

# Gendered Evaluation

## Abstract

Evaluation can be done better by ensuring that evaluation tools are not gender-blind. There is a rich pool of resources available on evaluation frameworks, methodologies and tools; and equally there is substantial literature on gender analytical frameworks, approaches and tools. However, within the international aid and development context, it seems that evaluation and gender often operate in separate spheres of data collection and analysis. Gendering the process of evaluating initiatives or programs, which are focused on having a positive impact on human beings, will ensure that the full potential of existing evaluation tools is realised.

Why integrate gender into evaluation? By not considering the different experiences of males and females, a gender blind approach to evaluation can not fully capture the richness or complexity of change that is occurring. There is increasing international recognition that gender can no longer be thought of as simply a “cross-cutting issue”; instead it should be thought of as integral to understanding the impact of aid and development across all policy areas. Addressing the Millennium Development Goal 3 (MDG3), that is advancing gender equality and the empowerment of women, is critical for the continuous improvement in the quality and effectiveness of assistance delivery. Domestically, the profile of gender inequality issues has been raised through the Government of Australia’s White Paper (2006) and Gender Equality Policy (2007).

This paper supports the proposition that it is critical to have gender equality as an overarching guiding principle for managing the whole cycle of donor assistance: policy development; budgetary allocation; planning and designing; delivery; monitoring and evaluation (M&E); completion; and program performance assessment. At the delivery level, by including gender-sensitive indicators in the Monitoring and Evaluation and Quality Assurance Framework (MEQAF) for the China Australia Governance Program (CAGP), funded by the Australian Agency for International Development (AusAID), gender is institutionalised into the management of the program and key actors are held accountable. To ensure that gender-sensitive key performance indicators (KPI) are achieved, a pragmatic approach to program implementation needs to be taken, which involves continuous hard work and commitment by program staff.

A number of key issues challenge the successful integration of gender considerations within evaluation frameworks, which include: (1) the significant lack of sex- and gender-disaggregated data globally; (2) capacity to develop quality indicators, and collect, analyse, and manage gender-sensitive data; and (3) ensuring sufficient political commitment to and resources for effective gender integration, training and application of knowledge. To enable quality data for evaluating the human impact of development initiatives, these fundamental challenges need considerable attention and investment in order to be adequately addressed.

## Gender Equality: An Overarching Principle

As a concept, ‘gender’ is essentially about identity and power relations. Whilst gender is not a natural phenomenon, biological differences between males and females are often

linked to and/or used to justify the construction of different roles, rights, responsibilities and obligations of men, women, boys and girls. Gender differences are time-bound (AusAID 2007:8) and embedded in social and cultural values, beliefs and practices. Understanding who influences the construction of gender identities and relations provides insight into the power dynamics within a specific social and cultural setting. Constructed identities and norms for gender relations influence and inform an individual's lived experience, whether or not he or she affirms or rejects the identity projected on him or her; as a result, males can have quite different experiences from females, and vice versa, even within the same context and situation. As a multifaceted issue, complex cross-cutting considerations for gender include age, religion, ethnicity, politics, geography and disability. Gender issues cannot be simply viewed as issues between homogenous groups of 'females' and of 'males'; gender issues are also between males and between females.

'Gender equality' is a concept focused on ensuring there are no disparities in access to health and education, economic and political resources and opportunities as well as a safe living environment on the basis of perceived differences and, therefore, discrimination between and amongst males and females. Underpinning gender inequality are issues caused by limited or lack of time, money and/or visibility (Mitchell 2007). As gender inequalities within developing countries usually disadvantage women, the concept of 'empowering women' focuses on strengthening the ability of women and girls to control their own destinies through not only having equal access to social services, resources and opportunities but also being able to exert their rights, capabilities, resources and opportunities to make strategic choices thus becoming active agents in their social environment (UN 2005:3). For over thirty years, the issue of gender inequality in developing countries has been attempted to be addressed within the international aid and development community through mixed approaches and interventions with varying levels of success and failure.

Since the idea of poverty eradication was elevated to the international platform at the World Summit for Social Development (WSSD) held twelve years ago (van Reisen 2005:12), the progress and effectiveness of assistance delivery has been widely questioned and debated. Consequently, public scrutiny of the accountability of aid and development, that is determining what has and has not been working, has intensified. A key outcome of the WSSD was to reach a consensus on the imperative of placing people at the heart of development; furthermore, a clear and strong link between gender equality and poverty eradication was established (UN 2000). Also held in 1995, the Beijing Platform for Action (BPfA), endorsed by 189 national governments, recognised that females comprise the majority of the world's absolute poor. Five years later, in September 2000, national governments agreed to eight time-bound goals which seek to improve the standard of living for the majority of people throughout the world. Known as the Millennium Development Goals (MDGs), these eight goals are the result of international acknowledgement of the need to scale up and accelerate the impact of assistance delivery. One of these goals is to advance gender equality and empower women (MDG3).

2005 stands out as a significant year for review and planning ways forward. A five-year review of progress towards the MDGs and a ten-year review of progress towards the BPfA were conducted during this year. The United Nations Fund for Women (UNIFEM)

published a study which, after drawing linkages between the MDGs and the BPfA, concluded that without adequate attention on advancing gender equality and empowering women, progress towards achieving the MDGs would not be possible (van Reisen 2005:18). In regards to planning ways forward, the Paris Declaration on Partnership Commitments in March 2005 sought to improve the effectiveness of donor assistance; the outcome was an agreement on a proposed “new” international aid and development architecture. The “newness” of this global good governance framework is based on a shared understanding between donor and recipient countries about being accountable for achieving results at every stage of aid and development initiatives (Boer & Purdue 2006:iii). The new focus on managing for results and measuring in terms of progress towards results has increasingly informed program/initiative/project-specific monitoring and evaluation (M&E) frameworks. Essentially this has meant that a new form of evaluation has emerged that seeks to assess program impact rather than simply measuring program implementation, inputs and outputs (Kotvojs 2006:1). The Paris Declaration can be viewed as focusing on guiding the process for achieving results; specification of the content of assistance can be seen to be directed by the MDGs (UNIFEM 2006:3).

However, gender equality is not well mainstreamed into this new aid and development agenda (UNIFEM 2006) despite the fact a number of influential international donors now support the idea of the MDG3 as critical for the continuous improvement in the quality and effectiveness of assistance delivery. Kofi Anan stated in 2006 that with half the human population being discriminated against, it is impossible to attain development goals (DFID 2007c:1). The International Finance Corporation (IFC), an arm of the World Bank Group, wholly supports the argument that eliminating gender discrimination is essential for economic growth, which is a key driver for poverty eradication (IFC 2007). In her opening speech for the ‘Symposium on the Harmonisation of Gender Indicators’ in Australia, June 2006, the Parliamentary Secretary to the Minister of Foreign Affairs affirmed that “gender issues are pivotal in ensuring the effectiveness of aid” (Gambaro 2006:4). In February 2007, the United Kingdom (UK) Department for International Development (DFID) released its Gender Equality Action Plan 2007 – 2009, which recognised that addressing MDG3 is fundamental for the achievement of all MDGs (DFID 2007a). Indeed, it is argued that gender equality outcomes are to be essential indicators of the effectiveness of the new architecture for assistance (UNIFEM 2006:3). The interconnectedness of gender equality, poverty reduction and aid effectiveness provides a convincing case for why advancing gender equality is to be an overarching principle guiding aid and development planning, implementation, and M&E. Released in March 2007, the new AusAID Gender Equality Policy seeks to approach poverty reduction through the advancement of gender equality and empowerment of women (AusAID 2007:1); it clearly presents the case for raising the profile of gender equality as an overarching guiding principle.

### **Gender Blindness vs Gender Equality Integration**

‘Gender mainstreaming’ throughout aid and development interventions has not been done well partly because of the assumption that certain policy areas, such as economic governance or infrastructure development, are gender neutral (UN 2005:21).

‘Traditional’ spheres for gender equality to be considered usually are within education and health. An independent peer review of DFID’s development assistance programs

was undertaken in 2006; examples of good practice in advancing gender equality were derived only from DFID's education and health programs (DFID 2007a:4). 'Non-traditional' spheres include economic and political governance, law and justice, defence, and humanitarian/emergency responses. It is not widely understood why gender equality should be considered within these latter areas of assistance. At the 2007 Australian Council for International Development (ACFID) 'Gender Equality: A Practical Approach to Project Implementation' training workshop, examples were provided of the importance of considering gender for 'non-traditional' sectors. Landmine projects in Cambodia, for instance, may not factor in the primary gender issues around the disproportionate number of males maimed and/or killed nor the secondary impact on the livelihoods of their wives and families. Post-tsunami humanitarian responses in Sri Lanka may not have factored in the disproportionate number of females who lost their lives due to culturally constructed gender norms about clothing and behaviour (Weerasinghe 2007). Gender-blind aid and development interventions in these 'non-traditional' spheres may not develop effective responses. By allowing some policy areas to be 'gender neutral' or 'gender-blind', gender equality is inhibited from being an overarching guiding principle for assistance.

To be 'gender-blind' is to be silent on the different experiences of men, women, boys and girls. Gender-blind development interventions, and national government policies, strategies, budgets and action plans do not use gender analysis to appreciate gender as a critical factor for achieving development results (Mitchell 2007). By being silent on gender differences in the official agenda, for instance within the formal data collection and management system, it is easy for gender to be forgotten about and/or sidelined. M&E frameworks and tools that are people focused often refer to 'people' as a homogenous group; whilst the intention behind the design is to include gender considerations in the data collection and analysis, the user applying the tool may not be gender aware and thus may not consider gender if it is not obvious in the design of the tool.

Gender statistics and indicators have a key role in eliminating gender blindness (Sharp 2007:101); they enable an assessment of progress towards gender equality results. It is critical to have direct, unambiguous and contextually relevant references to gender equality and/or women's empowerment indicators and references within evaluation systems so as to prevent users being silent on gender issues. At a deeper level, evaluation approaches that do not explicitly integrate gender considerations and analysis can not actually capture the richness and complexity of change that is occurring. Existing gender tools, such as gender organisational analysis and gender activity calendars, could be integrated within M&E systems of data collection and analysis to deepen knowledge of the issues. Furthermore, integrating gender equality considerations into evaluation frameworks, in addition to all other stages of the aid and development program cycle from planning to implementation and monitoring, addresses the critical issue of "policy evaporation" (van Reisen 2005:13), which creates and widens the gap between policy promises and actual development impact.

### **Describing "How To" Integrate Gender Equality**

Gender equality results identified in AusAID's Gender Equality Framework (AusAID 2007) are aligned with the White Paper's four themes guiding the Australian Government

overseas development assistance (ODA) (AusAID 2007:10-18). Under 'Theme One – Accelerating Economic Growth', AusAID has specified the improved economic status of women as the gender equality outcome (AusAID 2007:11), which will involve taking into account the potentially different impacts of economic policies on males and females. "Through its support to the Chinese Government policy reform process, CAGP aims to highlight gender dimensions of policy formulation that may otherwise have been overlooked" (Hanrahan 2006). But *how* can gender be integrated into the program management cycle?

With the goal of poverty alleviation, the CAGP is a policy-focused program comprising of three components: (1) a funding facility for small-scale, short-term governance activities in priority areas; (2) longer-term assistance for projects supporting implementation of specific policy initiatives; and (3) administrative support for the Australian Development Scholarships (ADS) Program. Delivery is approached through a partnership between the Donor, Managing Contractor, the Ministry of Commerce and the National Development Reform Commission (NDRC). Based on the principles of contribution analysis, the MEQAF is designed to provide a well-informed decision-making process for the selection of appropriate governance activities that will contribute to policy reform and hence demonstrate plausible association with poverty reduction. As the performance of the Managing Contractor, Management Group and Charter Board are all assessed under this partnering approach, the role of M&E in program management focuses on gathering data to feed into performance assessments as well as provide information for the on-going review and improvement of the management of the CAGP. Notably, MEQAF KPIs include a gender-sensitive indicator. Accountability for implementing gender equality initiatives is thus built into the framework; responsibility falls upon both partner government agencies and the managing contractor. However, striving towards attaining the gender-sensitive KPI demands ongoing perseverance and considerable work by individuals who drive the implementation of the gender strategy.

Centered on Australian and Chinese Government gender policies, the CAGP Gender Strategy comprises of four key elements: partnership; gender mainstreaming; capacity building; and participation (Hanrahan 2006). Partnership involves ensuring commitment, at the commencement and during the life of the Program, from CAGP partners, activity designers and CAGP counterpart implementing agencies to integrating gender throughout all stages of the CAGP (Hanrahan 2006). An example of supporting gender mainstreaming is the appointment of a Chinese Advisory and Quality Assurance Group (AQAG) core member as Gender Adviser who coordinates gender training and undertakes annual reviews of the CAGP Gender Strategy; additional gender advisers are contracted for inputs on a specific issue at various stages of the program cycle (Hanrahan 2006). Ongoing gender training is conducted for CAGP and counterpart staff as part of the capacity building approach. Key outcomes of this gender training include: (1) the development of a CAGP Gender Action Plan; and (2) the identification of CAGP partners as Gender Focal Points, with a terms of reference (ToR), to ensure commitment to integrating gender throughout the program cycle is maintained (Hanrahan 2006).

To build an appreciation and understanding of why sex-disaggregated data should be collected and why gender analysis should be incorporated into the policy development process, gender training was extended to senior personnel from Chinese government

bodies, such as the Research Institute of Fiscal Science (under Ministry of Finance) and the Economics Research Institute (under NDRC) as well as external fiscal and social security experts, who were responsible for implementing CAGP activities (Hanrahan 2006). The importance of having gender specialists to review and advise on the methodologies and tools used for data collection and analysis was recognised by a collaboratively managed (the CAGP, Fiscal and Financial Affairs Division of the NDRC and the Economic Research Institute) fiscal reform project (Hanrahan 2006). Seeking to address the financial situation of county and township governments of four provinces, the project acknowledged the different impacts of resource allocations amongst men and women.

Success to date of the CAGP Gender Strategy is reflected by the positive attitudinal change amongst CAGP partners and counterpart agencies from the start of the program, when some members provided only passive support for gender issues, until the present, whereby these same members not only appreciate but openly support concepts of gender equality integration. However, it is critical to note that advancing gender equality in practice is an ongoing challenge fraught with multiple and often simultaneous complexities. Gender strategies for development programs are limited in that whilst they can present awareness raising and mainstreaming ideas and strategies, they cannot ensure that action and change will actually take place. Having multiple stakeholders and a short timeframe, development programs strive to *contribute towards* achieving gender awareness amongst all involved and the integration of gender equality considerations in all activities.

### **Quality Gender Integration: Challenges and Opportunities**

Gender integration and gender mainstreaming are concepts captured in international donor policies. However, what remains to be weak is the “how to” implement these concepts and track how effectively donors are integrating or mainstreaming gender in practice for the purpose of informing development work and improving the impact of assistance delivery (Brambilla 2001:1 and Crawford 2006:7). Issues are heightened not only by the limited capacity of partner governments of developing countries to develop gender-sensitive indicators, and collect, analyse and manage data but also by the weak leadership of government agencies in donor countries in demonstrating commitment to advancing gender equality. This is due however partly to the lack of understanding and incentive of how to do so in a practical sense as part of the daily work.

The successful integration of gender considerations within evaluation frameworks faces a number of key challenges. Firstly, it is increasingly becoming widely recognised that the significant *lack of sex- and gender-disaggregated data* globally is a critical issue (Lee 2006:27-29); sex-disaggregated data on gender asset gaps, for instance, is particularly scarce. Donors, such as DFID, AusAID and the UN, not only acknowledge this fundamental issue but have developed policies, strategies and/or action plans that seek to redress it as a key priority. In light of gender equality being an overarching principle and its direct link with poverty eradication, the fact that sex and gender-disaggregated data is currently limited highlights how critical it is that gender is paid more serious attention. Without adequate data it is difficult for policy makers, researchers and development practitioners within both developed and developing countries to fully comprehend, let

alone seek to improve, the actual lived experience of men, women, boys and girls living in poverty.

A second issue is that of determining *what kind of indicators* are needed. What are the tools for capturing quality changes in women's status and gender relations and the way in which they are achieved? It is well documented of the need to develop credible short-term indicators for progress towards long-term change but this is particularly challenging when cultural and social changes are often very slow. Indicators need to be both quantitative and qualitative; "[p]arity itself is not a sufficient condition for achieving the greater goal of gender equality" (UN 2005:18). Also, it is often not thought through against what criteria changes are to be measured (Brambilla 2001:9). For instance, should gender data for analysis be country specific or be comparable between countries or both? Within Australia, the journey towards refining indicators has already begun. In June 2006, the 'Symposium on the Harmonisation of Gender Indicators' aimed to stimulate debate across the sector on designing practical, useful and simple indicators to track progress towards gender equality, the "heart of aid and development" (Crawford 2006:8). In alignment with the Paris Declaration, indicators need to be developed with the partner government to ensure ownership and acceptance. Thus it is critical that the gender adviser uses a participatory approach to develop culturally and socially relevant indicators of progress towards gender equality (Brambilla 2001:9). Capacity within recipient countries for the collection of sex- and gender- disaggregated data also needs to be developed. This includes local staff having a good level of understanding of gender equality concepts, being able to travel, asking the right questions at the right times (DFID 2007a:4), and regularly gathering and following up information. Training itself is not enough as there also needs to be ongoing mentoring, which requires sufficient resources to have qualified people to effectively do this.

Further issues include building capacity within recipient countries for *qualitative gender analysis* at all stages of the program cycle. Undertaking qualitative gender analysis is the ability to "understand social processes, why and how a particular situation measured by indicators has taken place and how much a situation can be changed in the future" (Brambilla 2001:3). Capacity to *manage gender data* is another critical area for considerable attention. It is essential for gender data to be integrated with the development initiative or program's Management Information System (MIS). An interesting current development is the launch of Gender Indicators Online (GIO), the "first web based gender disaggregated database of its kind at the state level in Australia" (Sharp 2006:90 – 93). Its developers claim that it could be used within recipient countries as a gender-focused MIS because it is simple and relatively cheap to establish and maintain (Sharp 2006). Key issues of course would involve ensuring adequate training and maintenance of the database for it to be effective. A further issue is developing capacity for *applying knowledge gained in a practical way* as well as in transferring this knowledge to others. Whilst training may increase awareness of gender issues relevant to the activity being implemented, trainees still may not know how to translate their knowledge into action. Ongoing support from gender advisers is required to mentor project staff and stakeholders in how to develop specific and targeted action plans.

Gender mainstreaming to date has generally not worked due to it being everyone's responsibility and yet no-one in particular is accountable nor committed. **Accountability and political commitment**, in both recipient and donor countries, are essential for ensuring gender equality indicators are integrated and attained. Addressing accountability is to reduce the gap between policy and application; it is to clearly define who is responsible for integrating and addressing gender equality considerations at every step of the process. Even though it should be everyone's business to ensure gender is taken seriously, someone must ultimately be responsible. For instance by including targeted and specific responsibilities for advancing gender equality in a person's ToR; tasks should be practical and immediately applicable to the job (Hunt 2007). A concern with performance-based gender-sensitive indicators is that the program management group may be motivated to support gender integration due to their being assessed on whether they encourage and enable it; however this does not equate with having an accurate understanding of gender issues within the specific initiative context. Commitment to and actioning gender equality is essentially demonstrated by appropriate financial and human resources for gender mainstreaming at all stages of the development process. Without resources for the time consuming and challenging process of integrating gender considerations throughout the program cycle, gender equality is likely to be neglected. The "how to" is essentially a political challenge and requires development practitioners to effectively promote gender equality to be consistently included on the agenda. This will involve having the "right kind" of adviser who is up-to-date on gender theory and practice, has political savvy, is an effective communicator and commands the ability to **influence** his or her audience.

Whatever the indicator and no matter how much training and mentoring is provided, development practitioners need to be patient as **cultural and individual attitudinal changes are complex and slow**. Careful and thorough gender analysis that incorporates cross-cutting issues such as culture, age, geography, politics, may reveal that key actors to target and influence may not have been identified if the analysis was rather superficial in the first instance. For example, women themselves may be obstacles to advancing gender equality. Well educated, urban women holding government positions may not have a realistic understanding of the actual situation of rural women living in poverty and may not be able to appreciate the interconnectedness of gender equality and economic advancement. Ironically, a fundamental issue undermining the successful integration of gender equality considerations into the whole aid and development initiative/program cycle may be caused by donor countries themselves. The **culture within donor country** government agencies, research institutions and the private sector may not be conducive to exemplifying good practice in addressing implications of policies, initiatives or projects on the advancement of gender equality. This is problematic for study tours and delegations from recipient countries to the donor country as it either sends conflicting messages or perpetuates gender considerations being kept in the periphery. Managing contractors of aid and development programs can have a key role in facilitating, through the program team, discussions and demonstrations exemplifying how gender equality concepts can translate into action and results.

However, further research is necessary for a deeper understanding of the country-specific contexts of these challenges and to explore in greater detail practical and appropriate approaches within individual country contexts. These fundamental challenges need



considerable resources and ongoing investment to enable quality data for evaluating the social impact of development initiatives.

## **Conclusion**

At the heart of aid and development, “gender equality and women’s empowerment is a political issue needing a political response” (DFID 2007a:2). For positive change to occur, the new architecture for donor assistance needs to include: (1) gender-sensitive indicators embedded within accountability and monitoring systems for recipient and donor governments so that performance and progress towards contributing to gender equality results are measured and tracked; (2) political commitment by and mobilisation of change agents at all levels within recipient and donor country institutions and organisations; (3) technical capacity for change; and (4) sufficient financial resources for activities specifically addressing gender issues (UN 2005:2; 20-21). Through the formal integration of clear and practical gender equality and women’s empowerment considerations into M&E frameworks and management information systems, useful and appropriate data can be collected and used to support a case in point when lobbying for change. Indeed, there are opportunities for collaborative research between gender and M&E specialists to review and refine existing methodologies and tools. Furthermore, by incorporating realistic and practical gender considerations at every step of the program cycle, it makes it easier for all development partners to clearly understand the logic for what quality change needs to occur to advance gender equality and why.

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*A special thank you goes to my colleague, Fiona Hanrahan, for her time and contribution to the discussion of the issues and ideas raised in this paper.*