

Handbook for the Integration of a Gender Perspective in the Education Sector

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Gender Equality and Development Cooperation:

Basic Questions

What is meant by "gender"?

The term *gender* refers to the economic, social and cultural attributes and opportunities associated with being male and female. In most societies, being a man or a woman means not only having different biological characteristics, but facing different expectations about the appearance, qualities, behaviour and work appropriate to being male or female. Relations between women and men -- whether in the family, the workplace or the public sphere -- also reflect understandings of the talents, characteristics and behaviour appropriate to women and men. *Gender* thus differs from *sex* in that it is social and cultural in nature rather than biological. Gender attributes and characteristics vary among societies and change over time.

Why is gender a development issue?

From a development perspective, gender is important not only because of *differences between women and men in what they do*, but also because of *inequality between women and men*. Women's personal autonomy is more limited than men's; women have less access to economic resources; and women are systematically under-represented in decision-making processes that shape their societies and their own lives. There are differences among women (and among men) in interests and needs, as factors other than gender influence social identity. Nevertheless, there are clear patterns of lesser access by women to resources, opportunities and decision-making. This pattern of inequality is a constraint on development because it limits the ability of women to develop and exercise their full capabilities, for their own benefit and that of society as a whole.

What is meant by "gender equality"?

Gender equality, or *equality between women and men*, consists of equal enjoyment by women and men of socially-valued goods, opportunities, resources and rewards. As what is valued differs among societies, a crucial aspect of equality is the *empowerment of women* to influence what is valued and to share decision-making about societal priorities and development directions. Equality will not mean that men and women become the same but that their opportunities and life chances will not depend on their sex.

Why do gender strategies focus on women?

Organisations such as Sida and many partner countries have formulated gender equality policies and strategies precisely because gender equality does not exist. Since it is *women* who are generally excluded or disadvantaged in relation to social and economic resources and decision-making, efforts to identify and redress imbalances have focused on

women's situation and women's views. But it is increasingly recognised that strategies must focus on men as well as women, and on the relations between men and women, in order to achieve real change.

Don't men have gender too?

Gender is often overlooked as an aspect of men's social identity. This stems from a tendency to consider male characteristics and attributes as the norm, with those of women being a variation. But the lives and activities of men are strongly influenced by gender. In most societies, men tend to have broader options, more opportunities and greater access to society's resources than women. This is the result of a framework of legislation, policies, and institutions that incorporate attitudes and practices about what is appropriate to being male and female in a given society. Cultural norms and practices about "masculinity" and expectations of men as leaders, husbands, sons and lovers -- in other words, gender -- are important in shaping the demands on men and their behaviour. In many societies, they mean that men are expected to bear arms and fight in defense of the nation or community. They shape the expectation that men will concentrate on the material needs of their families, rather than the nurturing and care relationship assigned to women. There are thus disadvantages and costs to men in patterns of gender difference.

What is the role of men in achieving gender equality?

The achievement of equality implies changes for both men and women. More equal relationships will need to be based on a redefinition of the rights and responsibilities of women and men in all spheres, including the family, the workplace and society at large. One of the challenges in moving forward will be to motivate more men to participate as partners in the process of defining the visions and strategies for a more gender-equal society.

Is equal treatment of women and men a sufficient strategy for gender equality?

Equal treatment and equal opportunities for women and men is an important goal. This is often interpreted to mean equal numbers of women and men participating in a programme or initiative. However, a lesson from experience is that equal participation at this level is not always the most relevant or effective means of ensuring that an initiative supports the achievement of equality. Equality strategies are incorporating this lesson in two related ways:

- ▷ *focusing on impact rather than activities/inputs* -- looking at how the overall initiative will affect women and men and gender equality, either directly or indirectly;
- ▷ *focusing on equality as an objective rather than on women as a target group* -- considering how to select and design initiatives that can support equality as an objective, which may include, for example, changes in institutional practices, legislation, and

planning methodologies, and include both men and women.

Mainstreaming as a strategy for gender equality

The strategy adopted by the world community at the UN Fourth World Conference on Women (1995) is *mainstreaming*. The *Platform for Action* emphasised two aspects of a mainstreaming strategy:

- ▷ Equitable distribution of the resources, opportunities and benefits of the mainstream development process. This requires the integration of equality concerns into the analyses and formulation of policies, programmes and projects, with the objective of ensuring that these have a positive impact on women and reduce gender disparities.
- ▷ The inclusion of the interests, needs, experiences and visions of women in the definition of development approaches, policies and programmes and in determining the overall development agenda. This requires strategies to enable women to formulate and express their views and participate in decision-making across all development issues.

A mainstreaming strategy does not preclude initiatives specifically directed toward women or toward equality between women and men. Such positive initiatives are necessary and complementary to a mainstreaming strategy.

Overview: Gender Equality and Education

This overview is a starting point for consideration of gender equality in relation to education and the education sector. It does not aim to be comprehensive but to suggest ways in which gender-based inequalities are relevant to issues and interventions in the sector.

1.0 Why or how is gender equality relevant to education?

"...education is a fundamental right for all people, women and men, of all ages, throughout the world."

World Declaration on Education for All (Jomtien, 1990).

"Education is empowerment. It is the key to establishing and reinforcing democracy, to development which is both sustainable and humane and to peace founded upon mutual respect and social justice.... The right to education is nothing less than the right to participate in the life of the modern world."

Amman Affirmation (Mid-Decade Meeting of the International Consultative Forum on Education for All, June 1996).

*Education
is a
basic right...*

The above statements emphasise that education is a basic human right in itself and also critical to the ability to exercise other rights. Education enables individuals to participate in social, economic and political life and is a foundation for the development of society as a whole. The benefits of education thus accrue both to individuals and to nations and the overall development process. Clearly these considerations apply to women as well as men.

*...that women
do not enjoy
to the same extent
as men*

However, additional international commitments specifically focused on the education of women and girls indicate that specific measures are required to ensure equal access to education and the benefits it confers. Despite gains in the last two decades, there are significant gender disparities in literacy rates, enrolment rates, educational attainment, distribution across subject specialties, and most other educational indicators. Recent international statements have emphasised the importance of investing in the education of girls and women as a means to enhance women's quality of life, employment and income prospects and participation in social and democratic life. Arguments have also been made that the education of girls and women is important because it is associated with improved health, higher productivity and reduced fertility.

Participation by girls is important...

...and so are the values about women and men taught to both girls and boys

Gender inequalities in education reflect and reinforce gender inequalities in society

Access is not only about places, but also...

Access to schooling has been the focus of attention in many strategies for gender equality in education. This is a critical issue that requires continuing attention, as suggested by the gender disparities referred to above. Achieving education for all will require a special focus on girls and women. Another aspect of importance that has received less attention is the extent to which the education system supports the goal of gender equality through curriculum and teaching practices. Education plays a major role in socialisation and the transmission of norms and values. It can have a significant influence -- either positive or negative -- in attitudes about gender equality and the equal partnership of women and men within the family, the community, employment and the public life of the nation.

Both types of gender equality issues -- differences between the numbers of girls and boys who gain an education, and the attitudes toward women and gender equality promulgated by curriculum and teachers -- arise because of factors that are external as well as internal to the education sector. The gender-based inequalities that exist in society also influence institutions, attitudes and practices in the education system. Full solutions to the problems associated with gender inequality do not lie within the education sector, or any other single sector. However, the education sector does have the potential to have a major impact on the life prospects of girls and women and on the acceptance of gender equality as a fundamental social value.

The following three sections provide a brief outline of the ways in which gender affects educational opportunities and outcomes.

1.1 Gender and who goes to school

Gender is a significant factor in determining who is in school. The lower participation rates of girls in most regions of the world result from a complex mix of both supply and demand factors -- the availability of places is one factor, but various cultural and practical factors related to the overall environment and the terms on which schooling is provided also affect the proportion of girls in schools. It is important to emphasise that the specific situation and influencing factors differ considerably among different countries and local areas.

Some of the factors that may result in lower participation by girls are outlined below.

- **Opportunity costs** -- One cost of going to school is the contribution that girls would otherwise make to the family. This could include caring for younger children, household chores such as cooking or obtaining water and fuel, or contributions from income-earning activities. The heavy workloads of women often result in demands

*...other
contributions
foregone*

on daughters that may keep them from entering school or affect their attendance and performance. Boys also contribute to family welfare, but there is some evidence to suggest that girls contribute more and thus the opportunity costs of their education are higher.

*...expectations of
benefits to
families or girls*

- ▶ **Perceived benefits** -- If girls are seen to gain fewer benefits than boys from education, this may influence the decision to send them to school. Various factors can influence this equation:
 - ▶ families may actually gain less from the education of daughters than sons when daughters marry out of the family;
 - ▶ parents may not see that education increases the skills and abilities of girls as mothers or wives or farmers;
 - ▶ the employment and income prospects for girls as a result of schooling may actually be less than that for boys, particularly where skill training of girls focuses on traditionally-female, low-paid occupations.

*...the situation in
which girls will be
placed*

- ▶ **Cultural norms** -- Depending on the region and the context, standards of propriety may require that girls be separated from boys and men in classrooms and may generally limit the mobility of girls. The lack of separate schools for girls or of sufficient separation from boys, or the lack of female teachers, or schools that are too far from home, may function as barriers to participation by girls.
- ▶ **Safety** -- Sexual harassment of girl students (and female teachers) is frequently noted as a problem. This may heighten parental concerns about security and safety of their daughters and thus affect decisions to place daughters in school; it clearly also has a deleterious effect on the learning environment for girls in school.

*...what the school
system provides*

- ▶ **Quality of education** -- The quality of instruction, class sizes, physical facilities, and the availability of materials all affect the quality of education for both girls and boys. Differences may arise where separate schools for girls receive fewer resources than those for boys; more subtle differences may arise if scarce educational materials and teacher time in co-educational schools is not equitably distributed between girls and boys. Some observers have noted that the quality of schooling influences parental decisions to send children to school, and possibly influences decisions about girls more than boys when combined with the factors above.

*...the financial
burden*

- ▶ **Direct costs** -- The direct costs of schooling can include fees, books, supplies, clothing and transportation, which can reach a significant total, particularly for poor families. While direct costs may be similar for girls and boys, these direct costs in combination

with the factors above may have a greater impact on the decision to send girls to school.

A useful review of experience with different initiatives to increase the participation of girls is provided by R.T. Bellew and E.M. King in "Educating Women: Lessons from Experience" (*Women's Education in Developing Countries: Barriers, Benefits and Policies*, E.M. King and M. A. Hall (eds), published by Johns Hopkins University Press for the World Bank, 1993).

In summing-up what can be learned from a number of initiatives to increase number of school places, this study states that: *"These experiences demonstrate that simply expanding education programs may be insufficient to increase female enrolment. For programs to be fully utilised, the demand for education must emanate from families and the community. When parents are concerned about the physical and moral safety of their daughters, when the direct and opportunity costs of attendance are too high, and when the benefits of an education are too few, school expansion policies will be effective only if they are accompanied by policies that lower the cultural, direct, or opportunity costs of education or raise the benefits."* (p.291).

1.2 Gender equality and what is learned at school

The extent to which education nurtures values about equality between girls and boys, women and men is also an important aspect of the issue of gender equality in education.

There are many ways in which gender inequalities in society may be recreated or reinforced through the educational systems. This includes:

- ▶ **Stereotyped images in textbooks and educational materials** -- An emphasis in images of girls and women on "typically female" activities and occupations, the omission of images of men in household and child care activities, and the omission of images of women in "typically male" activities and public life, can have an influence in shaping the ideas of both girls and boys about what is possible and appropriate for women and men.
- ▶ **Curriculum, textbooks and educational materials that take gender inequalities for granted** -- Where this is the case, major opportunities are missed to inform students of human rights and women's rights that exist in law in their country, and to enable them to reflect on social issues that will affect them. This type of

Curriculum, textbooks, and teaching practices are important to gender equality goals...

*...as they can
serve to support
or undermine
gender equality
goals*

information, discussion and reflection is an important aspect of the empowering possibilities of education.

- ▶ **Structure of courses open to girls or boys** -- The allocation of boys and girls to different classes and subject matter (such as cooking, sewing and household maintenance for girls, and agriculture, and industrial arts for boys) shapes ideas about appropriate roles for each gender as well as the actual skills that boys and girls gain.
- ▶ **Streaming by teachers and counsellors** -- The perceptions of both girls and boys about what is possible and appropriate to being male or female can also be influenced by limited enthusiasm among teachers and counsellors for girls' participation in "male" subjects such as science and technology, or an emphasis on directing girls into vocational training in female-dominated areas. This can also result in girls and boys leaving school with different sets of skills. In this way, gender differences are reinforced.

"There is also a need to gain a greater understanding of the power and a function of curricula.... Often, gender-sensitive curricula are defined as those that increase the portrayal of female role models in textbooks and present women in wide range of occupations -- including those in scientific fields and agriculture. But a gender-sensitive curriculum is also one that depicts men in family- and child-related activities; that through argument (and not just images) calls into question accepted definitions of 'femininity' and 'masculinity'; that opens for discussion issues such as domestic violence, unequal remuneration, and sex education; and that offers knowledge to girls and women that enables them to better understand their reality and perceive strategies for altering it, and in that way is self-affirming and empowering."

N. P. Stromquist, *Gender and Basic Education in International Development Cooperation*, UNICEF Staff Working Papers Number 13, 1994, p.98. (Study commissioned jointly by UNICEF and Sida.)

1.3 Education, gender equality and social change

The education system of course does not exist in isolation from the society in which it is located. Inequalities that exist in society affect the structure and management of the education system, the attitudes and practices of teachers, the content of curriculum and teaching materials. In many

Society influences education

regions, families have different concerns about their daughters and sons when deciding who to send to school. And the girls who achieve an education still face numerous barriers constraining the "right to participate in the modern world," including discrimination by employers, less access than men to productive resources, and male-dominance in decision-making in private and public spheres.

...and education influences the possibilities of change

It is thus a major challenge to achieve an education system that is able to extend equal opportunities to girls and to promote gender equality. While education systems can contribute to the achievement of gender equality, change will not be achieved through education alone. But the education system has a particularly important role not only in providing girls as well as boys with knowledge and skills, but in shaping attitudes and conditions for the future. Boys and girls who emerge from a school system that values equality between males and females are more likely to apply these values as employers, co-workers, teachers and parents.

*"In general, women have been more successful in overcoming cultural barriers to **building** their capacities than in overcoming the barriers to using these capacities."*

"...experience shows that providing education is necessary but not sufficient for women's empowerment. More has to be done to open opportunities for women to use the capabilities they are acquiring."

UNDP, *Human Development Report*, 1995, p.33, 34.

2.0 Planning with partners in the context of the Beijing Platform for Action

Both national governments and development cooperation agencies have undertaken broad commitments to the education of girls and women and to gender equality in adopting the Beijing *Platform for Action* and agreements reached at other recent international forums.

The Beijing *Platform for Action* includes five strategic objectives related to education and proposals for action in relation to each. The strategic objectives are:

The Beijing PFA sets out five strategic objectives for education...

- ▶ Ensure equal access to education.
- ▶ Eradicate illiteracy among women.

- ▶ Improve women's access to vocational training, science and technology and continuing education.
- ▶ Develop non-discriminatory education and training.
- ▶ Allocate sufficient resources for and monitor the implementation of education reforms.

The *Platform for Action* also commits governments and their development partners to systematic and ongoing attention to gender equality issues in educational policy, planning and decision-making. It states that:

...and a general commitment to mainstreaming a gender perspective in education policy and planning

"In addressing unequal access to and inadequate educational opportunities, Governments and other actors should promote an active and visible policy of mainstreaming a gender perspective into all policies and programmes, so that, before decisions are taken, an analysis is made of the effects on women and men, respectively." (Para. 79.)

As both Sweden and the national governments with which it cooperates are party to these agreements, there is a firm basis on which to undertake joint efforts to address gender disparities and promote gender equality in the education sector. Policy dialogue is an important element in the process of establishing common ground for joint efforts. Starting points for policy dialogue in this area include:

Starting points for policy dialogue on gender equality:

- ▶ the general commitments made by a partner government in international agreements;
- ▶ the priorities for action in implementing those commitments identified by authorities in the education sector;
- ▶ concerns and issues about gender equality in education in the country identified by women's advocacy organisations, academics, and/or experts on gender equality in education (all of whom can make valuable contributions to the process of policy dialogue).

Policy dialogue is a means by which development cooperation agencies advance major policy concerns and assess the room for manoeuvre in addressing them. National partners undoubtedly use policy dialogue for the same purpose. In this process, it is important that Sida is able to *demonstrate* that the issue of gender equality in education is a broad and significant concern. Important elements in this might include:

- ▶ the ability to discuss gender equality issues as relevant to various items on the policy agenda, and not only in relation to agenda items that focus on women's education;

Demonstrating through action that gender equality is a development goal:

- ▶ consistently addressing gender equality concerns in analyses of sectoral problems, policies, institutions, and potential reforms;
- ▶ willingness to experiment and be flexible in implementing strategies, and to inject additional resources for research, evaluation and reflection on their success;
- ▶ some humility about the knowledge and achievements in industrialised countries in addressing gender inequalities in education.

The four sections below outline various types of issues that can be considered in working with partners in the education sector and in supporting them to mainstream gender equality throughout the sector.

2.1 Educational policy, planning and management

Issues in education policy and management include:

Unless initiatives in support of gender equality are integrated into national educational policy, planning and management processes, they are likely to take the form of isolated short-term efforts with limited impact on the overall education system. Some of the challenges facing national governments in incorporating gender equality goals in educational policy, planning and management are outlined below.

...explicit objectives about gender equality

- ▶ **Sectoral policy objectives** -- It is unlikely that consistent and coordinated policy and programme approaches in support of gender equality in education will emerge unless gender equality is explicitly recognised as one of the overall sectoral policy objectives set out to guide planning and management in the sector.

...the ability to address gender inequality in planning

- ▶ **Capacity for policy analysis and planning** -- An important aspect of overall institutional capacity (as emphasised through the *Beijing Platform for Action*) is the capacity to analyse problems, policies, and reforms from a gender-equality perspective and to formulate approaches that make positive contributions to gender equality. Capacity in this regard includes general understanding and commitment to gender equality goals, awareness of data and information available, skills in the analysis of such data, and the ability to relate such data or information to policies and programmes to assess their implications for gender equality goals.
- ▶ **Priorities in sectoral allocations and investments** -- How resources are allocated among education sub-sectors, and particularly the proportion allocated to basic education, is relevant to gender equality goals. In many areas, the lack of sufficient

...the impact by gender of educational investments

places in primary school militates against equal access for girls. In addition, the quality of education at the primary level is particularly important for girls because they tend to have fewer years of schooling than boys. Where allocations to the primary education sector need to be supplemented by school fees paid by parents or community contributions, which may undermine the ability or willingness of families to invest in the education of their daughters, even lower enrolment ratios may result.

...information to identify problems and monitor progress

- ▶ **Data and information systems** -- Adequate data is essential to monitor problems, changes and achievements. Gender disparities in education mean that adequate data, by definition, is disaggregated by sex on key variables such as enrolment, drop-out, repetition and achievement. This may require the modification of the administrative data systems or periodic surveys that are data sources in the sector.

...learning from experience

- ▶ **Research and evaluation** -- The identification of cost-effective strategies for increasing the participation of girls in schooling will require further research on the constraints confronting girls and careful evaluations of pilot and innovative measures to determine whether they worked and why. Stretched education budgets increase the necessity of identifying what works in what context in order for effective action to be taken to increase girls' participation.

...women's participation in decision-making

- ▶ **Representation of women in educational policy, planning and management** -- The representation of women in policy and decision-making positions is an issue that is related to equal opportunities in employment, but also to equal participation by women and men in decisions that shape institutions and the programmes through which opportunities and services are made available to the public.

2.2 Teacher training

Teacher training is an important means of upgrading teaching skills and of promoting improvements in the quality of education. It is also a major means of reaching teachers on gender equality issues and of equipping them to use educational materials to support gender equality. Some of the issues in this area are:

Providing teachers with

- ▶ **awareness of inequalities** between women and men, of national commitments to closing these gaps, of the rights of women that exist in national legislation, and of what is expected of teachers with respect to the information transmitted and the values taught in this

knowledge and skills

area;

- ▶ **guidance in how to deliver curriculum** and use educational materials to promote an understanding of girls and boys, women and men as individuals with equal rights and equal potential;
- ▶ **awareness of teaching practices that can undermine these values**, such as the lack of encouragement of girls by comparison to boys, allowing inequalities in use of scarce educational materials, tolerance of sexual harassment, etc.

...will require capacity-building in teacher training institutes

If teacher training is to achieve the above, attention will need to be directed to the development of capacity of pre-service and in-service training institutes on gender equality issues. This could include:

- ▶ **curricula and educational materials for teacher training** that includes components on the above concerns;
- ▶ **skills development on the part of teacher trainers** in delivering this curricula and using these materials.

2.3 Curriculum development and educational materials

The curriculum and educational materials that teachers use in the classroom are also important. Issues here include:

- ▶ **Review of curriculum and educational materials for a gender equality perspective** -- to assess whether these make a positive contribution to gender equality by raising issues about existing inequalities and promoting consideration of alternatives.
- ▶ **Specific materials on human rights and gender equality** -- the issue of gender equality seems to have received less attention than others such as environment and HIV/AIDS as a thematic concern for the development of special modules or teaching materials for use in schools.
- ▶ **Teacher guides** -- Teacher guides on how to deliver curriculum and educational materials so as to promote gender equality may be important means of enabling them to do so.

Ensuring that teaching materials support gender equality...

Attention to gender equality issues in curriculum and educational materials is an on-going rather than a one-shot process, as new curriculum, textbooks and other educational materials continue to be developed. This implies the

*...will also
require capacity
development*

need for capacity on gender equality issues in the institutions that develop curriculum and the institutions that commission or approve texts and educational materials. Issues here include:

- ▶ **formulation of basic guidelines** -- at least a brief and basic statement about what to aim for and what to avoid will be required to guide authors and reviewers of curriculum and educational materials.
- ▶ **skills development about such guidelines** -- to enable officials to commission materials and review them effectively.

2.4 Specific measures to increase girls' participation

*Specific measures
for girls'
participation
need to...*

Various types of strategies have been employed to increase the participation of girls in basic education. One review that attempted to draw the lessons from experience with different strategies in various areas of the world found that few clear conclusions could be drawn because of the limited data on these initiatives and the general lack of rigorous evaluation. The quotations from this study below provide an indication of the range of initiatives that have been employed and a brief summary of what can be concluded from experience. Two points deserve emphasis:

*...suit the
local context*

- ▶ strategies to support the education of females and to close the gender gap need to be formulated with close attention to the particular national or local context, as the nature of gender disparity in education and the specific constraints faced by girls and women can vary widely.

*...and be
carefully
assessed*

- ▶ initiatives taken need to be carefully documented and assessed in order to determine what works under what conditions and to be able to identify cost-effective strategies for wider application.

*Lessons
from experience*

"... even where data are available, most initiatives have not been evaluated rigorously enough to permit strong conclusions about their effectiveness. At this time, striving to advance women's education often means proceeding with best guesses, guided by what has worked well under similar circumstances or by what theoretically might work. Experimentation and careful monitoring are essential. No simple or uniform prescriptions are possible. How governments, communities and donors approach the challenge of closing the gender gap in education must depend on the specific context, including the existing supply of schools, the quality of education, prevailing cultural and social norms, families' incomes and productive activities, and women's opportunities for paid work." (p.286.)

.....

"Notwithstanding the absence of sound evaluations, our review does show that some strategies have been effective, some have failed, and some have yielded mixed results. For others, no evidence exists to confirm or dispute their effectiveness.... Parents have responded positively to monetary incentives in the form of scholarships. They have also been influenced by the availability of culturally appropriate facilities and of female teachers when cultural norms make this important. Alternative schools have proved attractive to girls who missed the chance to attend regular primary school or whose work schedules conflict with the regular school day. Improving the quality of schools and training for women in occupations in growth sectors of the economy -- when combined with strong recruitment and placement efforts -- also appear to be promising strategies. But distributing free uniforms and providing vocational training not directly linked to employment and with little if any effort at recruitment have not yielded the expected results.

"Little information is available by which to judge the effectiveness of programmed learning, revamped curricula and textbooks that introduce broader roles for females, home technologies, day-care, school feeding programmes, and information campaigns. More experiments are necessary before it will be possible to identify the circumstances under which these initiatives can benefit girls and women. Expanding school places is an inadequate strategy when the cultural or monetary costs are too high or the benefits too few." (pp. 315-316.)

R.T. Bellew and E.M. King, "Educating Women: Lessons from Experience", in *Women's Education in Developing Countries: Barriers, Benefits and Policies*, E.M. King and M. A. Hall (eds), published by Johns Hopkins University Press for the World Bank, 1993.

3.0 Strategies for gender equality

In summary, there are two major dimensions to strategies for mainstreaming gender equality in education:

*Two dimensions
of strategies for
equality:*

- ▶ seeking means to close the disparities between girls and boys in gaining access to education, in years of education, and in skills obtained; and
- ▶ seeking to ensure that the education system fosters understanding and support by both boys and girls of equality between women and men and an equal partnership within the family, the community, the workplace and the public life of the nation.

Sida documents on gender equality and education:

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Mabala, Richard S. (1995). *Integration of a gender perspective into Sida supported activities in the vocational training and education sectors. An evaluation*. Prepared for Embassy of Sweden, Development Cooperation Division, Tanzania.

Mbilinyi, Marjorie and Patricia Mbughuni (eds) (1991). *Education in Tanzania with a Gender Perspective. Summary Report*. Sida, Education Division Documents No. 53.

Stromquist, Nelly P. (1994). *Gender and Basic Education in International Development Cooperation*. UNICEF Staff Working Papers Number 13, UNICEF, New York. [Commissioned jointly by UNICEF and Sida.]

Other useful resources:

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Hertz, Barbara, K. Subbarao and Laura Raney (1991). *Letting Girls Learn: Promising Approaches in Primary and Secondary Education*. Discussion Paper No.133. Washington, C.C.: World Bank.

IWRAW (International Women's Rights Action Watch) (1993). *Education for Participation. A Resource Guide on Women's Education and Participation in Public Life*. University of Minnesota, Hubert H. Humphrey Institute of Public Affairs. [Available from IWRAW, Humphrey Institute, 301-19th Avenue South, Minneapolis, Minnesota, 55455, USA.]

Jongepier, Maaïke and Marguérite Appel (1995). "A critical review of education and training." In **Advancing women's status: women and men together?** Critical Review and Annotated Bibliographies Series, Royal Tropical Institute (KIT), Amsterdam, The Netherlands. [Available through Women,Ink.]

The rationale for taking a gender perspective in the education sector: some talking points

The rationale from the perspective of development effectiveness:

Development processes and society are strengthened if women are able to develop their full capacities:

Women represent half the human resources and half the potential of every society. Barriers to the education of women and girls result in further constraints on their ability to participate fully in economic, social and political life, at a cost to themselves but also the wider community.

Policies and programmes that equip women with knowledge and skills are critical in addressing problems of poverty and low productivity:

Basic education, further and vocational education are all important in providing individuals with the tools to achieve more secure livelihoods and stronger local and national economies. The high risk of poverty among women in most countries means that attention must be directed to the particular barriers they face. This will require not only getting women into the education system, but also ensuring that they participate equitably in education programmes that provide them with marketable skills and access to growth areas of the economy.

The education of girls and women brings high social returns and supports other goals:
Education for women has also been associated with improved health, lower infant mortality, and reduced fertility.

The rationale from the perspective of social justice:

Education is a basic human right:

The right of girls and women to education has been reaffirmed in countless international agreements to which both Sweden and partner countries are parties.

Education is key to women's empowerment and their ability to exercise other rights:

Education is important to enabling women to participate effectively in social, economic and political life.

Equitable development implies that women receive a fair share of development resources:

The resources, services and opportunities available through national and external development initiatives must be equitably distributed between women and men for these processes to be regarded as equitable.

Equitable development is concerned with reducing disparities between different social groups:

In most countries, women's rates of literacy, educational enrolment and educational achievement are significantly lower than those of men. Education sector policy and programmes offer opportunities to promote more equal gender relations -- in addition to increasing access by girls, this can include improvements in the quality of education and the learning environment in support of participation and performance by girls, and the development of curriculum and teaching materials that support more equal relations.

Key Citations

Platform for Action, Fourth World Conference on Women, Beijing, September 1995, para. 69:

Education is a human right and an essential tool for achieving the goals of equality, development and peace. Non-discriminatory education benefits both girls and boys and thus ultimately contributes to more equal relationships between women and men. Equality of access to and attainment of educational qualifications is necessary if women are to become agents of change. Literacy of women is an important key to improving health, nutrition and education in the family and to empowering women to participate in decision-making in society. Investing in formal and non-formal education and training for girls and women, with its exceptionally high social and economic return, has proved to be one of the best means of achieving sustainable development and economic growth that is both sustained and sustainable.

Platform for Action, Fourth World Conference on Women, Beijing, September 1995, Strategic objectives related to education (paras. 80-88):

1. Ensure equal access to education.
2. Eradicate illiteracy among women.
3. Improve women's access to vocational training, science and technology, and continuing education.
4. Develop non-discriminatory education and training.
5. Allocate sufficient resources for and monitor the implementation of educational reforms.

Platform for Action, Fourth World Conference on Women, Beijing, September 1995, para. 72:

Creation of an educational and social environment, in which women and men, girls and boys, are treated equally and encouraged to achieve their full potential, respecting their freedom of thought, conscience, religion and belief, and where educational resources promote non-stereotyped images of women and men, would be effective in the elimination of the causes of discrimination against women and inequalities between women and men.

Platform for Action, Fourth World Conference on Women, Beijing, September 1995, para. 79:

In addressing unequal access to and inadequate educational opportunities, Government and other actors should promote an active and visible policy of mainstreaming a gender perspective into all policies and programmes, so that, before decisions are taken, an analysis is made of the effects for women and men, respectively.

World Declaration on Education for All (EFA), Jomtien, 1990, Article 3 (Universalizing Access and Promoting Equity), para.3:

The most urgent priority is to ensure access to, and improve the quality of, education for girls and women, and to remove every obstacle that hampers their active participation. All gender stereotyping in education should be eliminated.

Amman Affirmation (Mid-Decade Meeting of the International Consultative Forum on Education for All), Amman, 1996

The priority of priorities must continue to be the education of women and girls. Successful means of action in this critical area must be identified and developed. There can be no enduring success in basic education in countries where gender continues to be an obstacle to EFA.

United Nations Convention on the Elimination of All Forms of Discrimination Against Women, Article 10:

States Parties shall take all appropriate measures to eliminate discrimination against women in order to ensure to them equal rights with men in the field of education and in particular to ensure, on a basis of equality of men and women:

- a) The same conditions for career and vocational guidance, for access to studies and for the achievement of diplomas in educational establishments of all categories in rural as well as in urban areas; this equality shall be ensured in pre-school, general, technical, professional and higher technical education, as well as in all types of vocational training;
- b) Access to the same curricula, the same examinations, teaching staff with qualifications of the same standard and school premises and equipment of the same quality;
- c) The elimination of any stereotyped concept of the roles of men and women at all levels and in all forms of education by encouraging coeducation and other types of education which will help to achieve this aim and, in particular, by revision of textbooks and school programmes and the adaptation of teaching methods;
- e) The same opportunities for access to programmes of continuing education, including adult and functional literacy programmes, particularly those aimed at reducing, at the earliest possible time, any gap in education existing between men and women;
- f) The reduction of female drop-out rates and the organisation of programmes for girls and women who have left school prematurely;
- g) The same opportunities to participate actively in sports and physical education;
- h) Access to specific educational information to help ensure the health and well-being of families, including information and advice on family planning.

How to use the tables

What are these Tables?

These Tables are a reference tool to assist staff to mainstream a gender equality perspective in the Education sector. They build on Sida's work to date and incorporate insights from the work of other development cooperation agencies, academic research and international agreements (such as the Beijing *Platform for Action*). The Tables and the questions they contain are meant to stimulate thinking and to promote discussion. **Not all questions are relevant at all times.**

Why have they been prepared?

The Tables (and the Handbook as a whole) have been prepared in response to requests from staff for further assistance in applying a gender equality perspective in specific sectors and at different stages of the programme cycle.

Who should use them?

The Tables can be used by Sida staff at headquarters and country offices. Some of Sida's partners (government ministries, implementing agencies and contractors) might also find them useful, particularly as a means to understand Sida's approach to gender equality.

When are they useful?

The four sections in the Tables (**sector analysis, project formulation/appraisal, annual review, and evaluation**) can be used at corresponding stages of the programming cycle.

These four sections are complemented by the other chapters of the Handbook. The introductory section, **Gender Equality and Development Cooperation: Basic Questions**, provides a brief review of basic concepts and strategies such as "gender", "gender equality", "mainstreaming" and the role of men.

The **Overview: Gender Equality and Education** provides an introduction to the ways in which gender equality is relevant in the education sector and illustrates the types of insights gained through the application of a gender perspective.

The **Talking Points** summarise arguments that support the consideration of gender equality issues and objectives in education programming. The Talking Points are accompanied by **Key Citations** from international agreements that can be used in policy dialogue.

How might they be used?

The Tables are designed to be working documents. They do not provide a set recipe to be followed at all times. They are designed to raise issues and promote creative thinking. It may be useful for staff to review specific sections from time to time, rather than to attempt to work through the full set of Tables in one sitting.

Tables An Explanation of the Guidelines Structure

This column contains questions for Sida staff to ask themselves (WHAT?)

This column explains why these questions are relevant and important (SO WHAT?)

This column provides advice on what to do with the answers to the questions in the first column (NOW WHAT?)

Sector Analysis	Why ask these questions?	What steps can you take?
Initial questions for Sida staff: Does the analysis focus on the needs and wishes of the population in relation to health and health services? Does the analysis of the country situation assessed health status problems and needs by social groups and by gender? Consider for example: - Is the analysis of health status and health problems (of both adults and children) based on gender-differentiated data, for example information for men and women? - Is there such data on, for example, the incidence of malnutrition, infectious diseases, malaria, STDs and HIV/AIDS? Is there adequate information on maternal mortality and morbidity? - Does the analysis assess differences by gender in use of health services? Are there differences in the number of boys and girls taken to health centres for immunisation, or treatment of malnutrition? Or in the number of women and men seeking treatment for malaria or infectious diseases? - Does the analysis take account of socio-economic and cultural influences on health status and access to health services? Does any particular discrimination to the health of women, such as female genital mutilation or forced marriage, become a risk factor? Has attention been given to the incidence of physical and sexual violence against women and the health implications? - Have considerations about access and priorities included both women and men?	The health status problems and needs of women and men differ because of socio-economic and cultural factors as well as biology. Men and women also take on different gender assigned roles in health related activities at the household and community levels. Gender based differences and gender-specific needs and priorities can be addressed more effectively if they are taken into consideration at the beginning of programme planning. The sector analysis provides the basis for addressing programme emphasis and priorities. It is the role of a critical stage for raising questions to ensure that an overall outcome is available for planning purposes.	Sida may need to expand its network and information base on gender issues in the health sector by, for example: - undertaking specific studies - consulting with women's organisations and NGOs concerned with the position of women. Sida can ensure that any studies, consultations and analyses undertaken for programme planning purposes consider gender differences and women-specific concerns by, for example: - including these issues in terms of objectives, - including local experts on gender issues in health sector study teams, - ensuring that all consultation processes include gender equality objectives.

Gender Equality, Health and the Health Sector
Sector Analysis

Chapter 2, page 1

NOTE:
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This indicates the moment or stage in the programming cycle to ask these questions:

- sector analysis
- project formulation/appraisal
- annual review/monitoring
- evaluation

3.1 Sector Analysis

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Analysis of problems and issues in the education sector: Do the analyses of problems and issues in the education sector (done by Sida or national institutions or jointly) look at differences between women and men, girls and boys, in access to education and the major educational indicators? For example, do the analyses consider: • differences by gender in major educational indicators (such as literacy, enrolment, drop-out, attainment, subject specialisation) • differences in the number of school places open to girls and boys at various educational levels • differences in demand for education for girls and boys evident in the actions or views of parents and local communities • values on equality incorporated into school curricula and materials	Asking these types of questions is a necessary first step in identifying: • the existence and forms of gender disparities in education; • the particular barriers to education faced by girls and women; • the impact of the education system on equality between women and men; • the availability of information to assess the above.	Expand networks and information base on gender equality issues in education: • undertake specific studies • consult with women's organisations. In all studies, consultations and analyses: • include gender equality issues in TORs • include local experts on gender equality issues on study teams • include gender equality advocates in all consultation processes.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Analysis of current sector policies and programmes (including spending priorities): Are national policies, programmes and investments in education likely to extend benefits and opportunities equitably to girls and boys? Do the criteria used for prioritizing investments take account of gender differences in educational access and attainment? Have economic reform and structural adjustment initiatives affected the distribution of educational opportunities between girls and boys? Have specific initiatives been taken in the country to increase girl's access to education and improve educational outcomes for women? Have evaluations been done or is other information available to assess this experience? Do national policies on education reflect the commitments made in the Beijing <i>Platform for Action</i>, the <i>World Declaration on Education for All</i>, and national policies on women's position or gender equality? Are there national institutions and organisations that could support the development of gender-aware approaches in education?	This step in the analysis is concerned with assessing the extent to which educational disparities are being addressed by current national policies and programmes in the sector, and to identify starting points and allies in raising the issue. Dialogue on equality issues can be assisted by reference to government commitments to improving the position of women. In many of Sida's partner countries, the national constitution and the adoption of international conventions provides a basis and a justification for pursuing women's rights and equality issues. Many countries have also established national policies on the position of women or gender equality that state general principles as well as sectoral objectives. Many have also established a government ministry or office of women's affairs that acts as an advocate for gender equality and gender responsiveness in the programmes of sectoral ministries. National and local women's organisations and women's studies centres are other resources that could support the development of gender-aware policies and programmes.	Compare results of sector analysis with commitments in the Beijing <i>Platform for Action</i> and/or national policies on gender equality. Consult with: • government ministry or office for women's affairs • women's organisations, women's studies centres Encourage sectoral partners to consult with these organisations.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Analysis of the capacity of the education ministry and other government institutions in the sector: Do national policy and implementing have the capacity to identify and address equality issues in education? Consider, for example: • Do they have data on enrolment, drop-out, repetition, attainment, distribution by subject speciality, etc., that is disaggregated by sex? • Do planners and managers have the skills to formulate and analyse questions on the gender aspects of education and the barriers faced by girls and women? Do the authorities responsible for the development of curriculum, textbooks and educational materials have the framework and skills for ensuring that these support gender equality? • Do the political will and resources exist to respond to equality issues in education? Are planners and decision-makers aware of the commitments to women's education made in the Beijing <i>Platform for Action</i> and the Jomtien Declaration? • Have any gender equality advocates within these institutions been identified?	If the national and local institutions responsible for educational policy and programmes lack the capacity to identify and address gender equality issues, then donor action within projects will remain isolated initiatives with limited long-term impact. Analyses of how organisations adopt new perspectives, including gender equality perspectives, have identified the importance of policy advocates. These are people within an organisation (i.e., the Ministry of Education, teacher training institute, curriculum development institute) who are willing and able to promote a equality perspective, who have the knowledge and skills to demonstrate its relevance to the organisational mandate and goals, and can identify opportunities and allies to push the issue forward. The identification of individuals who are taking on this role, or potentially could do so, is a means by which to support processes already under way and to assist Sida staff in developing their analysis and strategies in the sector. Sida could assist these individuals through providing moral support, training, access to national or regional networks, etc.	Provide support for: • strategies to address gaps in data and information; • components on equality between women and men in capacity development initiatives for policy and planning officials; • components on equality between women and men in capacity development initiatives with teacher training institutes and curriculum development institutes; • current or potential advocates of equality and women's education within partner organisations; • research by national institutions or women's organisations on equality in education; • processes for public participation that ensure that the views of both women and men are expressed.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Analysis of employment and working conditions in the education sector: Are the employment and human resource development strategies being pursued by national partners such as the Ministry of Education promoting equality in employment in the sector? • Have efforts been made to increase the representation of women at planning, management and decision-making levels in educational institutions and the education system? (E.g, through recruitment, promotion, staff development opportunities?) • Are there policies to address concerns with personal security that are mainly faced by women staff (in relation to housing for teachers, sexual harassment of teachers, travel requirements for advisory and supervisory staff)? • What has been the impact of restructuring and reduced public expenditure on education on workers at the lower levels of the hierarchy in the sector (where women tend to be concentrated)?	Equitable employment and career development opportunities for women are an important equality issue in most sectors, including education. Development cooperation programmes provide a number of opportunities to support equitable employment opportunities. Note that CEDAW and the Beijing <i>Platform for Action</i>, which have been adopted by most Sida partner countries, include commitments to equality between women and men in public and private sector employment.	Assist partners to: • analyze the gender balance in employment in the sector and identify barriers to equal participation by women; • formulate objectives concerning the representation of women in policy and management fields and set targets for recruitment, training and advancement; In Sida-financed training: • include measures to ensure equitable participation by women.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Analysis of opportunities: Generally with respect to education, where are the possibilities for change or for development cooperation to have a positive impact on women's education and gender equality? Does the Beijing <i>Platform for Action</i>, or the <i>Amman Affirmation</i>, offer opportunities to raise new issues or start a broader dialogue with partner institutions on equality in education? What are the constituencies that support gender equality, and what programme elements can be built around them?	In considering the overall situation, it is important to have a sense of where possibilities for change and impact exist, given the situation in the country, the priorities of partner organisations, and the areas of Sida expertise. Neither Sida nor its sectoral partners will be able to immediately and simultaneously address all the equality issues in the sector, particularly if they are only beginning to take up these issues. Rather than being overambitious and accordingly unfocused it is better to begin with a clear focus and specific objectives that can be revisited and revised in the light of changing circumstances and opportunities. Changes must have a domestic resonance and "demand." An important part of policy dialogue is the identification of those gender equality issues on which Sida can work fruitfully with its national partners, and the joint determination of feasible medium-term objectives.	Consult with women's organisations and other gender equality advocates about priorities, opportunities and constraints.
Initiatives of other donors: Are there other donor initiatives in this area that Sida could complement and build on?	Consultation with other donors is a means to gain further information and to identify possible areas of complementary or collaborative action to maximize collective impact.	Share information with other donors.

3.2 Project Formulation/Appraisal

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Consultation: Is there a process for consultation with organisations and communities concerned with the objectives and activities of the project? Is the process structured to ensure that the views of women as well as men will be identified? Consider, for example: • Were both women and men consulted? • Which women/ which men? • How were they consulted -- through meetings? interviews? survey? Are concerns about gender disparities included among the issues addressed in the consultations?	Consultation and participation are themes emphasised by Sida in all aspects of development cooperation. In considering these processes from a gender equality perspective, it is important to ask <i>who has been consulted</i> and <i>whose needs</i> have been identified as important, and whether the methodology of consultations influenced women's participation and the findings. For example, if community consultations are mainly with village and district authorities, it may be mostly the views of men that are heard. Similarly, if consultations with teachers focus on head teachers, in many countries these will mostly be men. In addition to consultations with local communities or organisations directly targeted by a project, Sida can consult with experts and activists from women's advocacy groups and women's studies centres. These can assist in identifying who to consult, how to consult, what to consult about and how to interpret the findings of the consultations. A gender analysis, as suggested below, is another input to this process.	Specify a specific requirement to consult with women and women's organisations in contracts and TORs. Assist sectoral partners to develop inclusive, gender-sensitive consultation methods.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Gender analysis: Does the initial analysis for project planning include gender perspectives? That is, • Is project planning based on an understanding of gender disparities in education, and the different factors influencing the participation by girls and boys in education? • Are the perspectives of the Beijing <i>Platform for Action</i> and commitments to women's education in the Jomtien Declaration used as an input to project planning? • Do institutional assessments consider institutional capacity to address equality issues?	Including an equality perspective in analyses for a project ensures a stronger basis for specifying objectives and strategies, which otherwise may be based on (implicit or explicit) assumptions that may not turn out to be valid. Although the analysis and design of programmes and projects may be prepared by national partner organisations rather than Sida, Sida can provide assistance and support to partners in undertaking this analysis and also review the issues in its own appraisal process. Willingness to do this can be suggested at an early stage of dialogue on programme and project possibilities and can be justified by national commitments to gender equality such as the Beijing <i>Platform for Action</i>.	Project formulation by partners: • identify and/or finance the requisite expertise. Project appraisal by Sida: • appraisal team: include a member with expertise on equality in education • contract TORs: include responsibility to consider equality issues

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Project objectives: Do the project objectives specify what the project seeks to achieve in relation to gender equality in education? Have the equality concerns been considered in relation to the main issues the project was established to address? Have targets and indicators been established to clarify these objectives and to allow them to be monitored?	Gender-based differences in the situation of women and men mean that a "gender-neutral" or "gender-blind" project may fail to extend benefits to girls and women or to address gender disparities in the sector. This is best avoided by ensuring that the project objectives make specific reference to gender equality. Care should be taken to ensure that the gender equality objective specified is related to the main concern of the project or the impact it seeks to achieve. All too often, gender integration has been pursued by identifying an objective in a marginal area of investment. Instead, attention should be focused on the main concern of the project. For example, in an initiative to enhance the capacity of a curriculum development institute, the major opportunity from a gender perspective is to enhance capacity to develop curricula and education materials that support equality between women and men (rather than the distribution between women and men of any training opportunities that the project might offer). Consultations with women's equality experts and advocates can assist with the identification of objectives, targets and indicators relevant to a particular project.	Identify gender equality objectives that contribute to overall project goals. Consult with women's equality experts and advocates.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Implementation strategy: How will objectives for gender equality and women's participation be pursued in the project? • Have specific strategies been identified to pursue these project objectives? • Have the obstacles that may keep girls and women from benefiting or participating been identified and appropriate strategies developed? • Have the budgetary implications of the gender equality elements of the project been anticipated? • Does the project management strategy and budget provide for the necessary expertise on issues of equality and women's education?	Often, gender equality provisions are left to be "self-implementing" and the resources required to carry them out are often not dedicated. In other cases, the project design provides for some exploration of possible strategies on gender equality issues as part of project implementation rather than design, without providing a contingency fund or flexibility to finance the strategies identified. In both cases, good intentions are frustrated. The need for technical expertise is often underestimated. Specific skills and expertise are required for high-quality project design and implementation. Realism in estimating the resources required to achieve gender equality components is vital to retain respect from partner and contracted organisations.	Review project plans and contracts: • is there a strategy to implement gender equality objectives? • is the necessary expertise provided for? • are budgetary resources provided?

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Expectations of the implementing agency: Does the implementing institution or agency have a commitment to gender equality and to achieving positive outcomes for women through the project? Indications of such a commitment might include: • serious engagement by senior officials in discussions on gender equality issues; • willingness to dedicate its own resources to action in this area (financial resources and staff time, including willingness to send senior staff on training); • a current set of guidelines on gender equality that are used by staff; • awareness of government commitments made in the <i>Beijing Platform for Action</i>; • ongoing links to women's equality advocates and researchers. Are the responsibilities and expectations concerning gender equality clearly spelled out in any agreements and contracts?	The implementing institution's understanding of and commitment to achieving project objectives on gender equality, and its ability to be flexible and innovative in pursuing these objectives, will be an important factor in the project's success in this area. Discussions on these issues can assist Sida to identify areas in which it can work constructively with national partners on gender equality issues in the sector. Such discussions will also assist Sida in identifying ways in which it can support national partners to develop their own capacity on gender equality issues. Accountability on gender equality issues is facilitated when responsibilities are clearly specified in each agreement and contract.	Discuss gender equality objectives with national partners and contractors. State responsibilities of each party in agreements and contracts. Provide resources to strengthen the understanding of equality in partner institutions. Identify strategic allies in partner organisations and work with them.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Reporting and monitoring: Does the reporting and monitoring system for the project provide for sex-disaggregated data collection on the indicators selected to monitor change and impact? Will both women and men be involved in identifying indicators to monitor change and impact, and will both be involved in providing feedback?	Equality concerns must be considered in the identification of indicators for monitoring change and impact in order to draw conclusions about achievements and to identify issues of concern. Relevant indicators depend on the nature and objectives of the initiative. Depending on the initiatives, indicators might include, for example: • changes in enrolment, drop-out, retention, performance of girls compared to boys (sex-disaggregated data collection); • changes in attitudes of teachers, administrators, parents or communities about the value of educating girls; • changes in the capacity of planners or the resources available to planners for addressing equality issues in education; • increases in the proportion of teaching materials produced that meet specific criteria regarding the absence of gender stereotyping and the promotion of equal relations and opportunities for girls and boys.	Identify variables for sex-disaggregated data collection and for monitoring project impacts on equality. Achieve agreement with partner or implementing institutions on the key variables.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Revision and renewal of projects: Have the objectives and design of a programme or project being considered for renewal been assessed from a gender equality perspective? That is, are questions being asked in the review and renegotiation process about: • project efforts and achievements to date in addressing gender gaps and disparities in educational access and performance; • whether project objectives and strategies require modification to reflect the concerns and approaches outlined in the Beijing <i>Platform for Action</i> or the directions for girl's education contained in the Jomtien Declaration; • whether the partner or implementing agency has developed an awareness or commitment to equality concerns in education.	The questions in this section are most effectively raised at the initial design stage of a project, but can also guide thinking when a programme or project is in progress or will be continued in a new phase. While options may be more restricted once the main elements of project design and objectives are already in place, small changes at this stage could still have important impacts. In addition, the renewed commitments to educational equality made in the Beijing <i>Platform for Action</i> and other international statements place a responsibility on both Sida and partner governments to modify ongoing initiatives to provide further support for equality objectives.	In evaluation TORS, identify the information required to address gender equality issues in the project. Identify internal allies on equality issues (in partner institutions and on project staff) for discussions on possible project modifications. Consult with the government office or ministry of women's affairs or women's advocacy organisations. Use documents such as the Beijing <i>Platform for Action</i> in dialogue with partners.

3.3 Annual Review

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Preparations for the review; Have there been important events or developments since the last review that present new problems, issues or opportunities? For example: • new legislation, government policies, or commitments on equality relevant to the education sector (for example, as a result of the <i>Beijing Platform for Action</i>)? • a decision by the national government to undertake a broad policy review in the education sector, which would provide opportunities to raise new issues; • developments that may affect demand for education for girls (e.g., increases in school fees); • new information or knowledge arising from research, ongoing projects, or evaluations that suggest promising approaches or strategies or suggest problems with existing policies or strategies. • the formation of new women's networks and organisations with an interest in equality in education.	These questions assist in assessing whether sectoral and project analyses remain valid and in identifying whether programme modifications should be made. Such modifications might address problems and issues identified in the course of programme implementation or be proposed to take advantage of new opportunities that have arisen.	Consult with women's organisations to identify problems and opportunities. Include emerging issues and problems in TORs for Annual Review. Undertake preliminary discussions with partners on problems and opportunities that emerge and possible strategies in response. Consult with other donors about successes or pilot projects that have supported equality objectives.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Analysis of projects: In the analysis of each project: • Have short-term targets relating to gender equality been reported on and met? (E.g., targets for girls' participation in education, or for curriculum review on equality issues.) • What has supported the achievement of these targets? Can lessons be drawn for other projects? • If they have not been met, why not? Can measures be taken to address obstacles encountered? • Are the original targets still relevant?	This is an essential step in monitoring project implementation. It is an opportunity to assess progress to date and decide whether or not changes in basic project design are required. Although the best moment to integrate a gender perspective is during programme or project design, adjustments can still be made in the course of implementation. The Annual Review process also provides the opportunity and mechanisms to achieve agreement with national partners on any changes to project strategies that may be required. However, satisfactory discussions resulting in agreements on new or revised strategies will be more likely to occur if the groundwork has been done in the quarterly meetings leading up to the Annual Review.	Enquire whether targets have been met. Discuss with partners measures to be taken. Agree on targets.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Approaches taken by partners: Do the implementing organisations and contractors (including Swedish organisations) have a clear understanding of the gender-related issues and equality objectives of the project?	This is the moment to ensure that all stakeholders are on the same path with respect to project objectives concerning gender equality and women's participation, and whether Sida needs to provide additional assistance to its partners to ensure objectives in this area will be met. Sida could, for example, provide gender training, or facilitate the establishment of linkages between the implementing institution and other actors (such as the national office for women's affairs, women's organisations or NGOs concerned with equality in education, other projects or institutions that have been innovative in addressing equality issues).	Assess understanding of gender-related issues. Advise about possible activities. Agree on actions to be taken.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Agenda of the Annual Review: Are equality concerns in the education sector on the agenda of the Annual Review? That is, will equality concerns be considered as an integral part of the discussions of several agenda items, and/or be an item on its own? Does Sida have clear goals for raising these issues in the Annual Review? Is a senior member of the Sida team briefed and ready to speak to the issue?	If equality issues are not explicitly included in the agenda they may be omitted from the discussion, or get less attention than required. It is important to have one agenda item (not at the end of the meeting) in which equality concerns are explicitly discussed and agreements reached concerning progress toward goals. But this should not mean that there is no discussion of gender equality issues in the context of other agenda items. Both types of discussion are important. Discussions will be more effective if Sida has clear reasons for raising particular gender equality issues, and is also clear on the desired "outputs" of the discussion. The priority that Sida accords to gender equality issues will be reflected in the seniority of the staff member assigned to address this issue in discussions.	Discuss agenda and TORs. Clarify outputs desired. Brief head of delegation.
Agreed minutes: Do the agreed minutes reflect the discussions during the Annual Review on gender equality issues?	The minutes of the Annual Review are an important document. The draft should be reviewed to ensure that the equality issue is dealt with in the manner intended.	Review draft minutes. Clarify any problems in discussions with partners.

3.4 Evaluation

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Terms of reference: Do the TORs for the evaluation clearly specify the gender equality issues and questions to be addressed in the evaluation? Do they clearly identify what Sida and its partner want to learn about the participation of girls or about equality issues from the evaluation?	A conclusion from past experience is that evaluation TORs must include explicit and feasible directions for the analysis of gender issues in order to produce a report that is helpful for future planning purposes. The long-standing policy of integrating a gender perspective in all Sida projects provides a rationale for including related issues in evaluations, even if specific objectives on women's education or gender equality are not included in project documents. Given that evaluations often provide the basis for an extension or further phase of cooperation, they provide a critical opportunity to identify what can be learned from past efforts and achievements and to build on this in accordance with Sida's gender equality policy.	Identify evaluation issues with national partner. Formulate clear and specific directions on gender equality issues for the TORs.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Project design and implementation: Will the evaluation review the process of project design and implementation? Is it clearly specified that this review should consider the extent to which Sida's gender equality policy has been followed?	This is important to specify as evaluations are frequently limited to assessing objectives stated in the project documents rather than broader issues of Sida policy such as gender equality objectives (which are not explicitly stated or interpreted in the documentation of many projects). Thus the opportunity to learn from past experience about what works and what is necessary for successfully integrating a gender equality strategy are missed. Basic questions about the process of project design and implementation include: • initial analysis: Was project planning based on an understanding of gender disparities in education? • baseline data: Was project planning based on sex-disaggregated data? • consultation and decision-making: Did women participate to the same extent as men in decision-making in project planning and implementation? • gender equality objectives and strategies: Did the project plan specify objectives and strategies concerning gender equality and women's participation?	Formulate specific questions for TORs about project design and implementation.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Project outcomes with respect to education access and performance an equality in education: Will the evaluation consider project outcomes for educational access and performance? Do directions to the evaluators clearly specify that the analysis should consider outcomes by gender? Or will the evaluation consider project outcomes with respect to capacity to develop policies and programmes and materials that support gender equality? Do directions to the evaluators specify that this should include capacity with respect to gender-aware planning and programme implementation?	These questions are important for developing a better understanding (for future projects and for project planning) of what works in what context. The questions to be asked depend on the scope and type of a particular intervention. Types of questions that might be relevant could include, for example: • How has the intervention affected access to education by girls and boys and gender disparities in access? • Have there been changes in drop-out rates and performance by girls? How does this compare with boys? • Has there been any changes in educational materials and curricula in support of gender equality, or capacity to produce such materials? • Were project equality strategies appropriate to the project's mandate and context?	Formulate specific questions for TORs on project outcomes for equality in education.

Initial questions for Sida staff:	Why ask these questions?	What steps can you take?
Evaluation process/methodology: Does the evaluation process/methodology provide for the types of information and data-gathering and that would allow a gender analysis? Does the evaluation plan provide for consultations with women and men on their views about project results and impacts? Is it specifically required that the data collected for the evaluation (from project records, government administrative data, surveys, consultations with communities, etc.) be disaggregated by sex? Do the TORs provide that the evaluation team will include a member with the requisite skills assigned to undertake the gender analysis?	These processes for ensuring that the views of both women and men are obtained and that sex-disaggregated data is collected must be built into the planning of the evaluation if it is to be done in a cost-effective manner. Past experience indicates that an adequate gender analysis requires that the evaluation team must include a member with specific and demonstrated expertise on gender analysis who is in charge of that aspect of the work.	Review: • evaluation TORs • evaluation plan • composition of evaluation team
Lessons learned: Does the evaluation call for the identification of specific "lessons learned" about gender equality issues in any of the areas above and recommendations for future projects?	This may seem very obvious -- given that the task is an evaluation -- but it is often not done even where data has been gathered. Thus, to avoid losing an opportunity to learn from experience, the evaluation TORs should specify a requirement to discuss lessons learned with respect to gender equality issues through the project and the evaluation.	Review TORs. Review evaluation report. Disseminate "lessons learned" to staff, partners and consultants.



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