

Gender & Indicators

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What does a world without gender inequality look like? Realising this vision requires inspiring and mobilising social change. But what would indicate we are on the right track – and how will we know when we get there? Gender-sensitive indicators and other measurements of change are critical – for building the case for taking gender (in)equality seriously, for enabling better planning and actions, and for holding institutions accountable for their commitments on gender. This *In Brief* aims to stimulate thinking on these issues, starting with an overview article, followed by two very different case studies from the project and the international level. The first is an example of participatory monitoring from the innovative Swayamsiddha project in India, and the second examines the revisiting of the United Nations Development Programme's (UNDP) international Gender-related Development Indices (GDI) and Gender Empowerment Measure (GEM).

Gender and measurements of change: an overview

ANNALISE MOSER *independent gender and development specialist*

IN 2000, A GROUP of women in Andhra Pradesh, India, defined their visions of social change and worked out ways to measure that change. They drew pictures inside a circle to depict gender inequality: the pictures included girls working in cotton fields outside a school full of boys, and a woman begging for work from a landlord. In another circle, the women showed what the world would look like if gender equality became a reality: their pictures depicted girls going to school, and a man doing housework while his wife attends a meeting.

The women used these pictures to develop an action plan, but how could they tell if their desired changes were happening? To measure if

they were on the right track, they decided to note whether more women were agreeing to sign a pledge to send their daughters to school, for example. To tell if they were getting where they wanted to go, the women counted increases in the number of girls enrolled in school. These are all indicators used to measure change.

(Adapted from Menon-Sen, 2006)

Why measure change?

Because what gets measured is more likely to be addressed. By highlighting differences between how women and men fare, advocates can make the case for the urgent need to reduce gender inequality. Gender-sensitive measurements can

The 'hard figures' produced by quantitative methods are crucial to building the case for gender equality. Qualitative methods enable more in-depth examination of gender relations – such as how women negotiate safer sex.

help hold institutions accountable for their commitments on gender and be used to evaluate the outcomes of policies and interventions to enable better planning and actions.

In Chile, for example, women's civil society organisations successfully used gender-sensitive indicators – and poor performance against these – to lobby their government to fulfil its commitments on gender equality. Government programmes were changed – including the introduction of quotas to increase the amount of credit given to rural women.

The 'what' and 'how' of measurement

Many assume that measuring change is a technical exercise; yet the decision to measure progress towards gender equality is political. So too are the decisions about which aspects of gender equality to measure. Who should decide? Funders, programme staff, or – as in the innovative Swayamsiddha project (see article two) – the women and men who are intended to benefit? Whoever decides, the key guiding

Measuring gender mainstreaming

Local non-governmental organisations (NGOs) through to international agencies increasingly adopt a gender mainstreaming approach; the challenge is to develop indicators and tools to monitor compliance to gender mainstreaming commitments. Internal gender audits can help to gauge the level of gender sensitivity in organisations' policies, staffing, procedures and work culture. In an audit of the UK Department for International Development's (DFID) work in Malawi, staff were asked: 'Does DFID Malawi offer you enough opportunities to strengthen your knowledge of gender issues in your professional or technical area?' and 'How often do you integrate gender explicitly in your work?'

Measures of the impacts of gender mainstreaming programmes on beneficiaries are less common. These might include qualitative assessments, checklists or sex-disaggregated beneficiary assessments. A gender-sensitive budget initiative facilitated by UNDP in Mongolia

Organisations increasingly incorporate qualitative data into measurements of women's empowerment – to capture its multiple dimensions. The NGO CARE takes a cutting-edge approach to this – exploring what 'empowerment' means for women themselves, and including them in every step of the research process. On GBV, participatory researchers in Pakistan took steps to ensure that women felt comfortable answering questions about domestic violence, such as getting mother-in-laws to leave the room by politely asking for a glass of water.

International measurements

The most visible gender-sensitive indicators are at the national, regional and international levels. They are vital for enabling comparisons of gender equality across countries and regions through translating complex data into accessible messages about achievements and gaps. The focus on gender equality and women's empowerment in Millennium Development Goal (MDG) 3 is a milestone for decades of advocacy around the importance of gender equality to human development. Yet there is much debate on whether the current indices serve us well, with efforts to incorporate a broader set of indicators – on domestic violence and land ownership, for example. Limitations of UNDP's GDI and GEM have prompted a major review of existing measures (see article three).

Innovative initiatives are working to develop new indices which include a broader range of dimensions and indicators (such as Social Watch's Gender Equity Index). Other important developments include the adaptation of international indicators to better represent gender equality regionally (such as the African Gender and Development Index), initiatives to develop harmonised sets of gender indicators, and efforts to track donor and government commitments to gender equality in the context of the new aid architecture. Improving the production and dissemination of sex-disaggregated data is fundamental to achieving success

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questions are: What are the objectives and goals? What changes are required to achieve these? What indicators are best to measure progress towards these desired changes?

Next, consider what kind of data to collect and how. The 'hard figures' produced by quantitative methods are crucial to building the case for addressing gender disparities. Qualitative methods enable more in-depth examination of gender relations – such as how women and men negotiate safer sex. The ideal approach is a combination of qualitative and quantitative, which incorporates gender-sensitive participatory techniques, to help ensure that the topics of investigation are relevant to – and 'owned' by – the intended 'beneficiaries', such as the group of women in Andhra Pradesh.

analysed government expenditure and revenue to see how it benefited women as compared to men. This helped identify adjustments to policies and budgets for maximum impact.

Measuring the difficult to measure

Some aspects of gender (in)equality are difficult to define, such as the gender dimensions of poverty or women's empowerment, and some are sensitive issues such as gender-based violence (GBV) or occur in sensitive contexts like armed conflict – making them particularly difficult to measure. To capture the multi-faceted and gendered nature of poverty, indicators must move beyond income and consumption. Gender-sensitive participatory poverty assessments and 'time poverty' studies can help.

case for addressing gender disparities. v women and men negotiate safer sex.

in these initiatives.

Recommendations

- Sustain momentum on the revision and development of alternative international gender indices
- Support and strengthen national statistics offices to produce gender-sensitive data
- Consider how best to measure the gender aspects of multi-dimensional and sensitive issues and share examples of successful approaches
- Consider a combination of qualitative and quantitative methodologies to generate richer data
- Use participatory approaches wherever possible, including in defining gender-sensitive indicators
- Use gender-sensitive indicators to assess the outcomes and impacts of gender mainstreaming
- Make gender evaluations or internal audits mandatory and regularly undertaken

Gender-sensitive measurements alone do not improve gender equality. To realise positive change, findings must be documented, disseminated and used.

This article summarises the *Overview Report* on 'Gender and Indicators' by Annalise Moser (see back page of this bulletin for full details).

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Useful websites

International and regional databases of gender statistics:

The World Bank's GenderStats Database of Gender Statistics
<http://genderstats.worldbank.org>

United Nations Statistics and Indicators on Women and Men
<http://unstats.un.org/unsd/demographic/products/indwm/>

Organisation for Economic Co-operation and Development
Gender, Institutions and Development Data Base
http://www.oecd.org/document/23/0,2340,en_2649_33947_36225815_1_1_1_1,00.html

United Nations Economic Commission for Latin America and the Caribbean Gender Statistics (English and Spanish)
http://www.eclac.cl/mujer/proyectos/perfiles_en/default.htm (English)
<http://www.eclac.cl/mujer/proyectos/perfiles/default.htm> (Spanish)

United Nations Economic Commission for Europe's (UNECE) Gender Statistics Website
<http://www.unece.org/stats/gender/web/genpols.htm>

See also Siyanda: <http://www.siyanda.org> (search 'indicators')

Please note: all internet addresses are correct as of June 2007.

'WHAT ARE YOUR DREAMS for your daughter?', 'What qualities do you want to see in her?'. These questions were used by Swayamsiddha project teams to prompt women in rural India to identify their own empowerment goals and assess progress towards these goals. Starting in 2000, the five-year Swayamsiddha ('self-reliant women') project set out to improve the lives of women and girls in rural India and empower them to address their own development needs. The project was coordinated by us at the BAIF Development Research Foundation (BAIF), and was implemented by nine Indian non-governmental organisations (NGOs) in six states in India.

What changes were we trying to achieve?

Operating through community-based organisations (CBOs), Swayamsiddha worked with nearly 5000 women and over 1000 girls to expand their views of what was possible and build their capacity to make these changes.

From the outset, participatory monitoring and evaluation was integral to the project. To measure success, it was first necessary to decide on desired project outcomes. Central to this was a Community Needs Assessment where CBO members were asked about their needs. Questions prompted the participants – 'Why don't the girls go to school?', 'Which activity do women spend most of their time on?'. Women mainly expressed practical needs like access to healthcare and the means to earn a livelihood.

[Women and girls] talked of eating the remaining seeds and not having more to plant. They talked of dying during childbirth...of crops that were baking in drying fields, and of men who had migrated in search of work.

(IDRC/CRDI, 2005)

Once these problems were identified, Swayamsiddha teams worked with CBOs to address them – through improving access to clean water, promoting income-

: participatory monitoring in rural India

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A woman from a CBO in Maharashtra State, India, shows her account record for an income-generation project supported by Swayamsiddha. (BAIF/IDRC)

generating activities, supporting girls' education, and improving the availability of healthcare information.

How did we know we were on track?

The needs were incorporated into the project logframe – a framework presenting project goals, objectives and corresponding targets – and indicators were developed to track whether these goals were being achieved. We felt that it was vital that the indicators chosen went beyond mere increases or decreases in numbers. For example, initially we thought of using the indicator: *an increase in the number of girls enrolled in school*. But then we realised that enrolment does not necessarily ensure attendance, so we re-framed the indicator as *female community-based organisation (CBO) members sending all their daughters to school*. This enabled the project to monitor whether girls were being *encouraged* to attend school by their mothers – a sign of women's changing attitudes about the role of women and girls in society.

But there were tensions between the requirements of one of the funders and the needs of the project. The funder felt that the logframe was at odds with their reporting systems because of its focus on qualitative indicators. Ultimately, the project adopted two logframes: the

Swayamsiddha working logframe to guide the project, based on indicators generated by the community (such as community acceptance of non-traditional roles for women); and a reporting logframe focusing on quantitative indicators (such as the numbers of female CBO members regularly using labour-reducing technologies).

Measuring women's empowerment

In addition to ongoing project monitoring, two in-depth evaluation studies were carried out, including one on women's empowerment in November 2004 which sought to generate a better understanding of what the women attributed their empowerment to. Through interviews, women were asked: 'Who is the most empowered woman in the community?', 'What are the qualities that make her empowered?'. Sometimes women found it hard to think in this abstract manner, so instead we asked: 'What is it that you could not do but want your daughter to do?'. As part of the evaluation, focus groups were held with women CBO members to discuss whether they thought they had changed during the project. Group interviews were also held with the women's husbands to determine what changes they had observed and gauge how they felt about these changes.

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What changes took place?

For some women, merely attending a women's meeting or looking a visitor in the eye were significant achievements. Other women, however, were more ready to take on leadership roles in their communities. (IDRC/CRDI, 2005)

During the focus groups, women spoke about how they had changed. They reported that they can now express themselves with fewer inhibitions, a sentiment echoed by their husbands. Almost all women said that they wanted their daughters to have a different role in the community than they had – to take up jobs and not labour in the fields like them. By the project's completion at the end of 2005, 86 per cent of female CBO members were sending their daughters to school, compared to 63 per cent in 2001, and 95 per cent had accessed health information or services, compared to 66 per cent in 2001. CBOs had also become active in lobbying the government for services – and over half of these requests were successful.

What have we learnt?

What is important is the feeling that monitoring is being done because it is found useful and because the participants want to use it and not because it has to be done... (Bhirdikar et al, 2005: 58)

Too often, monitoring is seen as 'policing' by external people. Yet what the Swayamsiddha experience taught us was that when indicators and logframes are developed *from the ground up*, the results can be truly owned by the community. This is not only fundamental to project success, it is transformative in itself.

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Revisiting the GDI and GEM

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HUMAN DEVELOPMENT, if not engendered, is endangered' (*Human Development Report* 1995:1). This was the clear message of the 1995 *Human Development Report* which launched the Gender-related Development Index (GDI) and the Gender Empowerment Measure (GEM).

What do the GDI and the GEM aim to measure?

The GDI is a measure that adjusts the Human Development Index [HDI] [downwards for] gender inequalities in the three dimensions covered by the Human Development Index [HDI], i.e. life expectancy, education, and incomes. It is therefore important to note that the GDI is "not" a measure of gender inequality as such...

The GEM seeks to measure relative female representation in economic and political power. It thus considers gender gaps in political representation, in professional and management positions in the economy, and [levels of and gender gaps] in earned incomes. (*Klasen, 2006*)

The move to consider *gender gaps* in the assessment of human development was an innovative and timely step, coinciding with the landmark Beijing Platform for Action. But existing constraints have limited the potential of the indices, and a lack of understanding of these limitations has sometimes led to their misinterpretation. After ten years of using the measures, the Human Development Report Office (HDRO), in collaboration with UNDP's Gender Team, began a process to evaluate the impact of the GDI and GEM and suggest refinements or alternative measures.

Why revisit the GDI and GEM?

Initial stages of a review

Background papers were commissioned to provide the conceptual and technical basis for the review. An online discussion was also held to field a variety of opinions on whether to revisit and refine the indices; this involved UNDP staff in field offices and headquarters, and staff from other UN agencies, academia, government and NGOs.

Discussions were rich, and a broad range of issues were raised. One concern was the difficulty of reflecting the multiple dimensions of gender (in)equality using indices comprised of so few components. Participants suggested measuring additional dimensions – personal security and dignity, women's leisure time, advocacy for equality, and 'having choices'.

Participants also criticised the indices for failing to capture the realities of women's lives. For instance, a key dimension of the GEM is political participation and decision-making power, which is measured by women's and men's shares of parliamentary seats. Yet this measure does not reflect women's representation in local governance, where decisions may have far greater impact on the day-to-day lives of women and men.

Problems also arise from the fact that the indices are tied to the HDI. For example, the GDI adjusts the HDI by applying a penalty for gender inequality in the three dimensions, so a low GDI can occur either if the HDI is low, or if the HDI is high but the gender gaps are large. A poor country can therefore never have a really high GDI.

Recommendations for change

The insights generated from the papers and online discussion were debated at an expert meeting organised by the HDRO in 2006. Concrete suggestions emerged, ranging from short-term 'fixes' to a longer-term research agenda. These were published in the 2006 *Human Development Report*.

Short-term recommendations focus on reducing misinterpretations of the GDI and GEM, by providing clearer guidance on how the measures should be interpreted – and emphasising that the indices are not a measure of gender equality. One option in the longer-term is to replace the GDI with an alternative composite index (where several indicators are combined into one overall measure) of gender (in)equality. This might involve presenting *comparisons* of the achievements of women versus men in terms of life expectancy, education and income, to reveal gender gaps.

An alternative is to develop an entirely new composite 'female deprivation' measure, focusing on women, composed of dimensions such as violence against women. To take this forward, indicators – such as on physical security – must be developed which are robust to problems around definition and data collection. Equally urgent is the need to formulate indicators that reflect inequalities in disposable time and incomes.

Perhaps the greatest challenge in the long term is to develop a measure which focuses not only on *individual* outcomes such as literacy rates (like the GDI), but also incorporates variables that can measure the broader enabling environment for promoting gender equality in a country, such as legal and institutional frameworks.

The way forward?

Collectively these recommendations present us with a compelling set of proposals which would enable gender inequalities to be captured on a level never before possible. Yet without better comparative data we are hindered from translating these ideas into action. Progress is being made: there is incredible momentum building up around measuring change on a whole range of gender issues, from grassroots to international levels. It is vital that we draw inspiration from and build on these exciting initiatives, generating more and better data, to make the case for action indisputable.

Thanks to Stephan Klasen and Tim Scott for their valuable input into this article.

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