

Advocating for equity-focused and gender-responsive evaluation policies

Key messages:

- A large number of national policies and international alliances are now focusing on achieving equity-focused and gender-responsive development results.
- While a strong focus on the equity and gender perspective in social programmes is the right way to go, it poses important opportunities and challenges for the evaluation function.
- Challenges related to promotion and implementation of equity-focused and gender-responsive evaluations could be overcome by advocating for equity-focused and gender-responsive national evaluation policies and systems.
- CSOs, VOPEs and other stakeholders can strengthen their advocacy for equity-focused and gender-responsive evaluation policies by forming strategic partnerships with existing platforms and agencies. Consider pro-equity bilateral agencies, UN entities, foundations, NGOs, relevant government bodies and other actors. EvalPartners is a leading advocacy platform for promoting equity-focused and gender-responsive evaluation policies.
- Involving marginalized groups in evaluation advocacy planning, action and monitoring and evaluation is another way to provide legitimacy and strengthen the movement on pro-equity and gender evaluations.
- Strengthen knowledge exchange on how to advocate for equity-focused and gender-responsive evaluation policies. Capture best practices, lessons learned and innovations. Use social media, including blogs, webinars, community of practice to strategically build a constituency of evaluation advocacy practitioners focusing on equity-focused and gender-responsive evaluation policies.

Importance of including equity and gender perspective in evaluation¹

Inequity remains one of the most important human rights challenges facing the world community. A human rights-based approach means that the situation of marginalized people is viewed not only in terms of welfare outcomes but also in terms of the obligation to prevent and respond to human rights violations. The High Commissioner for Human Rights stated that human rights are about ensuring dignity, equity and security for all human beings everywhere. Equity is a cornerstone of effective and harmonious relationships between people and it underpins our common systems of ethics and rights.² Social and gender equity are thus integrated into the human rights framework adopted by the UN, with the primary intention of making progress towards the realization of human rights.

Why does equity matter?

¹ This section is adapted from the presentation: *Equity focused and gender responsive evaluation, Why is it strategically important?* by Belen Sanz Luque, at the EvalPartners International Forum on Civil Society's Evaluation Capacities held at Chiang Mai, Thailand on 3-6 December, 2012 and the publication, Bamberger M., Segone M., (2011). *How to design and manage equity-focused evaluations*. UNICEF.

² UN NGLS. (2002). *Go between*, 92. Geneva, Switzerland

- Inequity constitutes a violation of human rights.
- Inequity is one of the major obstacles in taking advantage of the richness of diversity.
- Inequity may lead to political conflict and instability.
- Prolonged inequity may lead to the 'naturalization' of inequity.
- Equity has a significant positive impact in reducing monetary poverty, achieving development results and social justice.
- Equity has a positive impact in the construction of a socially fair, politically stable, economically strong, democratic society.

Pro-equity interventions prioritize worst-off groups with the aim of achieving universal rights for all. This could be done through interventions addressing the causes of inequity and aimed at improving the well-being of all, focusing especially on accelerating the rate of progress in improving the well-being of the worst-off groups.

Here 'equity' should be distinguished from 'equality'. The aim of equity-focused policies is not to eliminate all differences so that everyone has the same level of income, health, and education. Rather, the goal is to eliminate the unfair and avoidable circumstances that deprive people of their rights. Therefore, inequities generally arise when certain population groups are unfairly deprived of basic resources that are available to other groups. A disparity is 'unfair' or 'unjust' when its cause is due to the social context, rather than to biological factors.

In terms of the evaluation, it means taking a closer look at inequalities and discriminatory structures to provide evidence about who benefits (and does not) from development policies and programmes. An absence of equity and gender focus in evaluations carries the risk of perpetuating discriminatory structures and practices. Knowledge generated through an equity and gender-focused evaluation provides critical evidence to support advocacy with policy-makers, that a pro-equity and gender-focus enhances the impact of social policies. Equity and gender-focused evaluation also provides information to leverage major partner resources – and political commitment – for national evaluation capacity development. While UNWomen has been working to advance this agenda given its mandate and the strategic role of evaluation for promoting gender equality, EvalPartners is a strategic platform where many development actors have come together to push for more equitable development policies. ***Regional and national stakeholders can link with these existing platforms to gain strength in advocacy for equity and gender focused evaluations.***

Equity and gender-focused evaluation processes must also be used to foster wider participation of worst-off groups, facilitate dialogue between policy-makers and representatives of worst-off groups, build consensus, and create "buy-in" to recommendations. Such evaluations are most effective when they maximize participation and inclusiveness as well as empower stakeholders to come together to influence policies that affect them. ***At the same time, participation of marginalized groups, within the evaluation advocacy strategy development, the implementation and the monitoring and evaluation, will provide broader support for the issue, and thereby increase legitimacy and effectiveness of the advocacy efforts.***

In order to build a constituency of advocates that promote equity and gender-focused evaluation policies; it is necessary to cross-fertilize ideas, experiences, challenges, innovations and lessons in this area. **Capturing and sharing knowledge** around pro-equity and gender evaluation advocacy through events, conferences and social media helps to raise awareness on the issue as well helping to shape common solutions to the challenges.

Advocacy to overcome challenges in promoting and implementing equity-focused and gender-responsive evaluations³

Various challenges can be faced when promoting and implementing equity-focused evaluations. These challenges can be overcome by advocating for national evaluation policies and systems that are equity and

³ Bamberger M., Segone M. (2011). *How to design and manage equity-focused evaluations*. UNICEF.

gender responsive. Such evaluation policies and systems should explicitly create a roadmap that will lead to promotion, implementation and use of equity and gender focused evaluations.

Potential challenges in promoting equity and gender-focused evaluations include:

- Reluctance to accept disaggregated indicators, which can show country performance in a poor light.
- Political and social resistance to addressing the causes of exclusion and vulnerability.
- Resistance to empowerment of worst-off groups.
- Lack of interest/incentives and reluctance to invest resources in the worst-off groups.
- Poor governance, which prevents decentralization of authority and resources, resulting in limited delivery of services to the worst off groups.
- The contentious legal status of worst-off groups in some countries.

Potential challenges in implementing equity and gender-focused evaluations are as follows:

- Methodological challenges in the evaluation of complex interventions.
- Lack of disaggregated data or data collection capacity, and reluctance to change existing methodologies.
- Additional cost and complexity.
- The need to base the programme and the evaluation on a programme theory of change for more in-depth analysis.
- Reluctance of some governments to work with civil society.

Integrating dimensions of equity and gender in evaluation

It is about *what* we evaluate and *how* we evaluate. In terms of *what we should evaluate* – evaluations should pose research questions about equality, equity and discriminatory practices that may be affecting the reach and success of the programme or policy. More specifically, equity-focused and gender-responsive evaluation assess if interventions have:⁴

- been guided by the relevant national, regional and international normative frameworks for equity and gender equality;
- analyzed and addressed the structures that contribute to inequalities experienced by women, men, girls and boys, especially those experiencing multiple forms of exclusion;
- maximized participation and inclusiveness (of rights-holders and duty-bearers) in their planning, design, implementation and decision-making processes;
- sought out opportunities to build sustainable results through the empowerment and capacity building of women and groups of rights-holders and duty-bearers; and,
- contributed to short, medium and long-term objectives (or lack thereof) through an examination of results chains, processes, contextual factors and causality using gender and rights analysis. In addition, evaluation places a strong focus on excluded or disadvantaged groups in assessing whether their needs and interests have been addressed by the intervention, and promotes inclusive approaches for their voices to be heard.

In relation to *how we should include equity and gender focus in evaluations*– Equity and gender focused evaluation data collection and analysis techniques are built on approaches that are already familiar to many practitioners in development evaluation. The emphasis is on refining and refocusing existing techniques – and enhancing national capacities to use those techniques – rather than starting with a completely new approach.

⁴ UNEG. (2011). *Integrating Human Rights and Gender Equality in Evaluation: Towards UNEG Guidance*.