indicator is intended to measure.

- Progress through accompanying slide(s)

Unit of Measure	Unit of Analysis	Context
#/total	Adolescent girls and boys aged 15-19 (disaggregated by rural/urban setting)	Who have attended a health clinic in the past 12 months.
Level of confidence	of male partners of women of child-bearing age	In the privacy provided during family planning counselling
%/total	health institutions (public/private)	providing gender sensitive services to ethnic populations in their language of choice
Degree of support	Amongst adult males	For women's engagement in work outside the home
%/total	of individual citizens trained (disaggregated by sex, age, and provinces)	reporting change in media consumption habits one month after participating in the propaganda-proof training
#	of policy proposals passed	that create conditions for national reconciliation in conflict zones
Ratio	of women to men	in decision-making positions in the government

Ask participants to identify the specific aspects of the indicators in the table that make them **gender sensitive**. Please note, for the facilitator, they're written in **red text**.

Finally, an indicator should be **neutral** — meaning that it does not indicate a direction of change (for example 'increased' or 'improved'), and it does not include a target (a target is usually identified after a baseline is established).

5

Now that everyone has the basics, explain that you're going to discuss how indicators can best serve **gender equality objectives**.

An indicator must always be developed or selected to **effectively capture the level of change** of a result (transformative/aware/etc.), and must **always be gender sensitive**, regardless of the level of change. Gender sensitive is the *minimum* level of gender integration.

What do we mean by this? When we talk about gender transformative results, in order to be **effective**, we want to measure changes in attitudes and perceptions about the value of women and girls, and their agency and decision making. Most outcomes have multiple indicators and will include some that are quantitative and some that are qualitative.

Gender Sensitive indicators do the following:

- Disaggregate by sex and age
- Disaggregate by other relevant factors of intersectionality
- Use language that describes in gendered detail the unit of analysis
- Use language that includes gender-related elements of the context

- Progress through accompanying slide(s)

6

Show the example of the following Outcome Statement: **Increased empowerment of adolescent girls to claim their right to safe and accessible contraceptive services and resources.**

Ask in plenary: In order to respond to this outcome, would we want to measure only the rate of usage of contraceptives by adolescent girls?

- Progress through accompanying slide(s)
- Consider using gallery view during plenary discussion

Give participants an opportunity to answer in plenary, and then explain that **no** – in fact, we **also** must measure whether that *right* is being realized – which requires us to measure their agency in the decision to use contraceptives. Usage rates alone do not tell us about an adolescent girl’s **empowerment**.

Discuss: In an extreme example, take a reduction in rates of maternal mortality (MMR). The right to quality sexual and reproductive health services, including maternal, newborn and child health services, should definitely result in a reduction in MMR. However, that can also be achieved without the realization of rights or the empowerment and agency of women and girls. Consider if a state mandates a facility-based delivery for all births – while this would likely reduce the MMR, it is a decrease in agency and decision-making power for women and girls.

Explain that for health programming, we want to measure the improvement of health outcomes – but from a gender equality and rights-based perspective, we also want to measure **how** those outcomes have been improved, and whether those improvements have been achieved through **increased agency**, which is essential for **empowerment**.

7 *Explain to participants* that before they develop their indicators for their outcome statements and include terms like ‘agency and empowerment’, it is helpful to ask themselves: **How can we measure complex concepts like agency, choice and empowerment?** Participants might come up with three possibilities – if not, facilitators can introduce the following:






Let’s talk through some of the strengths and limitations of several approaches:

- Asking beneficiaries directly about their empowerment, agency, choice.
- Using an indicator that *suggests* empowerment/agency, sometimes known as a ‘proxy’ indicator.
- Using a composite indicator or index to measure the multi-dimensional aspects of empowerment and agency.

- Progress through accompanying slide(s)
- Consider using gallery view during plenary discussion

Ask participants what they think are the advantages and disadvantages of each – use the resource in **Annex 14a** to guide your discussion.

Present and explain an example of an index, using either the [Hunger Project's Women's Empowerment Index](#) or the [Women's Empowerment in Agriculture Index](#). For example, the Hunger Project's WEI is composed of 5 key areas or 'domains':


	Agency	Women are able to make decisions and exercise control over resources and are free to exercise these decisions without fear of repercussion.
	Income	Women have the ability to benefit from economic activities and enhanced access to markets and financial resources
	Leadership	Women have the ability to participate in community activities and are encouraged to speak in and for their communities.
	Resources	Women and girls have access to the resources and skills they need to become equal participants in society
	Time	Women and girls are reducing domestic drudgery (time spent on hard, menial, or dull work) freeing up time to pursue productive endeavors, education, child care, and leisure activities.

Activity 1: Quality Indicators for Gender Equality Outcomes


8 *Ask participants* to refer to Activity 14.1 in their **Participant Resource Package** where they will find their group links and see detailed activity instructions. Using the outcomes generated in a previous session, participants are to develop quality indicators for one immediate and one intermediate outcome that capture gender equality changes in an effective way in their groups. Give the groups about **30 minutes** to think of their indicators.

Ask participants to remember:

- An outcome can have multiple indicators! For example, an outcome related to improved sexual and reproductive health could have an indicator on reduced teenage pregnancy rates, increased household decision making, and reduced incidents of sexual and gender-based violence.
- There are no PERFECT indicators – and this is not an M&E training. Groups should focus on capturing the gender transformative change they’ve described in their outcome statements.

 **Note:** It is important for facilitators to pop in and out of the different Zoom break-out rooms in order to support group discussion and ensure groups are on the right path.

- Progress through accompanying slide(s)
- Separate participants into their assigned Zoom break-out room
- Move the facilitator in and out of the different group break-out rooms in order to ensure participants are on the right track
- Keep an eye out for groups that need support (look at the chats, look for raised hands, etc.)

 **Note:** Consider populating separate rows within groups’ LMs (Google Sheet) for their indicators.

9 Bring the groups back to plenary and have 1 person from each group share their indicators. Invite feedback and ideas from the rest of the groups, keeping it constructive.

There is an art to developing or selecting indicators and it takes practice – allow the Monitoring & Evaluation (M&E) folks in the room to support the construction of the indicators – but try not to get too caught up in the M&E technical aspect of indicator development.

- Bring everyone back to plenary
- Consider utilizing the gallery view for plenary discussion

10

Close the session with the **key messages**:

1. Indicators are a signal of change, and need to effectively respond to the level of change in project outcomes; they cannot be gender transformative but **MUST** be gender sensitive as a minimum level of gender equality integration
2. Gender transformative change refer to changes in social behaviours and attitudes (position, not just condition), and therefore requires a combination of indicators that must include qualitative indicators

- Progress through accompanying slide(s)

Annexes

Annex 14a: How to measure Empowerment and Agency

A direct question about empowerment would have participants indicate whether they have experienced empowerment. For example: *'Do you feel empowered with respect to decisions related to your reproductive health?'*. Self-reporting the experience of complex and multi-dimensional phenomena like empowerment or agency can be problematic for a couple of reasons: it assumes that the respondent has a shared understanding of the meaning of the concept; it assumes that the respondent sees no risk or benefit to responding positively or negatively to a question of their own empowerment or agency; it assumes that their understanding of that concept will have remained the same over a period of time.

A 'proxy' indicator is an indicator that is used in place of a direct measurement. Much like it sounds, it 'approximates' or represents a phenomenon or occurrence. For example, increased income is often used as a 'proxy' for economic empowerment. The assumption is that increased income suggests that economic empowerment has taken place. However, proxy indicators can be problematic when it comes to elements of control and choice. In the case of economic empowerment, it is important to understand other elements of agency and empowerment related to the increased income: for example to understand whether she is able to choose how the increased income is spent, whether the increased income was gained through exploitative practices, whether earning the increased income was her choice, and whether it has improved her wellbeing or merely added to her burden of work and vulnerability.

A composite indicator or index aggregates multiple elements to create a single measurement for complex, multi-dimensional phenomena. These indicators can be composed of multiple quantitative and qualitative sub-indicators. For example, a composite index used to measure women's economic empowerment might include elements that measure their increased income, their decision-making role in household expenditures, and changes in their burden of unpaid household labour and care. The advantages of a composite indicator or index are many: it can be designed in response to specific context, project design and priorities; the sub-indicators or domains can usually be disaggregated and provide a deeper and more insightful understanding of the change (or lack of change) that is occurring; and most importantly, it affords the space to explore these multi-dimensional aspects of agency and empowerment. Disadvantages may include the fact that the development and analysis of composite indicators requires a higher level of technical skill, that the complex nature of its design means that a newly designed composite should be tested before applied, and the design usually involves assigning weights and thresholds, which can embed bias and assumptions into the tool and the calculation of results. In addition, a composite indicator or index can require a more lengthy tool or data collection process because it reflects multiple dimensions, which have time and budget implications.

Session 15: Data Collection Tools and Sources for Gender Equality Indicators

Learning Objective Participants will understand how feminist principles and gender transformative programming can be reflected and promoted in data collection design.

Key Messages

- The voices of women and girls is essential for the measurement of gender transformative change and to align with feminist approaches to MEAL
- There is a wide variety of data collection tools that can effectively respond to indicators, and all have the *potential* to challenge power dynamics, align with feminist principles, and contribute to the measurement of transformative change – depending on the *process* of their use.

Facilitator’s Notes

- Make sure that before facilitating this session, you have a good basic understanding of the data collection tools and sources that are being discussed. You don’t need to be an expert, but you should be able to answer general questions about different methodologies.

Duration 60 minutes

Activities

- Introduction (20 minutes)
- Activity (20 minutes)
- Wrap-up (20 minutes)


Resources

- Participant Resource Package
- PowerPoint

Technology

- PowerPoint presentation
- Zoom

Process


#	Facilitator Steps	Technology Support																
1	<p><i>Explain to participants</i> that during this session, they will be examining the second components of the PMF that was shown to them previously: data sources and data collection methods for gender transformative programming.</p> <table border="1"> <thead> <tr> <th>Expected Result</th> <th>Indicator(s)</th> <th>Baseline Data</th> <th>Targets</th> <th>Data Sources</th> <th>Data Collection Methods</th> <th>Frequency</th> <th>Responsible</th> </tr> </thead> <tbody> <tr> <td>Outcome or results statement</td> <td>What is being measured?</td> <td>Where are you starting from?</td> <td>Where will you end up?</td> <td>Where or who is the data coming from?</td> <td>How is it being collected?</td> <td>How often is this data being collected?</td> <td>Who is collecting the data?</td> </tr> </tbody> </table>	Expected Result	Indicator(s)	Baseline Data	Targets	Data Sources	Data Collection Methods	Frequency	Responsible	Outcome or results statement	What is being measured?	Where are you starting from?	Where will you end up?	Where or who is the data coming from?	How is it being collected?	How often is this data being collected?	Who is collecting the data?	<ul style="list-style-type: none"> Start the PowerPoint and share the screen. Progress through the accompanying slide(s). Follow the cues from the Facilitator when to switch slides.
Expected Result	Indicator(s)	Baseline Data	Targets	Data Sources	Data Collection Methods	Frequency	Responsible											
Outcome or results statement	What is being measured?	Where are you starting from?	Where will you end up?	Where or who is the data coming from?	How is it being collected?	How often is this data being collected?	Who is collecting the data?											
2	<p>Present the lists of data sources and data collection methodologies to the group. Have a brief discussion with the group to make sure everyone understands some of the different tools. <i>Ask</i> the group in plenary to share additional sources and data collection tools. Use the resource in Annex 16a to enrich the lists if needed.</p> <p> Note: There are MANY and not all need to be mentioned!</p>	<ul style="list-style-type: none"> Progress through accompanying slide(s) Consider moving to gallery view for the discussion piece 																

- 3 As you review these lists and add any new ones, ask participants to consider gender transformative programming and feminist approaches. In plenary, lead a brief discussion about which data sources most reflect a feminist approach and would be most essential for understanding women's and girls' empowerment and agency.

Explain to participants:

Qualitative and less formal or structured methodologies are often associated with a feminist approach or feminist principles, because they are thought to be more participatory, to be more likely to acknowledge and challenge the power dynamic between data collector and subject, and to be more effective at capturing individual and subjective experiences. However, there are also those who feel that the characterization of formal, rigorous methodologies as less 'feminine' or feminist is in itself a way of creating false dichotomies.⁴

However, best practice tells us that the strongest MEAL systems will use a mixed-method approach which employs both quantitative and qualitative data to measure changes in state, and will use those to triangulate and build a deeper understanding of change. This obligates us as practitioners, and as advocates for gender equality, to explore how the process and application of these different methodologies **can best reflect feminist principles and effectively measure gender transformative change.**

 **Note:** Sourcing data directly from women and girls is essential to assess change in empowerment and agency. Sourcing data from men and boys is also important to understand the changes in an enabling environment for gender equality, as is data from the community, from service providers and leaders, policy analysis, etc.

- Progress through accompanying slide(s)
- Consider moving to gallery view for the discussion piece

⁴ <http://www.qualitative-research.net/index.php/fqs/article/view/974/2124>

- 4 In plenary, *ask participants* to briefly discuss some of the advantages and disadvantages of different methods of data collection. To support the conversation, ask them to recall their discussions about implementation on the previous day and the elements of time, human resources, and budget. Limit the discussion to **10 minutes**.

- Progress through accompanying slide(s)
- Consider moving to gallery view for the discussion piece

Activity 1: Data sources and Methodologies

- 5 Next, *ask participants* to return to their working groups, and for each of their indicators, determine: The data source(s): the data collection methodolog(ies).

Instruct each group to keep in mind the following during their discussions:

- Using a composite indicator or index, they should list the 'domains' – what will it include? Considering data sources, they should be as specific as possible.
- For each methodology, the groups should identify key considerations in the process that would ensure the amplification of women's and girls' voices, that would promote empowerment and challenge unequal power dynamics, that would allow for co-creation and co-generation of knowledge, etc.

Give groups about **20 minutes** to identify the data sources and methodologies for their indicators. Explain that when they come back to plenary, they might be asked to describe why they chose those data sources/methodologies.

- Progress through accompanying slide(s)

Note: Be cautious not to allow the conversation to go too heavily into the technical details and specifics of indicator and tool development. The purpose here is to apply a gender transformative and feminist lens to the work of MEAL, recognizing this is not exhaustive, and that the design of a PMF and dataflow is a much longer and technical exercise.

6 In plenary, *ask each group* to share one or two examples of their work – give each group **20 minutes**. Invite participants to question, recommend and explore the examples in a positive and constructive way.

- Utilize gallery view for the group share-back

7 Close the session with the **key messages** and thank the groups. Explain that in the next session you will be discussion how the *use of data* can be gender transformative and aligned with feminist principles.

1. The voices of women and girls is essential for the measurement of gender transformative change and to align with feminist approaches to MEAL
2. There is a wide variety of data collection tools that can effectively respond to indicators, and all have the *potential* to challenge power dynamics, align with feminist principles, and contribute to the measurement of transformative change – depending on the *process* of their use.

- Progress through accompanying slide(s)

Annexes

Annex 15a: Data Sources and Data Collection Methodologies

Data Sources: "Is this first hand information, or second hand information?"

Primary

- Participants (individuals)
- Intermediaries
- Government documents (policies, program documents, proclamations, etc.)
- Institutional/organizational records
- Photographs or artifacts
- Physical environment

Secondary

- Demographic health survey data
- Human development report
- Global Peace Index
- Peer reviewed research
- Reports from community of practice

Data Collection Methods

- Surveys
- Focus Group Discussions
- Guided Observation
- Conversation with concerned individuals
- Most significant change
- Field visits/observation
- Transect walk
- Critical reviews of official records or other documents
- Individual and key informant interviews
- Official records/secondary data
- Census
- Scientific research

Annex 15b: Resource List of Tools

These tools have been shared by participants in previous deliveries of this training program. Facilitators are encouraged to continue to build this list and share back to CanWaCH for addition to the program.

- https://learn.tearfund.org/en/resources/publications/footsteps/footsteps_31-40/footsteps_36/the_bead_game/
- https://www.participatorymethods.org/sites/participatorymethods.org/files/all%20together%20now_int%20HIVAIDS.pdf
- https://care.org/wp-content/uploads/2020/05/FP-2013-CARE_CommunityScoreCardToolkit.pdf
- <https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/9809.pdf>


Photovoice Resources

- Bisung, E., Elliott, S. J., Abudho, B., Karanja, D. M., & Schuster-Wallace, C. J. (2015). Using Photovoice as a Community Based Participatory Research Tool for Changing Water, Sanitation, and Hygiene Behaviours in Usoma, Kenya. *Biomed Res Int*, 2015, 903025. doi:10.1155/2015/903025
- Hergenrather, K. C., Rhodes, S. D., Cowan, C. A., Bardhoshi, G., & Pula, S. (2009). Photovoice as Community-Based Participatory Research: A Qualitative Review. *American*
- Simmonds, S., Roux, C., & Avest, I. t. (2015). Blurring the Boundaries Between Photovoice and Narrative Inquiry: A Narrative- Photovoice Methodology for Gender-Based Research. *International Journal of Qualitative Methods*, 14(3), 33-49.
- Sutton-Brown, C. A. (2014). Photovoice: A Methodological Guide. *Photography and Culture*, 7(2), 169-185. doi:10.2752/175145214X13999922103165

Session 16: Accountability—data for whom? Using GE data to strengthen programming and women’s/girl’s participation

Learning Objective	Participants will be introduced to and explore different approaches to accountability and how sharing data and learning can be gender transformative and strengthen programming.
Key Messages	<ul style="list-style-type: none">• Good accountability and learning practices should include mechanisms for upward accountability, downward accountability and horizontal accountability that reflect gender equality considerations• From a rights-based and feminist perspective, beneficiaries (or participants) themselves must be equal owners of the data (by having access to it, understanding it, contributing to its analysis and use).
Facilitator’s Notes	
Duration	80 minutes
Activities	<ul style="list-style-type: none">• Introduction (15 minutes)• Activity 1 (30 minutes)• Activity 2 (20 minutes)• Wrap-up (15 minutes)
Resources	<ul style="list-style-type: none">• Participant Resource Package• PowerPoint
Technology	<ul style="list-style-type: none">• PowerPoint presentation• Zoom

Process

#	Facilitator Steps	Technology Support
1	<p><i>Explain to participants:</i> you've now discussed what information you want to collect and how you will collect it. In this session you will be exploring the following questions from the perspective of gender transformative programming.</p> <ul style="list-style-type: none"> ○ Data for <i>what purpose?</i> ○ Data for <i>whom?</i> <p><i>Ask participants</i> to discuss in plenary: What do we use data for?</p> <ul style="list-style-type: none"> ● To understand progress ● To improve programming ● To communicate progress ● To report and be accountable for achievement of outcomes 	<ul style="list-style-type: none"> ● Start the PowerPoint and share the screen. ● Progress through the accompanying slide(s). ● Follow the cues from the Facilitator when to switch slides.
2	<p><i>Ask participants</i> to recall the earlier discussion about the definitions behind M-E-A-L. What did we mean by accountability?</p> <div style="background-color: #fff9c4; padding: 10px; border-radius: 5px; margin: 10px 0;"> <p> Note: Accountable means obligated to explain, justify, and take responsibility for one's actions, and to answer to someone.⁵</p> </div> <p>Recall: ACCOUNTABILITY mechanisms include crucial information sharing to project or organization stakeholders about the delivery of services, the use of resources, and the achievement of outcomes. This includes project donors, partners and beneficiary or participants communities. Accountability to government or donors is sometimes referred</p>	<ul style="list-style-type: none"> ● Progress through accompanying slide(s)

⁵ Dictionary.com

to as 'upward accountability', accountability mechanisms targeting beneficiary groups or communities is referred to 'downward accountability', and 'horizontal accountability' refers to sharing and learning activities with partners, colleagues, peer organizations and stakeholders.⁶

3 *Explain to participants:* what is meant by upward, downward and horizontal accountability – who is the audience for each of these levels of accountability?



- Progress through accompanying slide(s)

4 Let us start with **Downward Accountability**. Take **10 minutes** to discuss the following questions with participants. Use the resource in **Annex 16a** to support your facilitation if needed. This mural link is listed in Activity 16.1 in their **Participant Resource Package**. The facilitator(s) will be capturing the discussion on the Mural page, but participants are also welcomed to join the Mural page and input their own ideas.

- Progress through accompanying slide(s)
- The facilitator is going to lead the discussion, while the tech support populates the brainstormed ideas on a Mural page.

⁶ Note that some participants may rightly observe that the terms 'upward' and 'downward' accountability employ a language of hierarchy that implies an associated importance which would be interrogated and rejected by many feminist approaches.

Downward Accountability

- What kind of activities does this include?
- Why is downward accountability important? Why specifically for gender transformative programming?
- What are the benefits? For whom?
- Do we do it enough? Why not?

If we agree it is incredibly important, **how** do we do it? And in particular, how do we do it in a meaningful way? Linked to feminist principles, and an empowering experience in and of itself for participants.

- Participants are also encouraged to enter the mural page and input their own ideas
- Provide participants with the Mural link in the Zoom group chat

Activity 1: Case Study

- 5** Guide participants to Activity 16.1 in their **Participant Resource Package**. Explain to participants that they'll be discussing this methodology as an example of one approach to downward accountability. Present the brief overview of the methodology and then ask participants to review the methodology description – give them 5 minutes.

In plenary, take **20 minutes** to discuss the following:

- How is this example empowering to participants?
- What gender and intersectionality considerations would need to be included in this methodology?
- What are the implications for implementation (HR, timeline, budget)?

These questions are also listed in their **Participant Resource Package**.

- Progress through accompanying slides
- Move to gallery view for plenary discussion

6 *Explain* that you will explore how the other areas of accountability can reflect a transformative or feminist approach.

Note! For the discussion, encourage participants to share anecdotes from their own experience!

We will have **30 minutes** for this discussion to brainstorm thoughts on mural. Explain that you will return to the Mural where the discussions on Downward Accountability were captured above and build on those notes.

Upward Accountability

- What kind of activities does this include?
- Why is this level of accountability important in gender transformative programming?
- How can we use our donor reports to advocate for women’s empowerment and rights-based approaches?
- What is it that we report on? What do we highlight? How do we present our data?

Horizontal Accountability

- What kind of activities does this include?
- Why is this level of accountability important in gender transformative programming?
- How can horizontal accountability reflect and promote feminist principles?
- How can horizontal accountability improve gender transformative programming?

7 Close with **key messages:**

1. Good accountability and learning practices should include mechanisms for upward accountability, downward accountability and horizontal accountability that reflect gender equality considerations
2. From a rights-based and feminist perspective, beneficiaries (or participants) themselves must be equal owners of the data (by having access to it, understanding it, contributing to its analysis and use).

- Progress through accompanying slide(s)
- The facilitator is going to lead the discussion, while the tech support populates the brainstormed ideas on a Mural page.
- Participants are also encouraged to enter the mural page and input their own ideas
- Provide participants with the Mural link in the Zoom group chat

- Maintain the accompanying slide(s)

Annexes

Annex 16a: Accountability Discussion Support

Below are some ideas to support the discussions in this session. Facilitators should reflect on these ideas and include their own thoughts and experiences to enrich and contextualize the content.

Downward Accountability

What kind of activities does this include?

- Communication of results and progress to beneficiaries/participants
- Validation of results through participatory analysis and interpretation.

Why is downward accountability important? Why specifically for gender transformative programming?

- A rights-based approach, which is essential for transformative programming, demands that participation, transparency and accountability are at the core of processes and programming. Downward accountability should be central to program design and implementation.
- The core of gender transformative programming is shifting patterns of power, and empowering those who have been marginalized or excluded – both through the initiative results, as well as through participation in the process.
- Gender transformative programming is focused on building agency and empowerment, and that includes ownership of information and co-creation of knowledge. “Nothing about me, without me”.

What are the benefits? For whom?

- Information and participation are key to empowerment. By ensuring that both processes and results are co-owned and validated, participants can benefit from increased agency.
- Practitioners have an obligation to be accountable to community/participants/beneficiaries. But in addition, the process of co-creation of knowledge can benefit and strengthen the design and also the credibility of a program or initiative.

Upward Accountability

What kind of activities does this include?

- Reporting to or sharing progress/results to donors
- Reporting to or sharing progress/results to clients⁷
- Reporting to board members or owners

Why is this level of accountability important in gender transformative programming?

- Where clients/donors are prioritizing transformative change, upward accountability demands that progress/results are effectively achieved and reported.
- Organizations and institutions can have an important influence on the decisions and priorities of donors, clients, etc, though the way they share data, results, lessons learned. When gender transformative change is monitored, measured and reported on, it can drive change upwards by demonstrating pathways to change.
- Constraints and challenges to transformative change that are related to the scope, scale and parameters laid out by donors/clients can be addressed through reporting and sharing. For example, budgets and timelines that do not afford adequate space for the achievement of social change are more likely to be adjusted when practitioners and partners demonstrate how those constraints are hindering results.

How can we use our donor reports to advocate for women's empowerment and rights-based approaches?

- The more we focus on the quality of gender analysis in our reporting, the more we build the capacity of our donors and recipients to understand gender equality outcomes
- The more we highlight cost, time, and human resources in our reporting for gender transformative programming, the more effectively we can advocate for longer timelines, larger budgets, etc.

⁷ The term 'client' usually refers to the person or group to which a service is provided, and from whom a payment is issued. 'Client' can therefore be used by some organizations to refer to beneficiaries (recipient of services), and by others to refer to groups or individuals providing payment (funders). When referring to upward accountability, we are using the latter understanding of the term.

What is it that we report on? What do we highlight? How do we present our data?

- Regardless of the focus of an initiative, gender equality considerations and contributions to social change can either be highlighted as important or can be downplayed in reports and presentation of data, and the voices of women/girls/gender-marginalized people can either be excluded or amplified. From the simple act of disaggregating data effectively, to deeper analysis and interpretation from a gender perspective, and of gender transformative change (or lack of change). Raising awareness amongst donors/clients about progress (or lack of progress) towards gender equality is an important step in furthering the conversation, and advocating for increased support.
- Gender transformative changes takes time and is complex. Outcomes are not always achieved to the extent that was planned, and it is essential that the reasons for inadequate results are well understood and reported on. This not only improves programming within the organization, but can contribute to the improvement of the sector by informing donors/clients and their funding schemes/parameters.

Horizontal Accountability

What kind of activities does this include?

- Participating in and sharing with communities of practice (for example, clusters)
- Publishing reports and lessons learned to contribute to sector
- Open-sourcing methodologies, tools, resources
- Working through and contributing to partnerships and opportunities for collaboration/sharing

Why is this level of accountability important in gender transformative programming?

- Social transformation must be effective as a movement for change, and cannot be achieved through unilateral and isolated initiatives or actors.
- Feminist principles demand that collaboration, transparency, cooperation and inclusion are driving factors in work for gender equality and social change. Mutual accountability for the realization of these principles is key to building a movement for change.

How can horizontal accountability improve gender transformative programming?

- Gender transformative change is complex, and must reflect intersecting factors of exclusion and marginalization. When organizations engage in mutual accountability within a community of practice, a diversity of voices is heard and can inform programming/initiatives across the sector.
- When organizations are held accountable by a community of practice, and behave in a way that is accountable to others, it raises all standards in the movement for social change. "A rising tide floats all boats".

Annex 16b: Downward Accountability Case Study

Leading for Peace: Participant Engagement and Indicator Pathway	
Project	Leading for Peace
Organization	Plan International Canada
Duration	5 years
	140,000 beneficiaries (Victims of the armed conflict, with a focus on children, adolescents and youth)
Location	Colombia
Thematic Areas	Peace building; child protection; rights, citizenship and participation; economic empowerment; institutional strengthening (Victims of Armed Conflict Unit)

Activity Objectives

With project participants (children, adolescents, youth and adults):

- Share and have a clear understanding of the objectives of the project
- Share and interpret evaluation results (baseline, midline, endline)
- Agree on actions required to improve programming and achieve expected results

Methodology

Part 1: Infographic Video⁸

Step 1: Based on results from the study (baseline, midline or endline) an **infographic video is designed and produced**. The video is child and adolescent friendly and explains main results in an easy to understand and dynamic way. It is used for communications campaigns but is also a key piece during the information sharing workshops.



Step 2: Community members are invited to participate in the **information sharing workshop**. This is done in every region (Chocó, Valle del Cauca and Nariño) and separate workshops are conducted for different age groups (Children, adolescents, youth and adults) and sex. Between 15-20 people are invited per session.

Step 3: During the workshop, after introductions and ice breakers, the info graphic video is presented to participants. They are then **asked to reflect on what was the most interesting thing they saw in the video and why**. Methodology changes depending on the age group. Children are asked to draw, adolescents and youth are asked to form groups of three, discuss and right their ideas on a flipchart. For adults it can be done via flipcharts or in a discussion in plenary (mainly for public servants or teachers) with facilitator writing and organizing ideas on post-its.



⁸ <https://www.youtube.com/watch?v=kqpKjeoB1tE>

Step 4: **Results from previous step are shared.** For children, drawings are placed on the wall and children are asked to voluntarily explain their drawing. They are also asked to go through the room and choose the drawing(s) that **they like and asked to explain why**. For youth and adolescents, each group presents the content of the flipchart to the rest of participants. For adults, facilitator moderates a conversation around the main topics identified.

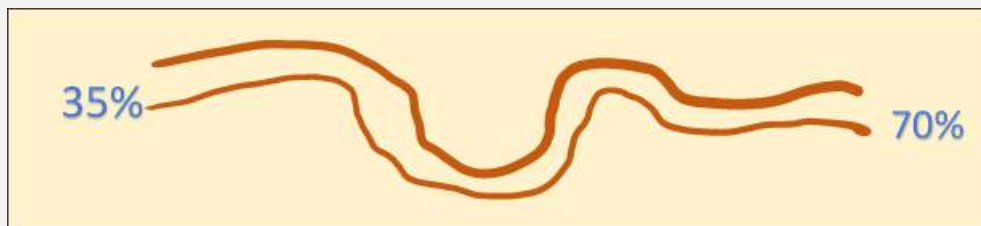
Part 2: Indicator Pathway

Not all indicators in the PMF are relevant for all age groups (economic empowerment is only relevant for youth, for example), so only the indicators that are relevant will analyzed with each age group. The methodology changes slightly by age groups but is in essence very similar.

Step 1: Write the indicator statement on a flipchart and underline the key components. Then ask participants to brainstorm in groups about **what each component means to them**. Have each component as a title in separate flipcharts, bring the group together and write their suggestions in the flipchart under each component. The facilitator clarifies and expands as required.

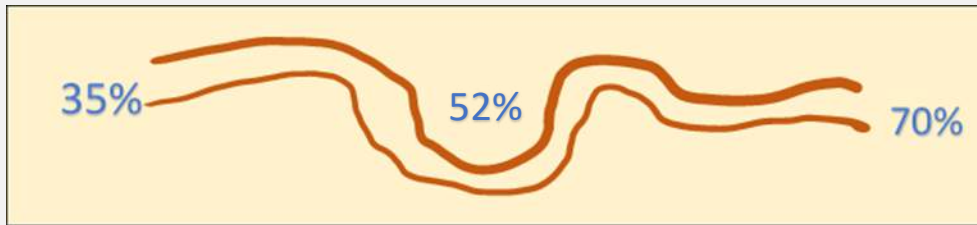
Indicator example: % of GBAY victims with adequate knowledge of self-care protective actions and institutional and community-based protection systems
**GBAY: girl and boy adolescents and youth*

Step 2: Once key concepts of the indicator are clarified, on a larger flip chart, include the indicator and value (in this case for the baseline measurement) to the left. On the right include the target figure. Depending on the age group **explain these figures further**, so for example using a 1-10 scale, participants themselves or objects (marbles/apples) as opposed to percentages. A volunteer is selected to **draw a pathway** between the baseline figure and the target.



Step 3: Then participants are asked to state **what they think should be done or improved to achieve the targets**. The facilitator will write the ideas along the pathway.

Step 4: For additional measurements (midline, endline), flipcharts constructed at baseline are re-used. If required, steps 1 and 2 are done again, plus a refresher on the actions proposed to meet the target in the previous exercise. The original flipchart is put on the wall and then the new data (midline, endline) is added.



Step 5: Facilitator then guides a **participatory discussion** with the following guiding questions:

- Have we reached our target/objective? Why do you think we have or have not reached our objective?
- What actions (as stated in the pathway) were accomplished/completed? Which were not?
- What do we need to add or improve to reach the proposed objective?

Session 17: Wrap Up

Learning Objective

To reflect on the value of the training and identify next steps for new skills and knowledge.

Key Messages

- A training is only as valuable as the change it produces
- Each individual participant will take their new skills and knowledge in a different direction
- CanWaCH will continue to support this process for members and participants

Facilitator's Notes

- Make sure to have copied your Sli.do from the introductory session into your presentation, as well as identifying your own 'next steps' to indicate to your participants what they can expect after this training in terms of follow up and support

Duration

30 minutes

Activities

- Intro (10 minutes)
- Sandwich Feedback Discussion (10 minutes)
- Next steps/questions (10 minutes)

Resources

- Participant Resource Package
- PowerPoint

Technology

- PowerPoint presentation
- Zoom

Process

#	Facilitator Steps	Technology Support
1	<p>Welcome participants to the wrap-up session by congratulating them on all their incredible work and thanking them for their active and respectful participation.</p> <p><i>Explain</i> that during this session, they'll have a chance to reflect on the training and their own participation, and to share with each other those reflections.</p> <p><i>Ask participants</i> to recall the original training objective:</p> <p><i>"This training is about strengthening the confidence and capacity for both gender experts and non-experts in the application of gender transformative programming in women's and children's health."</i></p> <p><i>Ask</i> them also to recall how they responded to the first Sli.do question in the introductory session: <i>'How do you participate in group settings/trainings? How would you describe yourself?'</i>. And ask them to remember what participation goals they set for themselves – and to reflect on whether they achieved those goals and were provided the space to achieve the participation they were hoping for.</p>	<ul style="list-style-type: none"> • Progress through accompanying slides • Ensure that an image of the group's original Sli.do is pasted into your slide presentation

Activity 1: Reflection

- 2 *Explain* that to wrap up the training, they will explore the training objectives and their own personal goals. A critique, even a constructive one, can sometimes be uncomfortable in plenary. Participants will be put into pairs or small groups of 3 and discuss some 'sandwich feedback' - which includes identifying something positive, some constructive feedback, and then another positive point.

Ask them to discuss within their smaller group some of the aspects of this experience that they feel they will benefit from in both their work, and also on an individual level – this can be related to the content, the experience, or even the people they met! No process is perfect, though – and participants must get a chance to share how they feel the process could have been improved, or where they feel that the objectives were not entirely met. Explain that this will also help improve the tools and methodology for next time, and their constructive feedback is very welcome.

In groups, give them **10 minutes** to discuss and identify:

- 1) Is it likely that this experience will change the way they work?
If yes, how? If no, why not?
- 2) How could this experience have been made stronger or more helpful?
- 3) As an individual, what have you gained from this experience?

They can write these down and share them with the facilitator, wait and share them as comments in the training evaluation, or if the group is comfortable, they can be read aloud and discussed.

- 3 After 10 minutes, bring the groups back to plenary – invite any participants to volunteer their comments or reflections. Also explain that they'll have a chance to share those reflections in the training evaluation.

- Send participants into their pre-determined break-out groups.
- Facilitators should not circulate during this activity.

- Bring the group back and enter gallery view for the plenary discussion.

- 4 Thank the groups for sharing with each other and for any who volunteered to share their reflections in plenary.

Close the session by explaining what participants can expect as next steps to the training. In addition to any actions or commitments your organization wants to make, be sure to include the following:

1. A training evaluation will be shared with the group and can be completed online and is anonymous.
2. A folder with the links and resources that were created and use during the training will be shared so that participants can continue to use those as resources and references.
3. Information on the availability of ongoing follow up and support that will be provided as participants integrate their new knowledge and skills into their work.

Facilitators might also want to acknowledge the contributions of others in the preparation and delivery of the training (for example, support with the technical components or co-facilitation, provision of any additional content, etc).

- Progress through accompanying slides

Annexes

Annex 17a: Training Evaluation

Note: Consider replicating this training evaluation form into Google Forms (or a similar program) that allows participants to virtually complete the evaluation in a user-friendly format.

The purpose of this training evaluation is to better understand the degree to which the training was valuable and effective for you, and also to inform and adjust the finalized content and approach.

It should take about 10-15 minutes to complete.

The evaluation will be anonymous and is not a test – your honest and thoughtful feedback is welcome and appreciated. Please don't hesitate to reach out to [**input Facilitator's name(s)**] directly if you have any questions or concerns.

PART ONE: Training Content

This section helps demonstrate how effectively the content was conveyed by the training and retained by participants.

1. What is the difference between gender and sex?

(input response in red)

2. Using the difference concepts learned, how would you describe the difference between gender aware and gender transformative?

(input response in red)

3. Gender transformative change is defined as: Highlight the correct answer yellow

- A. Deep structural change achieved by addressing the root causes of gender inequality
- B. Ignores gender norms, roles and relations and very often reinforces or aggravates gender-based discrimination
- C. A range of social movements, political movements, and ideologies that aim to define, establish, and achieve the political, economic, personal, and social equality of the sexes
- D. Both A and B

4. What is at the root of gender inequality and exclusion/discrimination?

(input response in red)

5. Why is there such a broad range of identities under the LGBTQ2S+ umbrella?

(input response in red)

6. What are examples of intersecting identities? Highlight all that apply.

- Nationality
- Gender
- Ability
- Class
- Sexual Orientation
- Race

7. Describe the difference between a human rights-based approach and an instrumentalist approach:

(input response in red)

8. What are the key principles that guide all stages of implementation of a human-rights based approach? Highlight all that apply.

- Equality and non-discrimination
- Participation and Inclusion
- Transparency and accountability
- Benefits others

9. What elements does a gender equality outcome statement have? Highlight all that apply.

- GE outcome statements always add 'especially women' to a result statement
- GE outcome statements explicitly describe an improvement or positive change related to gender equality
- GE outcomes statements do not merely refer to 'women and men' or add 'including girls' to the stated result

10. List two examples of how MEAL (monitoring, evaluation, accountability, learning) activities can be gender transformative:

(input response in red)

11. Which type of indicator, qualitative or quantitative, do you think would be particularly important for measuring gender transformative change? Highlight the correct answer yellow

- Qualitative
- Quantitative

12. Gender sensitive indicators: Highlight the correct answer yellow

- Disaggregate by sex and age
- Disaggregate by other relevant factors of intersectionality
- Use language that describes in gendered detail the unit of analysis
- Use language that includes gender-related elements of the context
- All of the above

13. Using a feminist approach, interventions should primarily be accountability to whom? Highlight the correct answer yellow

- Donors/clients
- Government and taxpayers
- Community members
- The women's movement
- Individual women and girls

PART TWO: Training Delivery

This section will help to understand whether the facilitation and delivery was effective.

1. Was there an effective balance between group work and facilitator instructions? Highlight your choice on the below "scale"

- 1 (Not effective balance)
- 2
- 3
- 4
- 5 (Very effective balance)

2. Did the facilitation allow for enough active participation? Highlight your choice on the below "scale"

- 1 (No)
- 2
- 3
- 4
- 5 (Yes)

3. What did you prefer, break-out room activities or gallery view group discussions? Highlight your choice

- Break-out room activities
- Gallery view group discussions

4. Did the online training platform feel like a safe space to participate in? Highlight your choice on the below "scale"

- 1 (Not really)
- 2
- 3
- 4
- 5 (Yes, absolutely)

5. If you scored the question above low (1-3), please explain.

(input response in red)

6. Did the facilitator effectively respond to comments, questions, and feedback throughout the training? Highlight

your choice on the below "scale"

- 1 (no, not really)
- 2
- 3
- 4
- 5 (yes, very effectively)

7. In terms of technology and the training platform, what were 2 elements that were most effective?

(input response in red)

8. In terms of technology and the training platform, what were 2 elements that were least effective?

(input response in red)

9. For future trainings, is there anything that could have been done differently to ensure quality learning and participation?

(input response in red)

10. How would you prefer the training to be rolled out? (approx. 18 hours of training exposure) Highlight your choice

- 3 full days (9am – 5pm)
- 4 partially full days (9:30am – 3:30pm)
- 5 half days (give or take) (1pm – 4:30pm)
- Other: (insert other response, if applies, in red)

11. Please indicate the degree to which you anticipate applying this knowledge to your work: Highlight your choice on the below "scale"

- 1 (Not really)
- 2
- 3
- 4
- 5 (Yes, absolutely)

12. If you scored the question above low (1-3), please explain.
(input response in red)

Annex 17b: Training Evaluation Answer Key

PART ONE: Training Content

This section helps demonstrate how effectively the content was conveyed by the training and retained by participants.

1. What is the difference between gender and sex?

Sex: The biological difference between women/men, boys/girls. It is universal, unaffected by culture and geography and is very difficult to change.

Gender: Refers to the norms, expectations and beliefs about the roles, relations, capabilities and values attributed to girls and boys, women and men. These norms are socially constructed, they are not biologically determined. They vary between cultures and change over time.

2. Using the difference concepts learned, how would you describe the difference between gender aware and gender transformative?

Gender Aware: A policy or program that seeks to improve the daily conditions of women, girls and gender diverse people by addressing practical gender issues and needs. These policies or programs don't address gender relations or improve the social position of girls, women and gender diverse individuals (i.e. how they are valued in society)⁹.

Gender Transformative: A policy or program that addresses the causes of gender-based health inequities by including specific ways to shift harmful gender norms, roles and relations with explicit intentions to change unequal power relations. The focus goes beyond improving the condition of women, girls and gender diverse individuals and seeks to improve their social position (i.e. how they are valued in society)¹⁰.

⁹ <http://downtozeroplatform.com/dtz/files/Plan%20Netherlands%20Gender%20Equality%20Programma%20Criteria.pdf>

¹⁰ <http://downtozeroplatform.com/dtz/files/Plan%20Netherlands%20Gender%20Equality%20Programma%20Criteria.pdf>

3. Gender transformative change is defined as:

- E. Deep structural change achieved by addressing the root causes of gender inequality
- F. Ignores gender norms, roles and relations and very often reinforces or aggravates gender-based discrimination
- G. A range of social movements, political movements, and ideologies that aim to define, establish, and achieve the political, economic, personal, and social equality of the sexes
- H. Both A and B

4. What is at the root of gender inequality and exclusion/discrimination?

Unequal power relations.

5. Why is there such a broad range of identities under the LGBTQ2S+ umbrella?

Gender identity, expression and sexual orientation are complex and diverse, they are fluid – meaning they can change over time – and they are individual.

6. What are examples of intersecting identities?

- Nationality
- Gender
- Ability
- Class
- Sexual Orientation
- Race

7. Describe the difference between a human rights-based approach and an instrumentalist approach:

Human-rights based approach

A human rights-based approach to international assistance is a tool to help countries meet their human rights obligations and assist people in knowing their human rights and the processes available to claim them.

In doing so, it seeks to achieve equitable and sustainable results. It reinforces a feminist approach, as human rights are at the foundation of gender equality and the empowerment of women and girls.”

Instrumentalist approach

Can be understood by asking: “*if this problem is solved, what additional external benefits will be seen by others (i.e., community, economy, etc.)*”?

An instrumentalist approach to gender equality sees it as a *means* to the achievement of other goals, such as economic development or sustainable peace and security.

8. What are the key principles that guide all stages of implementation of a human-rights based approach?

- Equality and non-discrimination
- Participation and Inclusion
- Transparency and accountability
- Benefits others

9. What elements does a gender equality outcome statement have?

- GE outcome statements always add ‘especially women’ to a result statement
- GE outcome statements explicitly describe an improvement or positive change related to gender equality
- GE outcomes statements do not merely refer to ‘women and men’ or add ‘including girls’ to the stated result

10. List two examples of how MEAL (monitoring, evaluation, accountability, learning) activities can be gender transformative:

- Monitors female and male beneficiaries and stakeholders
- Takes gender into consideration during planning and risk analysis for data collection
- Captures and organizes data disaggregated by sex/age
- Ensures meaningful participation of women and girls in monitoring activities
- Co-designs monitoring activities with women and girl participants
- Ensures the use of monitoring tools that capture individual and experiential data
- Uses monitoring activities that are empowering in and of themselves
- Assesses the differential results for male and female beneficiaries of different ages
- Includes gender analysis of results and identifies gender-related drivers of change or lack of change
- Includes analysis of intersecting factors of identity
- Uses a combination of qualitative and quantitative methods to capture objectivity and subjective experience
- Evaluates the status and change of power dynamics between men and women/boys and girls (ie changes in *position*)
- Ensures that information sharing is equally accessible for male and female stakeholders
- Shares results that disaggregate by sex and age
- Generating results in collaboration and with input specifically from women and girls
- Assigns equal or greater priority to 'downward' accountability activities and participation in planning, monitoring, learning

11. Which type of indicator, qualitative or quantitative, do you think would be particularly important for measuring gender transformative change?

- Qualitative
- Quantitative

12. Gender sensitive indicators:

- Disaggregate by sex and age
- Disaggregate by other relevant factors of intersectionality
- Use language that describes in gendered detail the unit of analysis
- Use language that includes gender-related elements of the context
- All of the above



13. Using a feminist approach, interventions should primarily be accountability to whom?

- Donors/clients
- Government and taxpayers
- Community members
- The women's movement
- Individual women and girls