

Mainstreaming disability in
development:
Lessons from gender mainstreaming

Carol Miller and Bill Albert

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LIST OF ABBREVIATIONS

ADD	Action on Disability in Development
AWID	Association of Women in Development
CDF	Comprehensive Development Framework
CIDA	Canadian International Development Agency
CSCF	Civil Society Challenge Fund
CSO	Civil society organisation
CSP	Country Strategy Programme
DBS	Direct Budgetary Support
DFID	Department for International Development
DPO	Disabled people's organisation
ECOSOC	Economic and Social Council (United Nations)
EDF	European Disability Forum
ERJ	Equality, Rights and Justice Team, Policy Division (at DFID)
DFID	Department for International Development
EU	European Union
GAD	Gender and Development
ILO	International Labour Organisation
KaR	Knowledge and Research
KIPAF	Knowledge-Inclusion-Participation-Access-Fulfilling Obligation
MIUSA	Mobility International USA
MDGs	Millennium Development Goals
NGO	Non-government organisation
NORAD	Norwegian Agency for Development
ODG	Overseas Development Group
PPA	Partnership Programme Agreement
PRSP	Poverty Reduction Strategy Paper
RHA	Rapid Handicap Analysis
SIDA	Swedish International Development Agency
STAKES	National Research and Development Centre for Welfare and Health
SWAP	Sector-wide approach
UN	United Nations
UNDP	United Nations Development Programme

USAID
WID

United States Agency for International Development
Women in Development

Introduction and background

At an international conference held in London in November 2003 disabled delegates from more than 20 countries made a strong call for disability to be mainstreamed in development. It was argued that this was not being done despite many promises from various governments and international agencies. Furthermore, “Delegates with day to day experience of struggling for disabled people’s rights at the grassroots felt very strongly that the present invisibility of disability in development is degrading and unjust, furthers exclusion and violates disabled people’s human rights” (International Service, 2003).

Such observations and demands for change have been made by the international disability movement since its formation in the early 1980s. However, it is only within the last few years that the idea that disability must be approached as a fundamental human rights issue has begun to make a significant impression on governments and international development agencies.¹ Unfortunately, it remains primarily just that: an impression. Despite fine-sounding pronouncements, disability in development remains trapped, for the most part, in the ‘special needs’ ghetto of targeted projects concerned with health, education and welfare. It has not found a home in the development policy and practice mainstream (Albert, 2004b).

That disability finds such a home is an essential first step to addressing the social exclusion and extreme poverty that affects the vast majority of the hundreds of millions of disabled people in the developing world. In 2000, the UK Department for International Development (DFID) published an issues paper on disability, which recognised this problem (2000a). One of the measures it called for was to bring disability into the mainstream. However, research carried out four years later that mapped disability initiatives within DFID found that although there was a substantial number of ‘disability-focused’ projects:

“... there is little practical evidence that mainstreaming has taken place and disability has hardly registered at all in the development process” (Thomas, 2004:70).

¹ The arguments for why disability is a human rights issue, the extent and links between poverty and disability and why mainstreaming is necessary will not be addressed in this paper, as there is an extensive literature on the subject. For one of the best and most succinct treatments see EDF (2002).

In another report produced in the same year, it was pointed out that:

“The overarching mission of DFID is to assist developing countries to achieve accelerated and irreversible reductions in poverty. Mainstreaming disability issues in development is an integral component of that mission” (Ortiz, 2004:4).

It is clear that for DFID, in common with almost all similar agencies, there remains a great deal of work to do before disability begins to be actively or effectively mainstreamed in development policy let alone practice.

One of the points frequently made by advocates for mainstreaming disability in development is that disability needs to be treated by both agencies and governments in developing countries as a cross-cutting issue, in much the same way that gender has been. At the moment no national development agency has done this. However, ideas drawn from the experience of gender mainstreaming are often cited and in other instances it is clear that that policies and proposals on disability have been informed by gender mainstreaming (see NCD, 2003).

Nonetheless, to the authors' knowledge, no one has considered in detail what the real lessons are that can be learnt from gender mainstreaming – what has and has not worked, where there have been problems and why – and how these might be applied or perhaps should not be applied to developing policies and practices of mainstreaming disability. We feel this is an important area to explore because even though gender mainstreaming only became a widely adopted strategy from the mid-1990s, there is both a wealth of experience in its practical application and a substantial critical literature.² In contrast, while there has been much written by activists promoting and agencies promising a human rights approach and disability mainstreaming, there is very little, if anything substantial, to look at in terms of practice.³

² This paper has drawn on the wide-ranging literature from the past decade documenting lessons and good practice in gender mainstreaming across different types of development organisations. In particular see the Gender Manual produced by Derbyshire (2002) for DFID. A comprehensive assessment of gender mainstreaming will form part of the 10-year review of the implementation of the Beijing Platform for Action in March 2005 at the 49th session of the Commission on the Status of Women.

³ See for example the report by STAKES (2003) which tells how researchers found that Finland, which has one of the most progressive disability and development policies, had not mainstreamed disability and most projects still reflected a social welfare rather than a human rights approach to development.

In this paper we use the experience of gender mainstreaming as a lens through which to view and reflect on some of the proposals for mainstreaming disability in development. We hope that this will help inform what is happening or planned on disability by the principal international development agencies. With respect to DFID, the principle focus of our attention, we intend to form recommendations as to how lessons from its own as well as others' experience of gender mainstreaming can be applied most effectively to disability.

Of course, there are important differences between gender and disability. One of the most striking, particularly with respect to policy formulation, is the question of physical and communicative access. Besides the practical problems this can pose, it also demands that discrimination and exclusion are conceptualised in a radically different way, mainly by seeing the environment as the key discriminating and, therefore, disabling element. This in turn is based on rejecting some widely accepted ideas of normality and embracing disability as a 'normal' aspect of the human condition.

Despite these and other differences between gender and disability, the commonality of a human rights perspective and fundamental concerns about discrimination and inequality, as well as many other convergent aspects that inform both projects, make this an exciting and protean set of topics for closer investigation.

Tales of mainstreaming and of not mainstreaming

The Beijing Platform for Action from the Fourth United Nations World Conference on Women in 1995 established gender mainstreaming as a major global strategy for the promotion of gender equality. The Beijing Platform for Action stated that:

“governments and other actors should promote an active and visible policy of mainstreaming a gender perspective in all policies and programmes so that, before decisions are taken, an analysis is made of the effects on women and men respectively” (UN, 1995).

Six months earlier at another UN conference, the World Summit on Social Development, in Copenhagen, the international disability movement presented a report (DDA, 1995) that called for, among other things, the involvement of disabled people at all levels in the process of social development. While the term 'mainstreaming' was not used, the demands, grounded firmly in human rights and disabled peoples' participation, amounted to very much the same thing. Unlike the success achieved by women, not only were these demands ignored (see Hurst, 1999: 29), but disabled people were in effect excluded from full participation in the meetings due to lack of access to buildings, transport and communication. The gap between the recognition achieved by the two movements could not have been more starkly demonstrated.

There are a great many reasons for this difference: for one, the feminist movement has a much longer history, a much larger constituency and a far stronger voice. Also, and most importantly in this comparative context, it had broadly won the argument that the inequality experienced by women has its roots in society, not biology. While progress has been made, the disability movement had then and still has to win that argument. Until it does it will continue to be difficult to convince policy makers that disability is a human rights issue and disability mainstreaming an effective strategy both to reduce poverty and achieve equality in development.

To understand the implications of these differences, as well as why the concept of mainstreaming has become so central to development discourse, it is useful to briefly outline the history of feminist advocacy with respect to development.

From women in development to gender and development

It is estimated that prior to 1975, the UN's International Year for Women, less than one per cent of standard textbooks on development referred specifically to women. Development was about men, by men and for men (see Kabeer, 1994:xi). Essentially, the problem was that policy makers simply did not 'see' women. The exception was social welfare programmes that targeted women as mothers (e.g. food aid, nutrition and family planning).

Gender refers to the socially determined differences between women and men, such as roles, attitudes, behaviour and values. Gender roles are learnt and vary across cultures and over time; they are thus amenable to change. Gender is a relational term that includes both women and men. Gender inequality focuses on changes for both women and men.

The first phase of feminism within international development agencies – a product of advocacy from activists, researchers and practitioners – sought to make women visible and to ensure that they were integrated into existing development initiatives. This has come to be characterised as the Women in Development (WID) approach. There was a strong conviction that if planners and policy makers could be made to see women's valuable contribution to the economy, women would no longer be marginalised in the development process. This instrumentalist approach, based on arguments about economic efficiency, proved to be effective as a political strategy for having women's issues taken up by donor agencies. The result was that development conferences scheduled workshops on women, there was new research on women's participation in productive work, some institutions set up women's desks, checklists were developed to ensure that women's concerns were included in projects, and small-scale income-generating projects targeting women abounded.

Shortcomings of the WID approach soon became evident. Not only was WID failing in its own terms – most income generating projects failed to generate sufficient incomes – but it also left the mainstream of development untouched, commanded marginal budgets, treated women as a homogeneous group, and failed to look systematically at why and how women were disadvantaged. Drawing on Marxist analysis, feminist scholars and activists also criticised WID for its failure to account for the fact that women were *already integrated* in the economic system – but in ways that perpetuated their position of subordination. Most significantly, in placing an undue emphasis on what women could contribute to economic development, demands for social justice and equality became secondary.

The Gender and Development (GAD) approach emerged in the 1980s and early 1990s as a response to some of the failings of WID. The GAD approach shifted the key focus of analysis in development to the *power relations* between women and men. The problem with the WID paradigm, which saw women as the analytical category for addressing gender inequalities in development, was that it led to a focus on women in isolation from the rest of their lives and from the relationships through which such inequalities were perpetuated. The implication was that the problem – and hence the solution – concerned only women.

To counter this there was growing recognition that barriers to equality for women are for the most part *socially constructed*, maintained by a

complex array of historical, ideological, cultural, economic and religious influences. The shift to a relational analysis of gender inequality within the development process has had far-reaching implications. It has not only highlighted the institutionalised basis of male power and privilege within the domestic sphere of families and households but has also uncovered its operation within the purportedly neutral institutions within which development policies are made and implemented.

An important contribution of the GAD approach has been to draw attention to the profound impact on women of supposedly gender-neutral development policies (e.g. Structural Adjustment Policies) aimed at society as a whole. The GAD approach has also revealed ways in which development organisations themselves reflect and perpetuate gender inequalities in their staffing and culture – not least in relation to the universal marginalisation of women’s units and projects. At the same time, drawing on feminist activism, gender analysts have explicitly identified women as *agents of change*, rather than solely as beneficiaries of development projects, and have stressed the importance of women organising to bring about change. This aspect of the GAD approach dovetailed with the shift to rights-based approaches to development.⁴

From the point of view of the disability movement, there is a clear parallel with the GAD paradigm in terms of understanding disability as socially constructed and resulting from barriers to equal access, the need for a human rights approach, the importance of disabled people empowering themselves to be actors rather than subjects, and the reality of unequal power relationships across the entire spectrum of development work, from policy to practice. These were very much the starting points for the movement in the 1980s (see Disabled Peoples’ International, 1985).

Disability results from the interaction of impairment with social, attitudinal and physical barriers preventing equal participation in community life. Disability is the result of discrimination and social exclusion. It is a human rights issue that demands a socio-political rather than a health-based focus for ameliorative policy and practice.

In 1993 these ideas received official recognition with the promulgation of the UN’s The Standard Rules on the Equalization of Opportunities

⁴ This discussion on WID and GAD is drawn from several sources: Moser, 1993; Kabeer, 1994; Razavi and Miller, 1995a; WEDO, 2002.

for Persons with Disabilities (UN, 1993), especially rules 21 and 22 which read like a blueprint for mainstreaming disability. However, the rules were not binding, few resources were made available to support the project and consequently the movement's ideas got little further than this collection of hopeful words. In fact, virtually all development projects with a disability focus are still concerned overwhelmingly with health, special education, impairment prevention or social care. This is despite the relatively recent popularity of disability mainstreaming as an idea, a growing number of detailed proposals and check lists for its implementation and the resounding declarations by such high profile figures as the chairman of the World Bank about the importance of tackling disability to achieve Millennium Development Goals of poverty reduction. To this extent, such development projects have more in common with the WID than the GAD approach in that they leave the mainstream of development relatively untouched.

Mainstreaming to achieve equality

Although there have been a number of proposals for mainstreaming disability in development, which are outlined below, none contain a clear, concise definition of precisely what it means. For this we must turn to gender mainstreaming, which emerged as a strategy to incorporate many of the insights of the GAD approach outlined above. Since it was adopted in 1995 as the official global strategy for promoting gender equality, there has been considerable debate about what gender mainstreaming means. Nonetheless, the following definition is widely accepted by development organisations and governments:

“Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies and programmes, in all areas and at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality.” (ECOSOC, 1997)

This definition can easily apply to disability mainstreaming, is implicit in most writing on the subject, and is the working definition used in this paper. It is important to note that mainstreaming should not be

seen as an end in itself, but rather a strategy to achieve gender or disability equality.

Disability equality is another concept that is usually not spelled out. As with mainstreaming, its meaning too is often contested. It begins with the understanding that disability is socially constructed (see Albert, 2004a). This does not mean that impairments are unimportant, but only that while they can be extremely difficult for individuals, for any population they are normal. In fact, the greater the level of economic development, the more normal they become, as there is a strong positive correlation between levels of economic development and the proportion of disabled people in the population⁵. To achieve disability equality therefore means removing the social, cultural and environmental barriers that violate disabled peoples' basic human rights by preventing them from playing a full and equal role in society. It is important here to distinguish the social-model, which is a conceptualisation of disability, from the human rights approach, which is strategy for dealing with the discrimination and social exclusion faced by disabled people.

All too often, however, while development agencies claim to be adopting a human rights framework, disability, together with disabled people, tends to remain locked in the specialist world of medicine and rehabilitation because it is so firmly imagined by most people as concerning abnormality and functional limitation. This in turn makes a genuine human rights approach and the mainstreaming of disability virtually impossible to deliver, as policy makers and practitioners too easily default to an individualist, medical model of disability. As the EDF makes clear:

“Preventing impairments through vaccinations, eliminating diseases that cause impairment and improving birth practices does nothing to improve the human rights of disabled persons already living. It is much more about creating the optimum level of health and safety in a society, rather than about including a disability dimension into development. As the term ‘inclusion’ becomes more popular, there is a

⁵ Comparable statistical data is lacking, but it appears that in general the proportion of disabled people in the developed world is many times that in the developing world. For example, in the 1980s the UK reported 14.2% of the population over 16 as disabled, while in Nepal and the Philippines it was (for all ages) 3% and 4.4% respectively. However, this is based on completely unreliable data that is useless to any serious analysis. See UN, 1990.

tendency for agencies to claim that they are including disabled people in relation to any project that mentions disability. For example, the World Bank list of projects on ‘Including Disabled People in development’ lists many projects that are basically about preventing impairment, and is not about inclusive development” (EDF, 2002:11).

The importance of establishing shared understandings of key concepts – not to mention goals – should not be underestimated. In the case of gender mainstreaming, textbook definitions of the concept of gender are fairly common currency in international development institutions. Yet even as the Beijing Conference declared gender mainstreaming as the official global strategy, the question of what happens to gender as it is institutionalised was the subject of fierce debates.⁶ For example, it has been observed that:

“Although the gender discourse has filtered through to policy-making institutions, in the process actors have re-interpreted the concept to suit their institutional needs. In some instances, ‘gender’ has been used to side-step a focus on ‘women’ and the radical policy implications of overcoming their disprivilege” (Razavi and Miller, 1995a:41).

These comments are similar to the concerns raised that the original insights of the GAD approach (drawing attention to power relations and women’s subordination) are often lost in the process of institutionalising gender, where de-politicised and technocratic approaches are favoured and where gender has come to mean ‘a focus on both men and women’ (ignoring the power relations between them and the reality of women’s position of inequality) (see Miller and Razavi, 1998; Baden and Goetz, 1998).⁷

There has been much written on discursive strategies used by those advocating for policy attention to gender within development organisations – with particular emphasis on how arguments for

⁶ See Baden and Goetz (1998) for an analysis of discourses around gender. These are currently being revisited as part of the Beijing+10 review process. See AWID report (2004a).

⁷ Much important work has been done in recent years to address how men are negatively affected by gender roles and ideas about masculinity – and how these impact on power relations between men and women. However, some are concerned that this has unintentionally resulted in diverting attention and resources from work on women’s rights and equality for women (see AWID, 2004; Win, 2004).

attention to gender equality are redefined in relation to shifts in development discourse itself. In recent years, the shift to rights-based approaches – and with this an emphasis on women as rights-holders – has provided greater scope for reasserting gender equality and women’s rights as the goal of gender mainstreaming and for bringing gender power relations to the centre of the analysis of women’s experience of discrimination, exclusion and denial of rights.

With regard to the above, two practical observations can be made for disability mainstreaming. First, it is important to continue to track how key concepts are used as they are taken up by development agencies and to ensure that they advance rather than hinder the goals set out. Second, it is necessary for mainstreaming strategies to include mechanisms for ensuring that an organisation and its staff are clear about key concepts and can put them into practice in their day-to-day work. This is one of the central challenges of mainstreaming.

Proposals for mainstreaming disability in development cooperation

Although there are many declarations, proposals and policies for addressing disability in development, until recently there have been relatively few that have detailed what needs to be done to mainstream disability in practice. In 1996 STAKES produced a checklist developed in Finland, as part of a manual on inclusive development practice for the UN, to help assess whether development projects included an adequate disability dimension. This has been since updated a number of times, but seems not to have been widely used even in Finland (STAKES, 2003:71-74). Furthermore the checklist is a technical tool more suitable to be applied to projects after they have been designed. Mainstreaming, on the other hand, seeks to build in disability issues from the beginning of the process.

The National Council on Disability (NDC), in its critique of United States disability policy abroad, has set out a series of detailed recommendations for mainstreaming disability into foreign policy and development assistance (NDC, 2003). In doing this it draws, in part, on USAID’s experience in gender mainstreaming and has made some excellent observations about the lessons that might be learnt, which are explored below. While these, as well as the ideas for mainstreaming disability, relate specifically to US political and legal structures, there are many suggestions for promoting disability issues that would be useful for any development agency.

Probably the most comprehensive review of disability mainstreaming has been offered by the European Disability Forum (EDF, 2002).⁸ It makes a compelling case for mainstreaming, reviews disability policies from many of the major development agencies and offers detailed recommendations about how disability should be mainstreamed into policy and practice. It is clear that much of this is based on gender mainstreaming. The same is true for more agency-specific mainstreaming ideas proposed by Isabel Ortiz (2004:9-15) for different activities carried out by DFID (country programming, country interventions, within DFID itself and research). However, while gender mainstreaming has, therefore, been used explicitly or implicitly as a template for disability mainstreaming, with the exception of the few insightful comments in the recent NDC report, there has been no critical engagement with the actual experience of the former in relation to the latter. This is what we hope to begin to do in here.

Interlocking spheres of mainstreaming

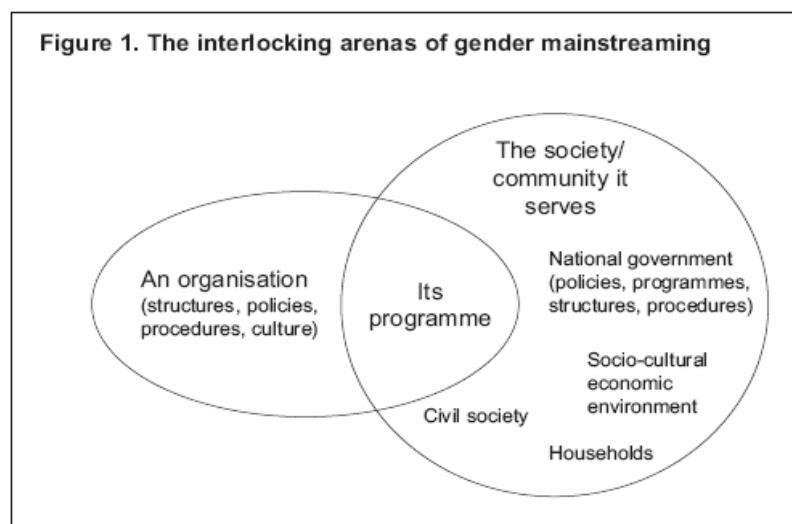
Mainstreaming in development cooperation is an intricate process that takes place across a number of distinct but interlinked realms of activity. To make sense of this and provide a practical guide to implementation it is useful to disaggregate the various realms and consider what specific strategies or interventions are appropriate for each one. Such an approach has been suggested by the Swedish International Development Agency (SIDA) (Shalkwyk et al, cited in Murison 2002). As elaborated on below, the three interconnected spheres in which mainstreaming takes place are:

1. at the level of the agency itself with respect to its culture, policies and practices
2. within the agency's programmes
3. within the output, following through – making good – with the promise of improving equality. (This is the most significant.)

It has been pointed out that:

“At times strategies and assessments have tended to blur these three arenas, and have often lost sight of the fact that change in the third level is the final goal... It is important not to conflate these three arenas, as different strategies and indicators of change apply to each” (Murison, 2002:2).

⁸ The EDF Policy Paper fed into the European Commission, DG Development, *Guidance note on disability and development for EU delegations and services*, 2003.



We propose to use the schema in Figure 1 above as a heuristic device to structure our analysis and tease out what those advocating disability mainstreaming can learn from the experience of gender mainstreaming.

Mainstreaming at the organisational level

Papers exploring areas for disability mainstreaming have highlighted a number of possible actions at the organisational level.⁹ These include, for example: development of disability policy and/or strategy; clear allocation of roles and responsibilities; a department to promote and monitor disability policy; human resources practices that create a disability-friendly and accessible environment; disability awareness-raising and training; consultation with disabled people and disabled people's organisations; approaches to capture shared learning and good practice; and appropriate resource allocation. All are consistent with areas that have been part of the repertoire for gender mainstreaming across many international development organisations. While there is insufficient space for a discussion of each of these themes, we highlight some key lessons from gender mainstreaming where the parallels appear most relevant.

⁹This paper's analysis of the recommendations/ideas about disability mainstreaming draws primarily on Ortiz (2004), which is DFID specific, the NCD Report (2003) and the EDF Report (2002), which looks more broadly at development cooperation in the European Union. It also draws on insights emerging from Thomas (2004), which includes a SWOT analysis of DFID and disability that highlights gaps across the organisation consistent with some of the main areas identified for disability mainstreaming by the other papers – though the suggestions for taking disability mainstreaming forward provided by the paper focus mainly on work in the Policy Division.

It is worth noting at the outset that the emphasis placed on mainstreaming gender at the organisational level (e.g. organisational structures, procedures and culture) emerges from a long struggle to integrate equality issues at the programmatic level (e.g. country strategy papers, sector strategies, PRSPs, SWAPs, technical assistance). Evaluations have consistently drawn attention to the ‘evaporation’ of policy commitments to gender equality in the planning and implementation processes as a result of inadequate management procedures and the lack of commitment, understanding and skills among staff.¹⁰ There is now greater awareness that effective management and implementation of initiatives to promote gender equality at the programmatic level requires actions to develop staff commitment, understanding and skills, as well as actions to promote greater gender equality within development organisations themselves.

Lesson One: A clear mandate on disability and development

Lessons from gender mainstreaming within international development institutions suggest that a clear mandate – usually in the form of a gender policy – is essential for pinning down otherwise vague statements about an organisation’s commitment to gender equality and for sending out a signal to all staff that the issue is taken seriously. A gender policy can also be an important reference point for those, whether inside or outside an agency, wanting to ensure that the organisation is held *accountable* for its commitments. It is important to note that for each institution there may be a specific type of document that provides a clear enforceable mandate for working on an issue – here we use the term ‘policy’ as a shorthand for this.

Good practice guidelines suggest that a gender policy should:

- be a succinct statement of the organisation’s commitment to gender equality;
- lay out evidence of gender inequality, drawing on relevant gender analytical information and sex-disaggregated data;
- explain why gender inequality is an obstacle to the achievement of the organisation’s principles and mission;
- work to address gender inequality both within the organisation as well as externally in programme work; and
- be articulated at the highest level.

Unfortunately, in many organisations gender policies have remained ‘trapped on paper’. For this reason a distinction should be made

¹⁰ For discussion of ‘policy evaporation’ see Derbyshire (2002).

between a 'policy' and a 'strategy'. A strategy outlines the approach that will be used to achieve whatever goals or commitments have been made in the gender policy. It is a description of how the gender policy will be implemented. A strategy should be: time bound; specify 'who, what, when and how'; use clear and precise language; and be feasible and achievable. Emphasis needs to be placed on the importance of developing indicators for tracking progress and of linking regular review of the gender policy to other organisational monitoring and evaluation processes (Derbyshire, 2002).

Almost everything outlined above is missing if we consider disability policy and strategy at DFID. For example, the Issues Paper *Disability, Poverty and Development* is just that – an issues paper, and not a 'policy statement' on disability as it is sometimes seen outside DFID. The mapping exercise on disability issues in DFID noted the "nebulous" status of the Issues Paper, the absence of a policy on disability and the lack of a strategic approach to disability – the latter compounded by DFID's decentralised structure (Thomas, 2004:65).¹¹ It also pointed to perceptions among staff that disability was not a priority for DFID, in part because disability is not mentioned in the strategic planning documents. The mapping report does not come to any conclusion as regards the necessity for a disability policy/strategy for DFID, except to note that "DFID may wish to clarify the relationship of disability to its focus on poverty reduction and the achievement of the MDGs for its staff" (Thomas, 2004:71).

Ortiz, by contrast, recommends that DFID consider converting the issues paper into a policy/strategy paper and/or adding an action plan as part of a strategy to develop a policy commitment for disability at the corporate level (2004:11). Disability is currently included in the Human Rights Target Strategy Paper (DFID, 2002), whereas gender equality has its *own* Target Strategy Paper (DFID, 2000b). As for the EDF Policy Paper, it prioritises the development of a disability policy as a first step for mainstreaming and provides detailed information on what might be included in such a policy (EDF, 2002:19ff). It is important to note that while a mandate or a policy is crucial, unless it comes with time-limited targets and measurable goals, the chance of it being implemented is negligible.

At this juncture it is worth mentioning that DFID does not have a 'gender policy', nor does it have a programme or time-bound action

¹¹ Interestingly, the Issues Paper comes up in DFID publications search as a Target Strategy Paper, but does not actually have this status within DFID.

plan on gender equality and mainstreaming. A recent GAD Network review of gender equality and mainstreaming in DFID concluded that “lack of institutionalisation, reflected in the lack of *specific* systems and structures to ensure mainstreaming, is a key challenge to mainstreaming gender equality in DFID” (Macdonald, 2003:7). This assessment may have to be revised slightly due to the recent appointment of the Gender and Human Rights Adviser. Also, there is a MDG specifically on gender – “promote gender equality and empower women” (MDG 3) – which provides a strong case for working on gender in DFID, as well as a relevant Strategy Target Paper outlining strategies, priorities, actions and indicators for monitoring progress.¹²

There is clearly a need for an unambiguous mandate within DFID to mainstream disability.¹³ The EDF Policy Paper provides a useful ‘checklist’ of what might be included in a disability policy, although the distinction between policy and strategy used in gender mainstreaming would help to simplify and clarify the recommendations made. How this is to be done needs to be further explored, in particular taking into consideration some of the observations made by Ortiz, as well as the lessons that can be learnt from the experience of development agencies such as those in Norway, the USA and Finland, which have well articulated disability policies but continue to struggle with implementation.¹⁴

In all these cases a major problem has been a failure to communicate the policies throughout the organisation. For example, in a recent survey of Norwegian disability policy it was said that:

“A main finding of the review is that the guidelines were not known among the target group; not by the Norwegian Embassies nor by Norwegian NGOs or international NGOs that receive most support from NORAD/MFA (Ministry of Foreign Affairs)” (Hertzberg and Ingstad, 2003).

¹² Concerns are being raised, however, about the implications of the current focus on girls’ education (which is the proxy indicator for gender equality) on the mainstreaming of gender equality in the other MDGs/IDTs and more generally about mainstreaming gender beyond the education and health sectors. See Macdonald (2003) and Painter (2004).

¹³ DFID has developed a Diversity Strategy which emphasises staff recruitment. While having more disabled people working in the organisation may help ‘normalise’ disability as an issue, a clear disability policy that can be monitored remains a priority.

¹⁴ A more substantive study of the problems encountered in developing and implementing mainstreamed disability policies is the subject of an ongoing Disability KaR project.

Lesson Two: Robust institutional structures to promote a disability equality agenda

Over the past decade there have been many different institutional arrangements (gender staff, gender teams, horizontal gender advisory groups, gender focal points etc.) put in place to help support the mainstreaming of gender across an organisation (for example, to move from gender-specific projects alone to addressing gender equality in all sectors). At one level, the argument that gender equality is ‘everyone’s responsibility’ – a central tenet of the gender mainstreaming strategy – has proved double-edged. While this argument has been useful in raising the profile of gender equality across all departments/sectors, there have been negative consequences. In some organisations ‘mainstreaming’ has led to the shutting down of dedicated gender units with the argument that all staff members are now responsible for gender. Related to this, it has been difficult to make the case for staff and resources specifically allocated to the task of promoting gender equality. Indeed, there have been concerns that gender has been ‘mainstreamed out of existence’.¹⁵

It has become increasingly obvious that unless there are staff members with specific responsibility for gender equality, no one takes that responsibility. The current consensus seems to be that organisations need to take a twin-tracked approach with regard to institutional arrangements, including:

- mechanisms for ensuring that gender concerns are integrated throughout the organisation, as well as
- specialist gender units and/or gender focal points in order to avoid the marginalisation or ‘disappearance’ of gender issues.

To ensure that gender equality does become ‘everyone’s business’, explicit inclusion of gender equality needs to happen in TORs and recruitment practices as well as in competencies frameworks and performance appraisals. All this requires being specific about what responsibility for gender equality entails. Measures are best supported by an on-going approach to building staff capacity and understanding. *Individual* responsibility for gender equality needs to be reinforced by mechanisms to ensure *organisational* responsibility such as the explicit inclusion of gender equality in strategic and planning processes, including budgets.

¹⁵ This concern has been raised in many quarters (see UNDP, 2003; WIDE, 2001).

The exact role of specialist gender units/specialist staff continues to be a matter for debate, with different institutions adopting different models. There appears to be agreement, however, on the importance of a central gender mainstreaming unit with policy responsibility and a mandate to guide the overall gender mainstreaming process. Emphasis is usually placed on the need for gender units/staff to play a policy advocacy role within the organisation, to provide advice and to act as catalysts for gender mainstreaming across the organisation, rather than holding the overall responsibility for gender mainstreaming or for implementing specific programmes/projects.¹⁶

Within DFID responsibility for disability is spread across a number of departments and teams that work closely together. In the Policy Division disability falls under the responsibility of the Exclusion, Rights and Justice (ERJ) Team and the Gender and Human Rights Adviser, who is also a member of the ERJ Team. Disability is also part of the remit of the Diversity Adviser, who is part of the Human Resources Department. The Diversity Adviser's role is to look at institutional processes to ensure that diversity is developed within DFID's internal processes and reflected in DFID programmatic work. DFID also has a Disability Champion who is a Senior Civil Servant and a member of the top management group. In addition there is a Disability Working group whose members include senior staff from all key departments and programmes. There is also a Disability Policy Officer, located in the Policy Division, providing technical assistance on policy issues, but the position is temporary and the holder is employed by the Disability KaR Programme, not by DFID itself.¹⁷

In short, as the mapping report of DFID observes, "there is no focal point on disability", with at least one interviewee seeing this as a barrier to promoting disability issues in their work (Thomas, 2004:66). The disability agenda therefore depends on the efforts of informal networks, supportive individuals and temporary posts, and has not been institutionalised. Anecdotal evidence also suggests that the title 'Gender and Human Rights Advisor' causes confusion over the remit

¹⁶ Examples of the added value that can be provided by gender units/staff include: identifying and promoting gender equality issues related to the mandate of the organisation; supporting capacity building with regard to gender-based analysis, the collection and use of sex-disaggregated data and relevant research; establishing strategic alliances inside and outside the organisation, particularly women's groups. The good practice/lessons outlined in this section draw on: CIDA (2000); Derbyshire (2002) and Hannan (2004).

¹⁷ The authors are grateful to Philippa Thomas, Disability Policy Officer, for explaining the current roles within DFID. Personal communication, 18 February, 2005.

and gives rise to assumptions that the key focus is on gender equality.

DFID's difficulties in settling on an effective organisational home for disability are mirrored in other agencies. For example, even though USAID apparently has a Disability Policy Team, this was, in effect, one person working part time on disability with no additional funding. The National Council on Disability (NCD), judging this to have been ineffective, has recommended the creation of "... an Office on Disability in Development (DID) at USAID, similar to the USAID office on Women in Development, responsible for promoting the inclusion of people with disabilities in all USAID programs" (NCD, 2003). This is in line with proposals made by the EDF that agencies should appoint "...persons with specific responsibility for focusing on disability inclusion who have authority to influence decisions and budgets (not just advisors)" (EDF, 2002:20).

The NCD (2003) has argued that this alone is not enough, and has cautioned that:

"To avoid the problems of isolation experienced by the WID office over the years, and to promote the mainstreaming of disabilities into substantive programs of USAID, NCD recommends that the Disability in Development office be integrated into one of the largest substantive divisions or 'pillars' of USAID, such as the Democracy, Conflict, and Humanitarian Assistance Division, as this is where civil society issues are addressed."¹⁸

To some extent the latter recommendation has already been carried out at DFID by locating disability within the Exclusion, Rights and Justice Team. However, it is questionable whether such a 'team' matches the authority or organisational clout of a division within USAID and more importantly, the central problem of who is responsible for taking forward the disability agenda remains unresolved. As stated above, the lessons from gender mainstreaming

¹⁸ Following the recommendations from the NCD, significant changes have recently taken place at USAID. Besides the appointment of full-time disability coordinator, US\$2.5m have been earmarked for disability interventions. The coordinator must now seek to ensure that all USAID's projects, programmes and activities conform to the 1997 policy paper and access standards must be developed and applied to all USAID-funded construction projects. Furthermore, the coordinator reports directly to the Administrator (chief executive), which means that disability concerns will be directly communicated without having to go through layers of bureaucracy. (US Congress, 2005)

suggest that there need to be staff members with specific responsibility for pushing the disability equality agenda (both from the perspective of promoting disability across all areas of DFID's work and in relation to identifying appropriate entry points for disability-specific activities). Moreover, the linkages between mainstreaming disability internally (e.g. disability equality within DFID itself) and in its programmes cannot be achieved through the Policy Division alone (this is discussed further below).

Another lesson from gender mainstreaming is that while informal networks and supportive individuals are important, they cannot substitute for formal roles, structures, and accountability systems. This observation is reflected broadly in the recommendations made by Ortiz, which include the need to establish a clear division of labour across different departments and regional operations as well as creating specific disability posts.

Lesson Three: An organisational culture that is supportive of disability equality and staff that have the skills needed to mainstream disability

The literature on gender and organisational change puts considerable emphasis on the importance of transforming organisational culture in ways that are conducive to gender equality both within the organisation and in relation to programme work. According to some observers, "changing organisational culture so that gender equality is understood and accepted as a core value of the organisation is the only real guarantee of permanent meaningful change" (Macdonald, 1997:115).

Organisational culture: the informal processes that underpin how an organisation functions. This includes, for example: attitudes, behaviours, values, symbols, language, styles of communication, structure and management of meetings, work planning processes, informal networks and so on. It is sometimes described as 'how things are done around here'.

This is perhaps one of the most challenging and controversial areas of a gender mainstreaming strategy since it requires development organisations to address the fact that power relations are not simply something to be addressed 'out there' in programmes. For gender units/staff within organisations, bridging the gap between externally focused programme work and internally focused policies and procedures has often proved difficult, not least because of perceived

threats to professional credibility and backlash associated with highlighting gender inequalities within the organisation. In addition, gender posts have usually been located in policy and programmatic areas with their holders having little time to deal with and/or influence internal gender equality issues.

While most observers would agree that few, if any, development organisations have experienced the kind of transformation desired, there is now a more clearly articulated set of policies and strategies available to organisations wishing to create an environment more supportive of gender equality within the workplace.¹⁹ Some development organisations have even set targets for levels of women in senior positions as an indicator of gender equality within the organisation.

However, organisations seriously seeking to promote gender equality must also attempt to address the dynamic between formal policies (equal pay, recruitment, promotion, work-life balance, etc.) and more informal processes (attitudes, behaviours, values, styles of work, etc.). For example, formal policies for work-life balance will have little impact if the organisational culture is one where staff members are encouraged to demonstrate commitment through long hours or extensive travel abroad. Similarly, where the attitudes and behaviours of staff are sexist and/or racist, formal recruitment/selection or promotion policies will be difficult to implement and it will be difficult to retain a diverse workforce, not to mention plan and implement programmes that seek to promote gender equality. Attempts have been made to address these issues, which apply equally to disability, through gender awareness raising and training.

Training was one of the very first approaches used to promote gender mainstreaming and in some organisations, it has been the *only* strategy adopted. While gender training achieved much in terms of raising awareness about gender issues, its limits have also been recognised (Porter and Smyth, 1997). For example, gender training has often provoked resistance or has been ineffectual because it is formulaic and dislocated from the needs of the participants. Due to its importance not only for organisational culture, but also for making

¹⁹ For example, formal human resources policies in relation to gender equitable job designs and responsibilities; recruitment, pay and promotion; maternity and paternity benefits; performance evaluation; mentoring; protection from sexual harassment; flexible working; and a range of work-life balance. See Miller (2004b) on good practice on gender equality and diversity in the workplace, which focuses on current issues and good practice in the UK offices of international development organisations.

programme work more responsive to gender concerns, it is worth exploring some of the lessons of gender training over the past decade or more. Of course, although we are dealing with this at the organisational level, it is equally relevant at the programme and society/outcomes level.

The first point to make is that gender training alone cannot achieve the transformation of gender relations within an organisation, or gender equitable practice in its policies and programmes. It is most effective when used as part of a broader strategy, spearheaded and monitored by staff with designed responsibility for gender issues, for influencing the climate of opinion within an organisation and promoting gender equitable practice. Moreover, 'one-off' gender training, and/or gender training that is not complemented by the development of gender-specific policies, procedures, incentives, initiatives and support are largely ineffective (see Derbyshire, 2002). There is a need, for example, to understand the continuum between gender equality in job descriptions, gender training, performance appraisal systems and promotion.

Secondly, there has been shift away from 'one size fits all' gender training towards more targeted training to meet specific needs. Good practice guidelines (Derbyshire, 2002) now make a distinction between various types of training, for example:

- General awareness raising and communicating shared understandings about the meaning of gender, gender relations, and gender mainstreaming and the importance of gender equality to the organisation's mandate
- Knowledge and skills-building to understand gender differences and inequalities in relation to individual's work, and to plan and implement policies, programmes and projects to promote gender equality
- Sector-specific training (e.g. health, agriculture, economic policy), focusing on skills in gender analysis, collecting and utilising statistics, and developing, implementing and monitoring and evaluating projects
- Training that focuses on skills building for advocacy, lobbying and influencing techniques
- Training related to gender-equitable practices in the workplace.

There is also an awareness of the need to mainstream gender into other training (including management training) provided by an organisation in addition to stand-alone gender training.²⁰ Evaluations across development organisations, for example, have consistently revealed confusion over basic concepts. This in turn has signalled the importance of communicating a shared understanding of gender, gender equality and gender mainstreaming as part of broader organisational induction/training.

Thirdly, there is now a greater understanding that gender mainstreaming involves both the need for specialist expertise as well as equipping all staff with a level of understanding, knowledge and skills appropriate to their work. Related to this, it is no longer acceptable to assume that having a female staff member (who is often white, middle class, and from the North) involved on a team will ensure that gender issues are adequately addressed. The same point can be made about disability.

Experience has also shown that gender mainstreaming cannot be achieved by gender specialists alone. While they may have a sound general knowledge of gender equality issues, they are unlikely to have the skills required to support sector specialists in implementing gender mainstreaming in their particular areas (Hannon, 2004). Greater collaboration and stronger alliances between gender specialists and sector specialists, which build on the knowledge, experience and capacities of both, are therefore essential. And where sector-specific gender experts do exist, that would be all the better for the organisation.

On the issue of expertise, there is of course greater awareness of the importance of networking with and drawing on the knowledge and experience of women's organisations. With regard to disability, this has happened in many Scandinavian countries where the disability movement has worked closely with governments to devise disability policies and in some cases implement them in the South.²¹ This is also beginning to happen at DFID, with closer links recently

²⁰ Interestingly, DFID does not appear to have implemented the strategies outlined in its own *Gender Manual*. Gender training ended in 1997, at a time when the numbers of DFID staff were significantly increasing. A move to mainstream gender in all training courses has not been considered successful and as yet no decisions have been made about what approach should replace stand-alone gender training (see Watkins, 2004).

²¹ See for example the report on the 2000 Nordic Conference on Disability and Development Cooperation (Nordic Ministers for Development Cooperation, 2001).

established between the Department and the British Council of Disabled People. As described below, DFID has also recently used the expertise of the disability movement in the South to give direction to its research programme on disability and development.

Finally, over the past decade there has been a marked tendency for gender training to be treated as primarily a *technical process*, requiring only the teaching of analytical techniques and tools. This has often been a strategic choice made by gender staff to steer clear of earlier gender 'sensitisation' approaches attempting to explore experiences of gender roles and power relations (and often provoking resistance among staff). But the technocratic approach or 'winning minds' has often been at the expense of 'winning hearts' (Plantenga, 2004). The lesson has been that attitudinal change about gender equality – really establishing gender equality as a core value – is crucial in fostering the level of *commitment* needed for staff to begin to build their capacity, knowledge base and skills for gender analysis and gender planning. Attitudinal change is seen as the foundation for all the other strategies to mainstream gender.

The same is true for disability but here perhaps an even more fundamental change in staff attitudes is called for because of a commonly-held, very deep-seated assumption that disability is a medical/rehabilitation problem best left to 'experts'. Although this idea is now challenged in the official pronouncements of international agencies, many of which have recast disability as a human rights issue (Albert, 2004b), simply saying it does not change hearts and minds or, by extension, organisational culture. The equation is simple: the assumption that disability is about physical or mental deficit powerfully frames perception, understanding and then action. Clearly, if any issue is not correctly understood or properly identified, there is little chance of dealing with it effectively. This is a major challenge for development agencies, not only at the organisational level, but through all the three interrelated spheres of activity.

Interestingly, relatively little has been written about the question of organisational culture and what impact it may have on efforts to mainstream disability. An important exception is the research on British development-focused NGOs carried out by Rebecca Yeo (2003). She observes that:

"The most significant and overriding obstacle to disability inclusion is probably a lack of awareness, knowledge and experience of disability-related issues among the staff of

international development organisations... What is more surprising is that in so many organisations whose main aim is to tackle exclusion and inequality in different ways, so little effort is made to tackle this lack of disability awareness and to develop more inclusive working practices” (Yeo, 2003:7).

Recognition of this as a problem is implicit in recommendations for disability equality training made by the EDF (2002:29, 24) and Ortiz (2004:15), although the issue of organisational culture is not explicitly addressed nor is the precise nature of this training spelt out.²² The NCD (2003) observed that a principal lesson that needs to be drawn from studies of the Women in Development (WID) office in USAID was “...the difficulty of implementing gender policies by the pre-existing aid bureaucracies. These studies emphasized the importance of programs sensitizing USAID staff to promote the inclusion of new concepts into their work.”

Although the cases given below belong more in the programme sphere, the difference – identified with gender mainstreaming – between a technical approach to training and one that focuses on attitudinal change has been replicated for disability. For example, USAID has funded a training manual, produced by Mobility International USA, that is entirely technical in nature and contains almost nothing questioning attitudes towards or understanding of disability (Heinicke-Motsch and Sygall, 2004). Oxfam and Action on Disability and Development, on the other hand, have published a training manual firmly grounded in the social model of disability and taking for its starting point the need to address medically-based negative assumptions about disability and disabled people (Harris and Enfield, 2003). While this may simply be a reflection of different traditions, the lesson from gender mainstreaming is that it is the latter approach that is required in order to make a real difference to organisational culture and practice. Of course, this does not mean that specific technical competence is not required as well, but only that unless this is underpinned by a clear understanding of and a firm commitment to disability equality, such competence is in danger of becoming part of the problem instead of part of the solution.

Focusing more closely on DFID, Thomas in her mapping exercise attempts to capture staff knowledge about disability, particularly levels of understanding about different models of disability and perceptions

²² For a brief discussion of what disability equality training entails see Albert, McBride, Seddon et al. (2002).

of relevance of disability to DFID's poverty reduction agenda. She concludes that overall, "staff have broadly a good understanding of what disability is" (Thomas, 2004:67). The survey does not attempt to capture staff *attitudes* about disability and disabled people, nor the experiences of disabled people working within DFID. The mapping report does, however, highlight the importance of the legislative framework (the Disability Discrimination Act) for DFID's internal actions on disability, particularly in relation to employing disabled people. The report concludes that:

"...the DDA and DFID's Diversity Strategy in particular will have indirect influence in the future. For example, the DDA combined with a successful Diversity Strategy should encourage the recruitment of more staff with disabilities and encourage other staff to come forward and declare themselves as having a disability. Furthermore, disabled staff should find the barriers to their promotion removed. An increase in the number and status of disabled staff throughout the organisation will lead to greater visibility of disability issues and it will be harder for the needs of disabled people to be overlooked in DFID's planning and programme delivery" (Thomas, 2004:14).

Having a sound and monitored Diversity Strategy, implementing the DDA and having more disabled people employed would all be positive steps, but without paying attention to underlying assumptions and attitudes, these measures alone will not be sufficient to promote genuine disability equality and thereby transform DFID's organisational culture. Of course, this begs the question of the precise nature of that culture with respect to disability and to unpack this would demand a very substantial research effort. Interestingly, among the recommendations on disability set out in the DFID Annual Diversity Report is that it is necessary to "create a culture within DFID that makes people feel more comfortable about declaring their disability" (DFID, 2004a:6), though no specific strategies are detailed.

Specifically with regard to the Diversity Strategy, there are clearly opportunities for using this initiative to support disability mainstreaming across DFID. The priorities identified in the Strategy, for example, targeting "behaviour change" and "developing a culture of greater openness on sensitive diversity issues", suggest

opportunities for addressing some of the issues raised above.²³ Despite this, as we have observed, the broader implications for changes at the level of organisational culture and staff attitudes, while implicit in the reviews by Thomas or Ortiz, are not addressed directly and a clear action plan does not appear to be in place in DFID. More generally, it is worth noting that concerns about diversity mainstreaming voiced by gender advocates – that is, that specific strands of difference may get lost unless there are champions in place for each (Miller, 2004a) – also apply to disability equality.

Mainstreaming at the programme level

Murison refers to the organisation's programme as the "heart" of gender mainstreaming: "it is the arena in which commitment to gender equality takes concrete form" (2002:3). The shift from a focus on women specific projects to addressing gender equality within all areas of development work – one of the key objectives of a mainstreaming strategy – has required new research, skills and tools. Mainstreaming gender has involved making the linkages between gender equality and key areas of an organisation's work from sectoral activities to poverty alleviation strategies to the MDGs. Gender researchers and practitioners have worked hard over the past decade to respond to calls from programme staff across development organisations for more information, advice and tools for mainstreaming: in other words, for practical guidance on 'why' gender is relevant and 'how' to take gender to the mainstream of development. This has coincided with the need to respond to changes in the way in which international development organisations – bilateral agencies in particular – 'do development' (e.g. PRSPs, SWAPs).

One of the misunderstandings about gender mainstreaming – that mainstreaming made gender/women-specific projects redundant – has been addressed by the acknowledgement of the need for a twin-tracked strategy on mainstreaming: specific initiatives and programmes to address gender equality issues as well as actions to integrate gender into all development interventions. This notion of a twin-tracked approach is apparent in the background papers on disability mainstreaming and is made explicit in the DFID disability

²³ The *Annual Diversity Report* concludes that performance on disability "is disappointing" (measured against the Public Service Agreement (PSA) Senior Civil Service (SCS) targets). Other strategies to "develop the department's work on disability" include: "take steps to employ more disabled people" and "develop work on how DFID can address disability more actively in service delivery."

issues paper. The papers exploring strategies for disability mainstreaming place considerable emphasis on the need for more research and for practical guidance and tools for mainstreaming disability at the programmatic level. Again, while we cannot explore all the recommendations in detail, we comment here on some main areas where good practice in gender mainstreaming has been identified – and address some of the ongoing challenges for taking gender and disability equality to the mainstream of development.

Lesson Four: The need for policy-relevant research and information

One of the goals of feminist advocacy targeting development institutions over the past three decades has been to make women visible to policy makers through promoting rigorous analysis and research on women/gender and development. This has often involved demonstrating positive linkages between equality for women and the achievement of development goals (e.g. economic growth, adjustment, sustainable development, poverty alleviation, human rights). It has also involved challenging and redefining ways that data is collected for generating official statistics – most notably in relation to definitions of ‘work’.²⁴ A huge body of policy relevant research has been generated within research institutions, international development organisations and across government departments.

Above all, this body of research has provided advocates with information and statistics to make the case for gender equality in policy making circles. As Derbyshire (2002:23) observes:

“Gender advocates need to win allies and press their claims successfully against rival claimants. In an unsupportive context, the most effective course of action is to demonstrate positive spin-offs from gender mainstreaming, in terms that are compatible with the overall policy environment.”

Derbyshire highlights the following strategies that have been adopted to put gender equality on the agenda of development institutions:

²⁴ There was path-breaking work by the ILO in the 1970s and 1980s, for example, to assign a monetary equivalent to the bulk of women’s labour that falls outside the scope of economic statistics, as well as research on women’s participation in the ‘informal economy’. For further information see Razavi and Miller (1995b).

- Identifying appropriate ‘entry points’ from international, national, sectoral or organisational policy commitments to gender to generate new research findings, or analyses of sex-disaggregated data.
- Developing strategic alliances across organisations and recognising the need for compromise.
- Developing a well argued case for taking gender issues seriously, drawing on appropriate sex-disaggregated data and gender analytical information.
- Moulding arguments into a shape that fits the goals, culture, and procedures of the targeted organisation or process.
- Using language that is bold and appealing to policy makers and practitioners, quite different from the complexity of gender analysis.
- Making clear, well thought through and realistic suggestions for change. (Derbyshire, 2002:23)

All of the above is dependent on the availability of *sex-disaggregated data* and *gender analysis*. Sex-disaggregated data is quantitative statistical information on differences and inequalities between women and men: “it is the evidence on which the case for gender mainstreaming rests” (CIDA, 2000:32). Sex-disaggregated data provides the basis for gender analysis. Gender analysis is about understanding the patterns and norms of what men and women, boys and girls do and experience in relation to the issue being examined and addressed. Where patterns of gender difference and inequality are revealed in sex-disaggregated data, gender analysis is the process of examining why the disparities are there, whether they are a matter for concern, and how they might be addressed. It also points to areas for further in-depth research.

Gender analysis has been described as “the most important tool in the gender mainstreaming toolbox” (CIDA, 2000:32). Good practice suggests that gender analysis should be part and parcel of routine processes of policy and project appraisal and monitoring, gender analysis of beneficiary groups should be integral to social appraisal and monitoring processes, and gender analysis of development organisations themselves should be integral to institutional appraisal and monitoring (Derbyshire, 2002:14).

Many of these lessons may seem to be implicit in the recommendations for mainstreaming disability. For example, the EDF Policy Paper points to the need for connections to be made between

poverty, rights and disability in a disability policy and also calls for disaggregated data “not just according to gender, but also in relation to disability and age” (2002:20). However, this is hardly the same as formulating a ‘disability analysis’ corresponding to that outlined above for gender. The other major difficulty is that there are no reliable statistics on disability. In fact, we do not even have the most basic measure – how many disabled people there are in developing countries. This is not only a question of data collection, but also, and most crucially, how disability is defined (see Albert, 2004b:5-7). Such a fundamental definitional issue marks a most significant difference between disability and gender, particularly when considering the ability to devise criteria for collecting disaggregated data as well as the disability equivalent to gender analysis.

Ortiz prioritises the development of a DFID-specific tool linking disability and DFID poverty and human rights agenda, using the Knowledge–Inclusion–Participation–Access–Fulfilling Obligation (KIPAF) framework as a starting point (2004:17). The KIPAF framework is based on concepts from the social model of disability and seeks to address the cycle of poverty and social exclusion facing the majority of disabled people in an integrated manner (Ortiz, 2004:Box 3). However, without robust statistics and a clearer conception of the mechanics of a disability analysis, this may be seen as little more than another plausible relational model rather than hard evidence. This holds true for many of her recommendations for mainstreaming disability in country programming and development interventions that involve action research and studies on disability impact or justifying the case for inclusion of disability, for example in the case of SWAPs.

A similar gap was identified in consultations with staff in the course of the DFID mapping exercise. These revealed “a need for more data and analysis of the links between poverty and disability” and for “more guidance on disability issues particularly on their relationship with the MDGs and DFID’s focus on human rights and social exclusion” (Thomas, 2004:67). Thomas argues that “future work on disability will most fruitfully be done through an engagement with DFID’s internal policy debates on human rights and social exclusion”, though the modalities for taking this forward are not specified (2004:71).

One important way in which this is currently being taken forward (in 2005) is through a series of research projects on mainstreaming disability in development funded by DFID through the Disability KaR programme. This paper is one small part of that series. Also, besides

a substantial project detailing the linkages between disability and poverty, a number of topics have been identified and prioritised by disabled people in the North and South.²⁵ Most of these are being led by disabled researchers working together with Southern DPOs. This represents a unique departure in terms of identifying and carrying out research, as well as being perhaps one of the most ambitious research programmes on the subject funded by any national development agency.

The issues being researched include (see Disability KaR, n.d.):

- What further research needs to be done to facilitate mainstreaming disability in development within DFID and other development agencies
- The role of disability legislation and policy in developing countries
- How to collect disability-disaggregated statistical data,
- Why disability mainstreaming has not been implemented,
- Whether disabled peoples' voices are being heard in the development process
- What happens to disabled people in post-conflict situations
- How education is being provided for disabled children

There is no doubt that such policy-relevant research and analytical information are important both for demonstrating the linkages between disability equality and DFID's development goals and for identifying the most fruitful points for intervention. But research and statistics are only one part of the overall mainstreaming package. Research reports and data are likely to remain on the shelf unless there is a clear mandate for that information to be used and there are people with the responsibility for pushing the disability agenda.

If we consider the experience of mainstreaming gender in DFID, there is clearly no shortage of gender-related information available on DFID websites, on external websites partially funded by DFID and on websites hosted by other international development institutions. Despite this, the GAD Network review concludes: "The sporadic and inconsistent gender analysis found in many documents suggests that the existing high-quality work on gender is not sufficiently disseminated" (Macdonald, 2003:23). While the review points to specific issues regarding knowledge management that need to be

²⁵ This was done via a teleconference between disabled people in the UK, Finland, Fiji and South Africa and, most importantly, a roundtable meeting held in Malawi attended by representatives of DPOs in Africa, India and South-East Asia (see Disability KaR, 2004).

resolved, the broader challenge is the need to improve the overall institutional framework for mainstreaming gender (e.g. time-bound action plan, gender staff, human resources, capacity and training). This takes us back to the organisational sphere and shows that although it is useful to consider the three levels separately, in practice they can only work in concert.

Lesson Five: Practical, relevant guidelines and tools to mainstream disability

The background documents on disability mainstreaming refer to the need for more practical tools and guidelines (with some citing those that already exist for mainstreaming disability into development).²⁶ In this section, we consider the relevance and usefulness of such tools, drawing on lessons from gender mainstreaming where there are a multitude of guidelines and tools available for development practitioners.

Although it should be obvious, one key lesson from gender mainstreaming is that there are “different tools for different jobs” (CIDA, 2000:30). CIDA makes a distinction between “enabling tools” and “technical tools”. Enabling tools are “those that ‘pave the way’ for the entrenchment of the gender mainstreaming process” (e.g. policy/mandate, institutional structure and culture, policy relevant research, training). Technical tools for gender mainstreaming include “those employed for gender-responsive policy analysis, implementation, budgeting and monitoring/evaluation” (e.g. gender analysis, sex-disaggregated data, gender impact analysis, gender budgets, gender indicators, etc.). While technical tools are important, they should be seen as part of a broader mainstreaming strategy.

Over the past decade there has been an explosion of sector-specific gender guidelines and tools (e.g. health, water and sanitation, education, micro-finance, trade). There are also tools developed by different organisations for gender and participation, gender-sensitive programme cycle management, for gender monitoring and evaluation and gender audits. Despite this, practice indicates that many tools – including sector specific guidelines, manuals and handbooks – are often not being used effectively. There are many reasons for this: sometimes there is inadequate attention to dissemination so staff members are unaware of their existence; sometimes they are used

²⁶ EDF (2002) outlines various guidelines while Ortiz (2004:17) proposes KIPAF as a DFID-specific tool to mainstreaming disability.

more for PR activities outside the organisation than for internal capacity development; and many are over complex and not user-friendly. While in some organisations there has been a move to sector-specific training initiatives as a means of supporting the use of sector specific guidelines and tools, it is uneven. There is also more awareness that methodologies and tools which are developed in a collaborative manner, together with those who will use them, have the best chance of being used effectively and making an impact operationally (Hannan, 2004).

There are, of course, far fewer tools and guidelines for disability. Perhaps the most long-standing is the *Disability Dimension in Development Action: Manual on Inclusive Planning*, produced by the Finnish NGO STAKES for the UN (STAKES, 1996; 2000). This manual contains a Rapid Handicap Analysis (RHA), which is essentially a 10-point checklist "...to facilitate the rapid assessment of development programmes and projects for the adequate inclusion of the disability dimension in the plans." It is unclear how much either the manual or the RHA has actually been used, but a recent report suggests that even in Finland it has not been employed widely (STAKES, 2003:71-74).²⁷ It is instructive that the authors of the report also observe that, "... no technical and practice-oriented tool can help to make a better quality product from the disability perspective if the basic awareness, very basic knowledge and the right attitude are not there" (STAKES, 2003:73).

A similar fate seems to have burdened the detailed guidelines on disability and development cooperation produced by NORAD (2002). A survey done in 2004 concluded:

"There are no indications that the guidelines have facilitated the inclusion of disability issues. Only one of the respondents to the questionnaire indicated that it was found useful. In general it was not or very little known by the target groups" (Hertzberg and Ingstad, 2004:18).

They may not be a representative sample, but both the Finnish and Norwegian cases suggest that the main thing these guidelines are doing is gathering dust.

²⁷ This also contains details on the genesis of the manual and the RHA, the latter which has now been substantially revised, as well as an account of the testing of the RHA.

Furthermore, as more aid is pushed into budget-support-based instruments, these essentially project-focused tools may become of increasingly less practical relevance. This is a problem that may be addressed, at least in part, by the use of budgets focused on cross-cutting issues, one of the most promising innovations over the past decades employed to support gender mainstreaming.

Gender budgets are analyses of national (as well as regional and local) budgets to establish the differential impact of revenue raising or expenditure on women and men and on different groups of women and men.²⁸ They are designed to inform public policy debate, and as such are an important lobbying tool in making the national budgeting process more accountable from a gender perspective – to ensure that policy, programme and budget decisions take gender perspectives into account and that policies on gender equality are matched with adequate resource allocation. The focus of the gender budget tool reflects the needs imposed by the changing nature of development assistance. They have been used by some national-level women’s networks, for example, to influence the content and processes of the PRSP. The GAD Network has also recommended that DFID should consider applying gender budgeting analysis to development assistance channelled through direct budgetary support (Macdonald, 2003:19).

Lesson Six: Involving disabled people and disabled people’s organisations at all levels

Women’s participation is a key element of gender mainstreaming – it is also central to strategies being proposed for disability mainstreaming captured in the phrase “nothing about us without us” and in the following quote from NORAD:

“Disabled persons and/or their representative organisations must contribute with their own experiences in the planning of various actions, so that development becomes a process of persons with disabilities, and not something carried out by bureaucrats and ‘good-wishers’ alone as a process *for* disabled people” (2002:12).

²⁸ For specific gender budget tools and examples of ways in which they have been used, see the excellent cutting-edge pack on **Gender and Budgets** (BRIDGE, 2003).

Of course, such participation needs to take place in all spheres of mainstreaming in order to have the desired effects of genuine partnership in the development and ownership of policies, programmes and outcomes.

Gender mainstreaming has demonstrated that it is important to be clear about the purpose of participation, consultation or inclusion. Counting the numbers of a marginalised group that has been consulted or involved in projects is an important starting point but cannot substitute for concrete *actions* to address the priorities and *needs* they identify. It has been recently argued by the Director of the UN Division for Advancement of Women that one of the greatest challenges of gender mainstreaming is that it is often still seen solely “as increasing women’s participation” (Hannon, 2004:5).

Second, there has been greater awareness in recent years of the need to ensure that gender mainstreaming in general and strategies for enhancing participation in particular are attentive to the range of women’s views and needs in a community. One of the dangers is that in policy contexts ‘women’ are presented as a homogeneous group when in fact different groups of women may have different needs.

Intersectional analysis is being taken up by feminist theorists and women’s rights activists to examine every identity that women experience and to understand how these multiple, varied and layered identities intersect to produce discrimination and marginalisation.

Intersectionality is an analytical tool for studying, understanding and responding to the ways in which gender intersects with other identities (e.g. race and skin colour, caste, age, ethnicity, language, ancestry, sexual orientation, religion, socio-economic class, ability) and how these intersections contribute to unique experiences of oppression and privilege. (Awid, 2004b)

Indeed, one of the current challenges of gender mainstreaming is to find better ways of accounting for the diversity of women and for ensuring that diversity is addressed in relation to issues of participation and representation (e.g. grassroots organisations and civil society groups) (Miller, 2004a). This is of particular importance in relation to past failures by the women’s movement – and approaches to gender mainstreaming – to take into account the specific needs and experiences of disabled women.²⁹

²⁹ The shortcomings of gender mainstreaming with regard to taking into account the diversity of women is increasingly being recognised (see Riley, 2003)

The same questions arise when considering the role of organisations of disabled people. Like women, disabled people are a heterogeneous group, not only in terms of having different impairments, but also across the entire range of identity markers whether they be ones of gender, age, class, income, education, religion, location (rural or urban), race, and so on. These factors need always to be kept in mind so that different voices are heard and no section of the disability community is marginalised within that community.³⁰ However, it also must be remembered that it is generally discrimination and exclusion – the two things they share – that brings together disabled people in rights-based organisations. And it is drawing on this shared experience that is so critical in informing and shaping policies and programmes aimed at tackling disability as a human rights issue.

Third, as mentioned above, it is important to ensure that consultation happens at all stages of policy and programme development. This point is made clearly in the EDF and NORAD papers, which emphasise the involvement of and/or consultation with disabled people and disabled people's organisations in *all processes* from policy and programme development to project design to monitoring and evaluation – with the NORAD paper providing checklists on how to promote inclusion at various stages. The experience of gender mainstreaming suggests that consultation to enable women and men to identify their own priorities, needs and constraints is only possible in *organisations that genuinely value consultation* and the types of knowledge that it produces, and that allocate the necessary staff and budgetary resources to it (see Murison, 2002). This remains a challenge in many development organisations where rigorous research and quantitative data are more valued than qualitative research and information, and are resourced accordingly.

Fourth, and related to the above, it is important to think about consultation and participation at different levels. For many years, stakeholders' analysis and other tools for addressing the issue of women's participation focused on project level activities and improving women's involvement in community decision-making processes.

³⁰ This has been a key concern with regard to women and children and there is a substantial literature that deals with the multiple oppression experienced by these groups. Regarding gender and disability, see for example, Snyder (1999) and Sará-Serrano Mathiason (2000).

The importance of improving the representation of women within development institutions has also been highlighted in the context of strategies for participation (as discussed above). It is worth noting that the EDF Policy Paper places specific emphasis on the need to recruit more disabled people at all levels, including top management. More recently, in response to changes in the way development 'is done', there has been much greater emphasis on strategies for ensuring the consultation of women's groups in national policy processes (both in terms of mechanisms for ensuring that consultation happens and capacity building activities).³¹ There is evidence that recommendations for disability mainstreaming have taken these issues on board. The NORAD paper provides guidelines on promoting the inclusion of DPOs in country negotiations and policy dialogues. With regard to DFID, Ortiz highlights the need to strengthen mechanisms and capacity for participation in the PRSPs process.

In relation to strengthening consultation and participation in DFID, Thomas (2004) puts forward the interesting concept of "bottom-up mainstreaming". Building on examples of partnerships with NGOs, she argues that:

"There is considerable scope for DFID to develop a 'bottom up' approach to mainstreaming, guided and supported by the initiatives at the centre. Such an approach is likely to be successful because it utilises the strengths and experience of NGOs and CSOs thus ensuring that interventions are culturally and contextually relevant and sustainable because they build local capacity. Furthermore, they are in keeping with DFID's rights-based approach to development and its emphasis on tackling social exclusion through empowerment of marginalised groups. It is a point of principle that disabled people must be fully involved in programmes and projects that affect them. DFID may wish to consider seeking out opportunities to work directly with more DPOs in developing countries as well as with the UK disability movement."
(2004:8)

³¹ The PRSP Source Book gender guidelines, for example, specifically promote the need for gender-sensitive participatory consultation processes at the poverty diagnostic stage. No mechanism exists either within the World Bank or within most national governments. However, to ensure that these guidelines are adhered to and no minimum level of consultation is stipulated – indeed the evidence so far is that women's groups are rarely consulted – the existence of the guidelines has proved a useful advocacy tool for women's networks and coalitions worldwide (Whitehead, 2003).

This is important and appropriate mechanisms for strengthening consultation and participation need to be put in place, as noted in Ortiz's paper. Indeed, there is much emphasis currently on the need for development organisations to devise strategies to support disabled people's organisations regionally, nationally and locally in ways that enable them to truly participate in policy development processes (policy dialogues around SWAPs, PRSPs, etc.). However, as we have attempted to argue in this paper, there also needs to be discussion about the institutional mechanisms for ensure that "bottom up mainstreaming" is supported and guided by "initiatives at the centre".

Related to this, another important lesson from the experience of gender mainstreaming is the need for both 'gender advocates' (those working inside development institutions) and 'gender activists' (those working outside to influence policy-making institutions) and for these two groups to understand ways they can work together as well as their respective constraints/limitations. Specifically with regard to the development of national policy frameworks "it is essential for gender advocates from donor organisations, ministries, parliament and civil society groups to work in conjunction identifying strategic entry points for the promotion of gender equality" (Derbyshire, 2002:24). A similar position holds for disability although, as indicated above, here it has mainly been disability activists outside the organisations who have played an important role in shaping policies.

Lesson Seven: The need to 'upstream' disability issues in response to new aid modalities

As indicated above, the overall shift in official development aid towards non-project assistance in the form of sector-wide approaches (SWAPs) or other forms of direct budgetary support (DBS) to national governments connected to Poverty Reduction Strategy Papers (PRSPs) has raised new challenges for mainstreaming. The shift to non-project development assistance increases the importance of effective policy dialogue between donors and partner governments, particularly about cross-cutting issues such as gender which have tended to be sidelined within the new aid paradigm.

Because a disability dimension too was absent from the almost all PRSPs, the International Labour Organization (ILO) (2002) published a discussion document on the subject suggesting why disabled people needed to be included in this process and how it might be done. STAKES, in its review of Finnish disability policy, devotes

considerable attention to PRSPs and, using the points raised in the ILO document, offers a modified Rapid Handicap Analysis as a tool for trying to ensure the inclusion of disability (2003:91-95). NORAD also includes in its guidelines suggestions for (sector) programme/project cycle management and a disability checklist for country negotiations/dialogue with partners.

Considering the position at DFID, Thomas observes:

“DFID’s commitment to delivering aid through the current aid modalities of DBS, PRSP processes and SWAPs limits the space for disability issues. National governments, almost without exception in the least developed countries, have no interest in disability. If DFID is serious about supporting national ownership of development assistance, then it is unrealistic to assume that disability can be mainstreamed in any meaningful way in the short term” (2004:70).

Despite this, Thomas argues that “respect for national ownership and national priorities does not mean that DFID cannot act on disability in a strategic manner”. For example, this can be done by working to set an example to national governments by including DPOs in their consultation processes (e.g. PRSPs) or supporting DPOs in building their capacity to represent the disabled constituency and lobby governments for their rights.

Ortiz’s paper has a broader vision and lays out specific recommendations for “upstreaming disability issues” in country programming and in development interventions within DFID (2004:9-11). With reference to country programming, these include: “providing expertise and advice on disability issues in government and donor’s development plans, frameworks and official aid documents in the context of PRSP/CDF discussions and national development debates”; “inclusion of disability issues in country strategies”; and “promoting the participation of National Disability Councils and DPOs in PRSP consultations”. Looking at in-country priority interventions that emerge from the country programming process, Ortiz notes that these can take several forms: stand-alone disability projects (here she highlights post-conflict rehabilitation) and disability components or sub-components to sector interventions (e.g. sector budget support, SWAPs, policy-based programme reforms and large investment loans of multilateral banks) where disability is not the main focus.

These guidelines and suggestions sound quite positive but the track record of gender mainstreaming offers a more sombre picture. Overall, the evidence suggests that gender mainstreaming remains illusive at this level. Recent reviews of EU and DFID development planning documents show that gender issues are poorly integrated or not included at all in Country Strategy Papers, Country Assistance Plans, and so on. Similarly, there is limited effort to include gender issues on the agenda in political dialogue with partner governments (Painter and Ulmer, 2002; Watkins, 2003). Specifically on SWAPs, while they have the potential to assist the mainstreaming of cross-cutting issues such as gender, they have largely failed to include a gender perspective (Bell, 2000). However, the World Bank/IMF PRSP Source Book – which aims to provide guidance to countries in the development of poverty reduction strategies – includes a specific focus on gender as a cross-cutting theme:

“Gender issues appear in a fragmented way in the body of the PRSPs dealing with policy priorities and budget commitments. Some women’s needs issues are raised, especially in the sections on health and education, but gender is not integrated or mainstreamed... Governments’ efforts to listen to and consult women at all levels were unsatisfactory”.³²

Background documentation for the current evaluation of gender equality policy and programming in DFID has highlighted the fact that overall commitments to gender equality objectives have appeared to decline since a peak in 2000, which may be linked to decentralisation in DFID or to changes in aid modalities (Watkins, 2004:7).

Of course, as indicated above, nowhere has disability been granted official status as a cross-cutting issue. So, perhaps it is not too surprising that it has not fared very well in the world of PRSPs and SWAPs. As the ILO has pointed out:

“The treatment of disability and persons with disabilities in the PRSP Sourcebook conveys a wrong impression about the abilities and aspirations of the majority of poor persons with disabilities, and is not in keeping with the current human rights approach to disability.” (2002:2)

³² Conclusions from a review of PRSPs in four countries, though drawing on literature from many other country experiences with PRSPs (Whitehead, 2002)

A further challenge for mainstreaming is the continued perception that gender is not essential for achieving the goals of all policy areas. As Carolyn Hannon, Director of the UN Division for the Advancement of Women has recently observed:

“Some organisations continue to base their work on the assumption that certain policy areas, for example macro-economics and technical areas, are in principle ‘gender-neutral’. This makes efforts to incorporate gender perspectives in these areas very difficult.” (2004:5)

In spite of concerted efforts over the past decade by gender researchers, particularly feminist economists, to make these linkages, most organisations still tend to focus on a few sectoral areas where the relevance of attention to gender is fairly well rehearsed (e.g. health and education). One of the current priorities for gender activists with regard to the MDGs, for example, is shifting the focus solely on gender and education towards promoting attention to gender across all the goals (Painter, 2004).

The apparent failures of gender mainstreaming suggest a number of points that are relevant for those concerned with disability. For example, in the cases of the EU and DFID, emphasis has been placed on the need for better institutionalisation of gender (e.g. policy/strategy, structures, staffing, training, shared learning, etc.) for effective gender mainstreaming into key development policy instruments and processes. The importance of forging alliances with sector specialists within organisations and of working with them to understand the sector-specific implications of mainstreaming has also been highlighted (Hannon, 2004). Further, far from seeing current aid modalities as a hindrance for raising gender issues, gender advocates both in civil society and in many donor organisations are keen to have DBS and associated policy dialogues used as a strategic opening to raise gender issues with governments.³³ Support to gender budgeting processes is also given as a good practice example in this area (Macdonald, 2003: 19).³⁴

Related to this, strategies to support civil society groups to push for policy change are essential. This is one of the conclusions of the

³³ Consider, for example, the DAC Working Party on Gender, which has attempted to establish and coordinate partnerships on mainstreaming gender into SWAPs (Bell, 2000).

³⁴ The GAD Network also identified advocacy capacity building for local women’s organisations as a priority intervention in PRSP processes.

disability mapping study and is something that is already being carried out by Action on Disability and Development, an NGO funded by DFID (Thomas, 2004:44-48). The recommendations on capacity-building strategies to support grassroots and other civil society organisations engaged in PRSPs (e.g. skills to analyse budgets in terms of differential impacts on women and men, advocacy and policy-influencing, and so on) may be relevant, though issues of access to political space are likely to be paramount.

Outcomes and impacts

In this section we explore the *outcomes* and *impact* of policies and programmes. Just as equality training or the involvement of women or disabled people and their respective organisations needs to occur in each of the three spheres of mainstreaming, so do evaluation and monitoring. We deal with it here to avoid repetition and because the subject touches most appropriately on what mainstreaming disability or gender is really about: making a positive difference to the lives and prospects of women or disabled people.

Lesson Eight: The need for appropriate tools for monitoring progress and outcomes

If we return to the SIDA schema (Figure 1) on page 15, we are reminded that the outcomes and impact of an effective mainstreaming strategy are measured in terms of greater equality between women and men in society. There have been concerns voiced by women's rights activists that gender mainstreaming, as it has been put into practice in development institutions, appears in some instances to have become an end in itself. Successful mainstreaming has often been judged by the systems that have been put in place for it, rather than in relation to actual changes that have taken place in women's lives.

Impact indicators, i.e. measurements of changes in people's lives, have been among the most methodologically challenging areas of development practice, not least in relation to gender. On this front, mainstreaming advocates are being increasingly challenged to establish the linkages between gender-related interventions (particularly institutional changes and policy) and impacts (e.g.

changes in gender roles or control of resources).³⁵ It has been argued that “it is important that all internal gender mainstreaming strategies are crystal clear on the ways in which they contribute to the ultimate goal of gender equality in the communities served” (Murison, 2002:4). While this is far from being achieved in many organisations, there are some basic requirements that have been identified for strengthening evaluation and impact assessment:

- Relevant baseline information, and appropriate milestones and indicators so that progress towards greater gender equality can be identified and described.
- Consultation with the community concerned to check and compare their perspectives with the information revealed by formal indicators.
- Clear reporting mechanisms that can be used to disseminate information effectively. (Murison, 2002:5)

While these points are fine and gender mainstreaming strategies have called for effective monitoring tools, in general insufficient attention has been paid to monitoring, evaluation and impact assessment. Monitoring and evaluation tend to be challenging areas for most development organisations, irrespective of the gender dimension.

Those championing disability mainstreaming have, for the same reasons outlined above, been concerned about monitoring and evaluation. The EDF Policy Paper, for example, calls for the development of “impact indicators using a human rights and social model approach to disability, integrally linked to poverty reduction indicators” along with the involvement “of disabled persons themselves in the processes of monitoring, evaluation and research” (2002:25). Similar demands are made in the NORAD document, which includes a checklist on implementation and monitoring along with a “framework for defining indicators for the inclusion of disability issues”, specifically in relation to the NORAD strategic framework (2002:21-22). With regard to monitoring in DFID, Ortiz recommends “indicators to track disaggregated data about the level of disabled peoples’ involvement in DFID activities” (2004:14).

As discussed in Lesson Five above, it is relatively simple to set out a checklist or suggest guidelines. However, in the case of evaluation

³⁵ See discussion of the problem of the ‘missing middle’ described in Watkins (2004) as a key challenge for the current evaluation of DFID’s policy on gender equality and women’s empowerment.

and monitoring, these are rather more difficult to apply. At the moment there is little evidence, at least for disability in development, that these have been widely applied, if at all. Nonetheless, there are some observations that can be made from the experience of gender mainstreaming that may be of help for those wanting to develop more practical and robust indicators for the success or otherwise of disability mainstreaming.

For some of the reasons we have identified above, while under pressure to show results, people have used indicators to measure progress in gender mainstreaming (gender policies in place, gender staff, guidelines, demand for sex-disaggregated data and gender analytical information, evidence of gender-sensitive staff members, and so on) that have sometimes placed too much emphasis on the organisational and programme levels. As CIDA says: “Many monitoring and evaluation practices currently focus on activities and inputs rather than on results and impacts” (CIDA, 2000:37). Activities and inputs are important – as is evidence that gender mainstreaming is being taken seriously as a strategy. But there is a danger that the means get confused with the end. As one gender activist has observed, “We have lost sight of the prize” (Win, 2004).

As noted above, it is necessary to be specific about what success will look like in the longer term and develop appropriate tools and indicators to measure progress (changes in people’s lives). This is implicit in the EDF recommendations as well as the guidelines proposed by NORAD.

Another observation is the importance of developing both qualitative and quantitative indicators and including contextual factors. Indicators of inclusion or participation (e.g. numbers of women who have been either beneficiaries of projects or who have participated in project activities, meetings, etc.) are important, but cannot be seen to substitute for impact indicators (e.g. those that measure changes in women’s lives). From this perspective, Ortiz’s recommendation about using disaggregated data to monitor progress is important but needs to be broadened, as does the NORAD’s checklist (2002), which seems largely concerned with counting numbers of disabled people.

The methodological challenges associated with measuring impact in relation to women’s ‘empowerment’ have been vigorously debated over the past decade and a range of empowerment indicators have been developed, including UNDP’s composite indicator, the Gender Empowerment Measure (GEM), which is popular among development

agencies (see Kabeer, 1999). The limits of the GEM, particularly with regard to capturing changing in power relations and agency have been much discussed. Whether this tool could usefully be extended to disability would demand more detailed consideration than we can offer here.

Perhaps the most promising approaches to monitoring and evaluation and impact assessment that have emerged in recent years are those that rely heavily on participatory methodologies.³⁶ A participatory monitoring process is:

“...one in which the target groups have genuine input into developing indicators to monitor and measure change. If successful, this allows for the M&E process to be ‘owned’ by the group rather than imposed on them by outsiders.”
(Brambilla 2001:4)

Such methods have been important for highlighting indicators of change in women’s agency and power that would not have been identified by development planners. Since the early 1990s, and probably earlier, there have been calls for participatory evaluation of both disability projects and the disability dimension in mainstream government policies. For example, the Standard Rules include this requirement³⁷ and more recently there have been detailed proposals for how self-evaluation might be structured to assess the impact of poverty alleviation measures aimed at disabled people (Nagata, 2004; Rapley, 2004). However, it is not clear if any of the latter ideas have been put into practice. There are currently initiatives underway to strengthen impact assessment in relation to rights-based approaches to gender³⁸ and again it is important to ensure that disability equality is being addressed, particularly as development agencies are increasingly accepting, at least on paper, that disability is a human rights issue.

In relation to broader organisational strategies, mainstreaming gender-sensitive indicators into organisational monitoring and

³⁶ For a good overview of the current issues and emerging good practice visit the Research, Evaluation, Monitoring, Appraisal, Planning and Policy (REMAPP) website at www.mande.co.uk/docs/remapp.htm.

³⁷ Standard Rules, Rule 20 and section IV ‘Monitoring Mechanism’ which sets out in greater detail how the rules should be assessed.
www.un.org/esa/socdev/enable/dissre00.htm

³⁸ For example, the UK Interagency group on Rights-based approaches, which includes DFID, is currently undertaking a study on the impact of rights-based approaches and whether they are they delivering anything different from non-rights based approaches.

evaluation systems, particularly regular review processes, has been identified as critical. In this respect, discussions about internal monitoring on disability issues in DFID may need to be carried out in the context of the Policy Information Makers (PIMs), which classify budget commitments according to their principal or significant project objectives. For example, it would be useful to consider whether the example of the PIMs marker on “removal of gender discrimination” might be relevant for tracking disability discrimination. The PIMs marker has provided one means of tracking commitments to gender, though its limitations have been acknowledged and it is perhaps more useful for accountability purposes than as an accurate measure of work and expenditure on gender equality.³⁹

More generally, “in order for indicators to be effective, the objectives of a development initiative against which results are measured must be clear, explicit, feasible, verifiable and realistically timed” (Brambilla, 2001:5). We have seen this argument made in connection with a gender policy/strategy. Setting aside the fact that there is not an institutional policy or strategy for gender mainstreaming in DFID, if we compare the DFID Target Strategy Paper on gender equality with the issues paper on disability, for example, we can see that objectives and indicators have been outlined in the former in the way they have not been in the latter. In this way, the Target Strategy paper provides a set of objectives against which progress can be measured. It can be used as a political tool for gender advocates within the organisation and gender activists outside to hold DFID accountable for its commitments. Given some of the weaknesses that have been identified with the DFID disability issues paper, the same cannot be said with regard to disability mainstreaming.

Conclusion

After 10 ‘official’ years in the development arena, gender mainstreaming has generated a tremendous amount of ‘heat’ in the form of policies, strategies, programmes, organisational changes, research, and so on. It remains unclear, however, how much ‘light’, in terms of either empowerment and inclusion in the development mainstream or real, broad-based gender equality has resulted. Evidence suggests that not only do many gender mainstreaming

³⁹ For example, in DFID Bangladesh, projects that are PIMS-marked for gender were subsequently checked to see what work on gender they had actually done (Macdonald, 2003:17). See also comments on the impact of decentralisation on the usefulness of PIMS markers in Watkins (2004:14).

policies remain stuck to the page, but also that as the bulk of aid has shifted into new instruments, gender concerns are being left behind. All this is not to deny that significant positive changes have taken place, particularly in such areas as education and health as well as in the lives of many women, but only that the feminist goal of fundamentally transforming the development agenda has yet to be realised and efforts to achieve it need to be redoubled.

Those lobbying for mainstreaming disability in development can both take comfort from and be distressed by the history of gender mainstreaming. The distress comes from realising that despite the immense political weight applied to make gender a cross-cutting issue and the apparent acceptance of this by almost every development agency, the outcomes have not lived up to expectations. What chance, then, for disability, which has not been awarded cross-cutting status and where there is no agreement even on how to define it?

As for comfort, this is somewhat harder to find. Nonetheless, one glimmer of consolation is in understanding and accepting just how difficult it is to challenge attitudes, organisational culture and power relationships as well as to tap the financial resources and develop the commitment and skills necessary to institute progressive change. In development cooperation both gender and disability are projects that will take many years, if not decades, to realise. Those looking for 'big hits' or quick victories will invariably be disappointed. This is probably the single most important overarching lesson to derive from the experience of gender mainstreaming. The campaign will be difficult and prolonged.

In this campaign, one important advantage held by the disability movement and its allies within development agencies is the experience of gender mainstreaming: what weapons are needed, where there are pitfalls and dead ends, and the areas where breakthroughs and sustained changes are most likely.

The comparative analytical approach we have adopted in this paper has helped to highlight these issues. Furthermore, it has identified some of the most significant gaps in disability mainstreaming and how these are manifest at different interconnected levels in the mainstreaming process. In using this approach we have been able to add to and/or strengthen recommendations made by others both with respect to how best to mainstream disability in development cooperation generally and how to do this for DFID in particular. These are summarised below, starting with the former.

Mandate and strategy

Gender mainstreaming has demonstrated that a strong and clear mandate or policy, fully supported from the top, is needed in order to set the table for mainstreaming across organisational, programmatic and outcome spheres. However, setting the table does not mean anyone is going to sit down to eat. To achieve this for disability, an implementation strategy with clear time-bound targets is a first requirement.

Communicating mandate and strategy

Mandates and strategies are necessary, but as the gender mainstreaming experience has demonstrated, not in the least sufficient. To have any impact they must be effectively communicated throughout an organisation. Furthermore, it has been shown that as this occurs, subtle changes in the meaning of gender can take place which can undermine the intention of policy. This is likely to be a more serious problem for disability, which remains, for most people, essentially a question of physical or mental deficit rather than one of discrimination and human rights. It is, therefore, necessary to monitor how key concepts are being understood by and communicated to staff.

Training

In order to ensure effective shared understanding of issues like disability or gender, staff at all levels need to have appropriate training. Some of this will have to be technical, that is linked to particular roles and responsibilities, but a clear lesson from gender mainstreaming is that such strategies will not be implemented successfully unless there is a fundamental change in staff attitudes. This in turn requires a serious commitment to an ongoing programme of equality training throughout the organisation.

Driving the agenda

Various solutions to deliver gender mainstreaming have been tried, but it has become clear that unless there are people who are directly responsible, it will languish as it then becomes no one's responsibility. This suggests that although there needs to be an organisation-wide concern for disability, the only way this can be maintained and furthered is by having a dedicated disability unit. Whether the same degree of attention can be mustered by a working group on diversity, such as that currently being tried at DFID, remains an open question.

Putting the agenda into practice

A sound understanding of the issues to be tackled is the essential requirement for mainstreaming at the programme level. In turn this demands appropriate disaggregated data and the conceptual means (gender or disability analysis) for interpretation. This needs to be supported by action research built on the experience and expertise of women or disabled people and their respective organisations. In fact, such active involvement has been seen as one of the key aspects of a human rights approach to development. As with policy, research findings also need to be effectively disseminated.

Upstreaming the mainstream agenda

As aid is increasingly channelled through a variety of new country-level instruments, project-based work is becoming relatively less significant in development cooperation. This has created difficulties for cross-cutting issues such as gender and would-be cross-cutting issues such as disability, largely because the panoply of measures developed to take these projects forward were designed mainly for a project-based world. Therefore there is an urgent need to re-examine and redesign existing policies and practices to meet the challenges of the new development paradigm and ensure that demands for gender and disability equality in development are not sidelined.

Evaluating and monitoring practice and outcomes

This is proved to be one of the most important but most difficult areas for gender mainstreaming. A range of measurements have been attempted but none has really been able to measure outcomes or capture the full impact on the lives of women. Probably the most fruitful direction here is for greater reliance on participatory evaluation techniques that will extend and make more profound the involvement of women and disabled people.

Mainstreaming disability within DFID
Some key lessons from gender mainstreaming

- Devise a clear mandate for disability
- Adopt disability as an official cross-cutting issue
- Develop an implementation strategy with accountable, time-bound goals both in terms of employment and programme work
- Consider how this mandate and strategy can be most effectively communicated throughout DFID
- Establish a sub-group with specific responsibility for disability within the Exclusion, Rights and Justice team in the Policy Division
- Appoint a disability officer/advisor to champion disability issues
- Address training issues on disability equality
- Devise appropriate monitoring and evaluation systems together with DPOs
- Collect disability-disaggregated data and develop a disability-based equivalent to gender analysis
- Continue and extend consultation with DPOs in both the North and South
- Develop methods and practices to ensure that disability is taken on board as a cross-cutting human rights issue in multilateral aid instruments
- Demonstrate a practical commitment to mainstreaming disability by earmarking appropriate levels of funding

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