

# Annex 8

## GENDER AND INCLUSION

### CONCEPTUAL AND APPROACH PAPER

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Prosperity Fund

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## Table of Acronyms

ADB	Asian Development Bank
BC	Business case
E&L	Evaluation and Learning
EQ	Evaluation question
ETI	Ethical Trading Initiative
FGD	Focus group discussion
G&I	Gender and Inclusion
G&I	Gender and Inclusion
GEA	Gender Equality Act
IADB	Inter-American Development Bank
IDA	International Development Act
IMF	International Monetary Fund
IP	Implementing Partner
M&R	Monitoring and Reporting
MR	Monitoring and Reporting
MREL	Monitoring, Reporting, Evaluation and Learning
MREL	Monitoring, Reporting, Evaluation and Learning
PF	Prosperity Fund (or the Fund)
PFMO	Prosperity Fund Management Office
SDGs	Sustainable Development Goals
SME	Small and Medium Sized Enterprises
SRO	Senior Responsible Officer
TOC	Theory of Change
UNHLP	UN Secretary General's High-Level Panel
VfM	Value for Money
WB	World Bank
WEE	Women's Economic Empowerment

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This report was prepared during the inception phase of the Prosperity Fund Evaluation and Learning contract. It forms an annex to the main Inception Report.

It was produced and approved by the Prosperity Fund Management Office before the main Inception Report and Workplan were finalised and agreed.

If there is any inconsistency between this annex and the main Inception Report and Workplan, the main Inception Report and Workplan provides the agreed position.

# 1 Conceptual background

## 1.1 Background

The Cross-Government Prosperity Fund (PF, or the Fund) is a £1.2 billion programme that aims to promote reform and investments needed for economic growth in emerging and developing economies through opening up markets for international business, including UK business. The priorities of the Fund include improving the business climate, operation and competitiveness of markets, energy and financial sector reform, infrastructure and future cities, and increasing the ability of governments to tackle corruption.<sup>1</sup>

**The Fund and this paper, which is to become the conceptual basis of work on gender and inclusion (G&I) for the Monitoring, Reporting, Evaluation and Learning (MREL) contractors in the Prosperity Fund, must be understood within the higher-level policy framework.** The Sustainable Development Goals (SDGs) explicitly endorse gender equality, with a key goal of eradicating extreme poverty by 2030. In meeting the Goals and responding to rising global challenges such as conflict, extremism, climate change and migration, success depends on putting into practice the principles of universality, accountability and the central commitment to ‘Leave No One Behind’ throughout all of Agenda 2030.

**This higher-level policy framework puts people at the centre of development efforts, makes explicit *who* benefits from development and *who* is excluded, and underlines the need for concerted efforts to tackle exclusion.**<sup>2</sup> In alignment with these internationally agreed policy commitments is the UK’s commitment outlined in the 2002 International Development Act (IDA) – which stipulates that the UK Secretary of State “*may provide ... development assistance if he/she is satisfied that the provision of the assistance is likely to contribute to a reduction in poverty*” and the 2014 amendment, the International Development Gender Equality Act (GEA), which states that “*the Secretary of State shall have regard to the desirability of providing development assistance that is likely to contribute to reducing poverty in a way which is likely to contribute to reducing inequality between persons of different gender*”. This means that judgments have to be made about the intent and the likely impact of aid spending. All development programming must comply with the Act by being, at a minimum, sensitive to gender by ensuring that gender equality and social inclusion has been ‘meaningfully considered’ in all political, economic and social spheres’. This entails assessing and addressing the differentiated effects of an intervention on different women, men, girls and boys throughout planning, design, implementation, and monitoring and evaluation – while also being conscious of their specific needs for facilitating a more active engagement in articulating their demands and improving links to state structures.

**However, a focus on gender is also recognised as good business practice and can enhance value for money (VfM).**<sup>3</sup> It has been acknowledged that “*closing the gender gap is smart economics*”, as countries which “*maximize economic opportunities in an equal manner for both men and women advance their overall competitiveness and productive labour force*

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<sup>1</sup> Prosperity Fund: Gender Policy Statement

<sup>2</sup> UK Department for International Development (2015)

<sup>3</sup> Prosperity Fund: Note on Gender

*participation*".<sup>4</sup> Nonetheless, there remain "large gender gaps in economic opportunities and outcomes in almost all countries. Women earn less, have fewer assets, bear the burden of unpaid work and care and are largely concentrated in vulnerable and low-paying activities".<sup>5</sup> This is why women's economic empowerment and gender equality are pre-requisites for ending poverty (SDG 10: Reduce Inequality within and among Countries) and are reflected as being intrinsic to the achievement of 2030 Agenda for Sustainable Development through Goal 5.

There is visible leadership on this, as evidenced by the work of the UN Secretary-General's High-Level Panel on Women's Economic Empowerment. DFID's 2017 Economic Development Strategy (outlining its commitment to "tackle gender discrimination and work to deliver safer, more secure and higher-return work for women") further aims to "create more opportunities for the poorest and excluded groups (including for youth and people with disabilities) to access improved jobs, labour rights and working conditions, which in turn help address discrimination".<sup>6</sup>

**With these points in mind, legal compliance with the both the IDA and the GEA is a minimum expectation, as the Fund has outlined in its Gender Policy Statements that it "aspires to be both ambitious and transformative in its approach to gender".** This means that the Fund will need to track how good it is at promoting opportunities and positive outcomes for women and other excluded groups where possible – a key question for the Fund will be 'how much does the portfolio rely on 'trickle-down' impact vs. the direct targeting of beneficiaries?'

**Integrating gender considerations in the Fund is also anticipated to help stimulate and contribute to a number of changes** (though it should be noted there is a question around the effectiveness of each of these – i.e. the number of programmes directly targeting women and other groups through these approaches is likely to be low, and indirect benefits are more likely to be in the way in which women are targeted):<sup>7</sup>

- **Employment:** Increasing women's (and other excluded groups') opportunities for employment in productive jobs with better working conditions, greater and more stable incomes, and more time through a more manageable workload. This includes greater representation of women in all kinds of employment; in particular, reducing the occupational and sectoral segregation that often sees women concentrated in low productivity and low-growth work.
- **Enterprise:** Tackling discriminatory laws and regulations that prevent women from working and doing business, strengthening mobility, expanding market activity and opportunities, and improving the size and profitability of women's enterprises.
- **Assets:** Increasing opportunities for women and girls (and other excluded groups) to access, control and retain economic assets, including land, financial products, appropriate technology and tools; reduced exposure to risk.

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<sup>4</sup> World Bank (2016)

<sup>5</sup> UN Secretary General's High-Level Panel on Women's Economic Empowerment (undated)

<sup>6</sup> UK Department for International Development (2017)

<sup>7</sup> Prosperity Fund: Gender Policy Statement, and Jacobson, J., Mohun, R and F. Sajjad (2016)

- Participation in planning, policy and decision-making: Increasing women's leadership and role modelling for other girls and women.

In order to do this, the Fund will need to gather insights on its distributional impact on poverty reduction, inclusive growth and gender equality.

## 2 The Prosperity Fund's Conceptual Understanding

### 2.1 Defining Gender Equality and Inclusion

Gender inequality is one of the most pervasive forms of discrimination worldwide, and a key driver of poverty. Women and girls often experience multiple, systemic barriers (such as formal and customary regulations, and discriminatory social norms) to accessing resources and opportunities, knowledge, information, networks and markets, and generally have less influence in decision-making compared to men.<sup>8</sup>

**Gender equality** refers to the full and equal exercise of rights by men and women: they have equal access to socially, economically and politically valued goods, resources, opportunities, benefits, and services. It is the absence of any discrimination on the basis of gender.

Social exclusion occurs when certain groups are systematically disadvantaged based on social characteristics, such as gender, age, particular risk factors (e.g. disability, ethnicity, caste, migrant status, religion, sexual orientation), type of household (e.g. one-person household, single parent), the level of education and literacy, employment status, or housing status. This results in different social, political and economic inequalities and can result in individuals being discriminated against and denied recognition and resources<sup>9</sup>.

**Social inclusion**, then, refers to the process of removing institutional barriers and the improvement of incentives to increase the access to development opportunities by a range of individuals and groups; it is essentially making the 'rules of the game' fairer.

MREL understand gender equality and inclusion as distinct but overlapping concepts. For some groups, exclusion is based on gender while for others, it is based on other factors, such as those outlined above. However, for most people, exclusion is based on a number of factors across both dimensions, which shift in the context of diverse relationships and institutional settings. Therefore, it is not possible to address gender without also addressing inclusion.

### 2.2 G&I Conceptual Framework

**The PF has its own G&I framework which has been reviewed by the MREL team.** It outlines three different levels of programming that the Fund will be supporting.

The first level and the least ambitious end of the continuum is 'minimum compliance' which is about programming and interventions addressing the basic and practical needs and vulnerabilities of women (and where possible, other excluded groups). These programmes will identify risks and unintended negative consequences to avoid, mitigate and monitor (ensuring Do No Harm), and integrate gender across the programme cycle.

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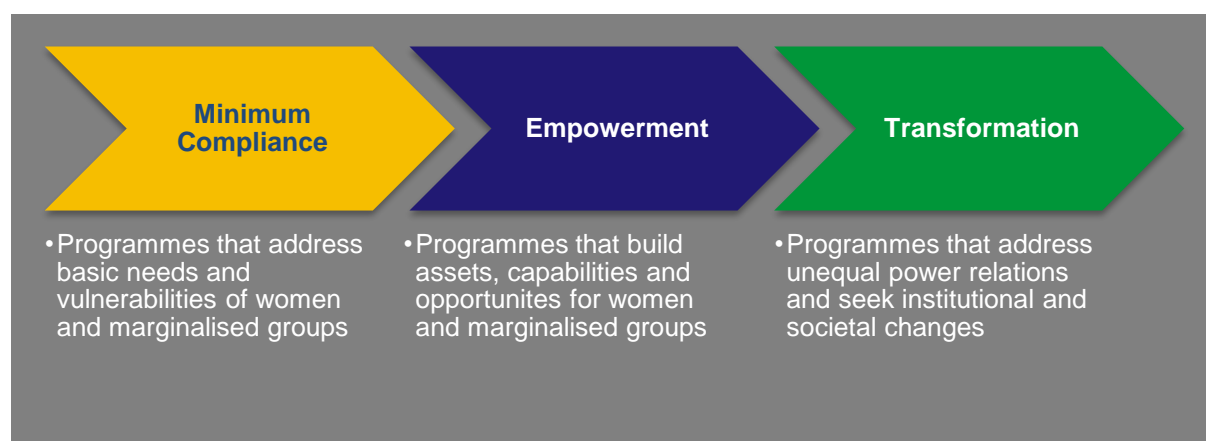
<sup>8</sup> Oxfam (2017)

<sup>9</sup> Betts, Watson and Gaynor (2010)

The middle level, ‘empowerment’ is about building assets, capabilities and opportunities for women (and where possible, other excluded groups) to become economically empowered through increased access and control over these, as well as greater individual agency and decision-making.

The most ambitious end of the spectrum is ‘transformation’; closely associated with addressing unequal power relations, seeking structural change in institutions and social relations in order to support women and other excluded groups to contribute to, and benefit from, economic participation, going beyond the individual level.

**Table 1: The Gender and Inclusion Framework (adapted from Caroline Moser and Social Development Direct, 2016) for the Prosperity Fund**



**The Fund lends itself to a greater focus on women’s economic empowerment (pillar two of the G&I framework), due to its thematic focus.** For example, “*infrastructure is a key enabler for women’s economic empowerment, particularly transport, energy, affordable housing/informal settlement upgrading, water and sanitation, and ICTs*”<sup>10</sup>. The “*elimination of barriers against women working in certain sectors or occupations could increase labour productivity by as much as 25% in some countries through better allocation of their skills and talent. McKinsey estimates that \$12 trillion could be added to the world economy by 2025 through greater female economic empowerment. Economic empowerment of girls and women matters for economic growth, for example through its impacts on firm performance, agricultural productivity and generation of tax revenues for investment*”.<sup>11</sup>

**Without empowering and engaging women and other excluded groups in the economy, growth that positively impacts on poverty and inequality will be difficult to achieve.** It cannot be assumed that growth is inclusive: different groups will experience different impacts unless concerted efforts are made to encourage a more equitable impact. This requires that G&I considerations are considered in all Fund and MREL activities.

**Incorporating gender (and inclusion analysis) into the Fund will increase the likelihood that it will achieve the maximum potential of its intended impact on poverty – maximising broad-based benefits and outcomes.** The Fund needs to understand *who* is excluded and *why*, in order to break down barriers and facilitate opportunities for poor and

<sup>10</sup> Jacobson, Mohun and Sajjad (2016)

<sup>11</sup> Prosperity Fund: Gender Policy Statement



excluded groups, avoiding inefficiencies that be caused by a lack of consideration of the barriers that they face in their economic participation and empowerment (such as the burden of unpaid household work and caring responsibilities as a major barrier for women). If the Fund does not take sufficient account of gender and inclusion, it could do harm by reinforcing patterns of exclusion and discrimination.

*“There is growing consensus that **economic growth is not sufficient to reduce poverty if it is not inclusive and if it does not involve the three dimensions of sustainable development – economic, social and environmental**” – there is a need for a “principle [of] paying attention to the needs of disadvantaged and marginalized populations.” – UN Sustainable Development Goals*

*“**Inclusive growth is economic growth that creates opportunity for all segments of the population and distributes the dividends of increased prosperity, both in monetary and non-monetary terms, fairly across society.** ... Rising inequality in earnings and in wealth is a major concern, but money is just one aspect of people’s well-being. In just about every area, whether it be education, life expectancy, or employment prospects, success is determined by socio-economic status, wealth and assets, sex, age or the places where people live. **The OECD approach to inclusive growth is multidimensional, going beyond income, and that the proceeds of economic growth must be shared.**” – OECD (2017))*

**Economic inclusion of excluded groups supports growth and is good for business:**

- Gender Equality is positively correlated with reductions in poverty and income equality. The International Labor Organization (ILO) estimates that closing the gap would increase world GDP by 3.9 percent in 2025, or \$5.8 trillion.
    - Evidence from the Asian Tiger economies (Hong Kong, South Korea, Singapore and Taiwan) shows that capitalizing on the energy and dynamism of their young population was responsible for one-third of their economic growth from the 1960s to the 1990s.<sup>1</sup>
- Social Development Direct with USAID (2017)  
Fact Sheet Series on Inclusive Growth

*“Promoting economic transformation may not immediately benefit the poor, while the contribution to poverty reduction through employment creation may be long and uncertain .... **a recent consensus has emerged that growth must also be equitable if it is to make a significant impact on poverty.** The Sustainable Development Goals and other development agendas therefore **emphasise inclusive growth**, although there is no settled definition of the term” – ICAI (2016)*

The G&I framework recognises that economic empowerment is not just about supporting increased access to economic opportunities and assets so that individuals can advance economically, it is also about individuals having the power and agency to make decisions and have control over incomes, resources and profits, so that they can benefit from economic activities.<sup>12</sup> This is why we see the Fund's efforts on equality and inclusion as going beyond minimum compliance and Do No Harm, to proactively harnessing opportunities for economic empowerment and, where possible, to transforming gender and power relations, and the structures, norms and values that underpin them (pillar 3 of the G&I framework).

**This framework is also aligned with the UN Secretary General's High-Level Panel on Women's Economic Empowerment.** The High-Level Panel has conveyed seven primary drivers (please see figure 1 overleaf as an illustration) of women's economic empowerment and their "*full and equal economic participation*" within informal work, agriculture, and women-owned enterprises, as well as for formal sector employees<sup>13</sup>:

- Tackling adverse norms and promoting positive role models
- Ensuring legal protection and reforming discriminatory laws and regulations
- Recognising, reducing and redistributing unpaid work and care
- Building assets – Digital, financial and property
- Changing business culture and practice
- Improving public sector practices in employment and procurement
- Strengthening visibility, collective voice and representation

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<sup>12</sup> Golla, A., Malhotra, A., Nanda, P. and R. Mehra (2011) and Taylor and Perezniето (2014)

<sup>13</sup> UN Secretary-General's High-Level Panel on Women's Economic Empowerment (2017)

Figure 1: Seven primary drivers of women’s economic empowerment, adopted from UN Secretary-General’s High-Level Panel on Women’s Economic Empowerment (2017)

### Seven primary drivers of women’s economic empowerment



### 2.3 Applying the G&I framework to the Fund and MREL activities

The G&I framework is being given consideration by the MR and EL contractors in their separate gender approach papers. Together, the MREL team will monitor and assess the impact of the Fund on the beneficiaries of the programmes, the initiatives and circumstances most likely to lead to inclusive growth and development, as well as those most likely to support women’s economic empowerment and gender equality. Collectively, the MREL team aim to strike a balance between on the one hand, accountability, performance and compliance; and learning and knowledge production on the other.

The MREL contractors and the Prosperity Fund Management Office (PFMO) are in the process of agreeing a number of principles in order to be as gender-responsive as possible. The suggested list of principles for the MREL approach to gender endeavours to closely align with principles for gender-responsive evaluation, including:<sup>14</sup>

- Assessing the extent to which Prosperity Fund investments have benefited women (and excluded groups) and supported women’s economic empowerment by meeting their practical needs and building their assets, capabilities and opportunities ( in line with the PFMO’s Gender & Inclusion Framework);

<sup>14</sup> UN Women Independent Evaluation Office (2015)

- Assessing the extent to which gender and power relationships (including structural and other causes which sustain inequalities and discrimination) change as a result of an intervention;
- Using a process that is inclusive, participatory and respectful (and as empowering as possible) of all stakeholders involved, and which communicates back results;
- Promoting accountability for commitments to gender equality, women's empowerment and human rights by providing information on how interventions are impacting women and men differently, and how they are contributing to achieving these commitments;
- Promoting broader social and institutional change by using produced knowledge for better programming that supports gender equality, women's empowerment and human rights in a sustainable manner.

**Alongside establishing principles to guide all MREL processes, the EL team has identified three broad options for the EL component; these have been discussed with the PFMO.** These options vary in their levels of ambition – particularly in the scope for learning alongside monitoring, reporting and performance evaluation processes undertaken by the MR and EL contractors.

There are two key differences between the options:

- The scale of investment: increased resourcing (in terms of G&I expertise and budget) is needed for the maximal option;
- The focus areas of evaluation and learning: the three options directly relate to the PF's G&I framework and its three pillars - compliance, empowerment and transformation. For example, the evaluation questions proposed may have additional or different sub-questions for each option.

The options are summarised below, and will be presented in more detail in a separate paper, to be submitted by the EL team in early February.

1. **Option 1: compliance**: The focus of this option is on assessing **due diligence**<sup>15</sup> and risk mitigation on gender and inclusion and women's economic empowerment. This option principally focuses on monitoring, reporting and evaluation (accountability for performance and compliance with the IDA and GEA) on G&I. It offers light-touch, *ad hoc* gender and inclusion support.
2. **Option 2: empowerment**: The focus of this option is on assessing **due diligence, risk mitigation and benefit flows to women and other excluded groups**. This option provides monitoring, reporting, evaluation and learning. It would ensure that the Fund is compliant with the IDA and the GEA, and offers a thematic evaluation of selected programmes to compare how well they have done at promoting G&I. This option would require long-term G&I expertise on the EL team, and synthesis of G&I learning to be integrated into learning products and processes.

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<sup>15</sup> Following the rules or guidance of the International Development Act (Gender Equality).

3. **Option 3: transformation:** The focus of this option is on assessing **due diligence, benefit flows to women and other excluded groups and institutional and societal changes** in power relations (i.e. changes in attitudes, behaviours and norms, the formal and informal rules of the game) to support gender equality and women's economic empowerment. This option also provides monitoring, reporting, evaluation and learning but would include a larger scale thematic evaluation, and distinctive gender and inclusion learning instruments (such as a learning platform, peer learning groups and thematic studies). This option would require more G&I expertise on the EL team.

## 3 Approach to Gender and Inclusion in E&L

### 3.1 Introduction

The PFMO requested that the E&L team produce a short, practically-focused paper, based on the conceptual underpinning to G&I outlined in the G&I Conceptual Approach Paper, which sets out clearly the team's approach to G&I covering all elements of the brief provided by PFMO's MREL team. Specifically, the PFMO outlined that this paper should:

- Briefly describe methods used for this paper;
- Acknowledge that secondary benefit is out of scope in relation to gender and inclusion (exploring the compliance of UK businesses in the Fund countries with UK socially responsible business practices is part of primary benefit and in scope);
- Only put forward options that the team would be happy to have selected. It would be good to present these very clearly explaining what differences there are (if any) in approaches to programme evaluations, synthesis and thematic evaluations;
- Explain how the team will approach gender and inclusion in programme evaluations;
- Explain how the team will approach gender and inclusion in its work to synthesise findings from programme evaluations to fund level;
- Explain what an early gender thematic evaluation might look like – including different options for this (if appropriate); and
- Clearly link to other documents produced by the E&L team including the evaluation framework and questions.

This paper draws on discussions with the PFMO MREL team and the PFMO Gender Adviser, discussions held internally in the E&L team on fund-level and programme evaluation, synthesis of evaluation findings and learning, as well as those held with the Monitoring and Reporting (M&R) contractor on proposed gender-specific indicators and indicator disaggregation at Fund and programme level. This paper also draws on PFMO's G&I Programme Framework, and accompanying proposed gender markers.

The paper is structured as follows:

- **Section 2** outlines the Principles and the Gender and Inclusion (G&I) conceptual framework to Fund MREL activities.

- **Section 3** then outlines in detail how the G&I conceptual Framework will be applied in practice to E&L activities, across different evaluation and learning products and processes, including G&I training.

### 3.2 Principles and G&I conceptual framework to Fund MREL activities

The MREL contractors and the Prosperity Fund Management Office (PFMO) are in the process of agreeing several principles to be as gender-responsive as possible. The suggested list of principles for the MREL approach to gender endeavours to closely align with principles for gender-responsive evaluation, including:<sup>16</sup>

- Assessing the extent of due diligence as part of GEA compliance (differentiated impact on women and men, boys and girls and other excluded groups assessed as part of intervention choice and design) to ensure no harm is done;
- Assessing the extent to which Prosperity Fund investments have benefited women (and excluded groups) and supported women's economic empowerment (WEE) by meeting their practical needs and building their assets, capabilities and opportunities, recognising that it is possible to do so without changing power relations and institutions (in line with the PFMO's Gender & Inclusion Framework);
- Assessing the extent to which gender and power relationships (including structural and other causes which sustain inequalities and discrimination) change due to an intervention;
- Using a process that is inclusive, participatory and respectful (and as empowering as possible) of all stakeholders involved, and which communicates back results;
- Promoting accountability for commitments to gender equality, women's empowerment and human rights by providing information on how interventions are impacting women and men differently, and how they are contributing to achieving these commitments;
- Promoting broader social and institutional change by using produced knowledge for better programming that supports gender equality, women's empowerment and human rights in a sustainable manner.

The E&L team has identified three broad options for the E&L component of the evaluation's approach to gender and inclusion (G&I). These options vary in their levels of ambition – particularly in the scope for learning alongside monitoring, reporting and performance evaluation processes undertaken by the M&R and E&L contractors.

There are two key differences between the options:

- The scale of investment: increased resourcing (in terms of G&I expertise and budget) is needed for Option 3;
- The focus areas of evaluation and learning: the three options directly relate to the PF's G&I framework and its three pillars - compliance, empowerment and transformation.

The options are summarised below:

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<sup>16</sup> UN Women Independent Evaluation Office (2015)

4. **Option 1: compliance:** The focus of this option is on assessing **due diligence** and risk mitigation on G&I and women's economic empowerment.<sup>17</sup> This option principally focuses on monitoring, reporting and evaluation (accountability for performance and compliance with the IDA and GEA) on G&I. It offers light-touch, *ad hoc* gender and inclusion support to the E&L team.
5. **Option 2: empowerment:** The focus of this option is on assessing **due diligence, risk mitigation on G&I and benefit flows to women and other excluded groups**. This option provides monitoring, reporting, evaluation and learning. It would ensure that the evaluation produces evidence of whether the Fund is compliant with the IDA and the GEA, and offers a thematic evaluation of selected programmes to compare how well they have done at promoting G&I. This option would require long-term G&I expertise on the E&L team, and synthesis of G&I learning to be integrated into learning products and processes.
6. **Option 3: transformation:** The focus of this option is on assessing **due diligence and risk mitigation on G&I, benefit flows to women and other excluded groups and institutional and societal changes in power relations** (i.e. changes in attitudes, behaviours and norms, institutions, policies and laws) to support gender equality and women's economic empowerment. This option also provides monitoring, reporting, evaluation and learning but would also include a larger-scale thematic evaluation, and distinctive gender and inclusion learning instruments (such as a G&I peer learning group). This option would require more G&I expertise on the E&L team.

It is important to note that studies in Option 2 will harvest examples of transformative programme practices and results, even though these will not be a major focus of the enquiries.

This paper **presents Options 2 and 3 in detail**. Option 1 is not described in detail as the E&L team considers that although it meets the requirements of the UK international Development Act (2002) and Gender Equality Act (2014), it does not meet the ambition of the Fund that is set out in PFMO briefing and policy papers on gender and as this ambition is understood by the E&L team.

A detailed table of the two Options is presented in Annex 1. This sets out the evaluation questions, markers/focal outcome areas to be evaluated, the methods and indicative resource needs by Option. Table 1 on page 7 presents a summary of the key evaluation activities, their scale and a broad indication of human resource needs associated with Options 2 and 3.

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<sup>17</sup> Following the rules or guidance of the International Development Act (Gender Equality).

Table 1: Summary of Options 2 and 3

E&L Activity	Option 2 EMPOWERMENT	Option 3 TRANSFORMATION
	<p><b>DUE DILIGENCE</b></p> <ul style="list-style-type: none"> <li>• GEA/PFMO Gender Policy and Guidance compliance</li> <li>• Due diligence</li> <li>• Risk mitigation</li> </ul> <p><b>EMPOWERMENT</b></p> <ul style="list-style-type: none"> <li>• Benefit flows to women and other excluded groups (assets, capabilities, opportunities)</li> </ul>	<p><b>DUE DILIGENCE</b></p> <ul style="list-style-type: none"> <li>• GEA/PFMO Gender Policy and Guidance compliance</li> <li>• Due diligence</li> <li>• Risk mitigation</li> </ul> <p><b>EMPOWERMENT</b></p> <ul style="list-style-type: none"> <li>• Benefit flows to women and other excluded groups (assets, capabilities, opportunities)</li> </ul> <p><b>TRANSFORMATION</b></p> <ul style="list-style-type: none"> <li>• Changes in institutions, policy, laws and social norms (attitudes, behaviours)</li> </ul>
Year 1 Thematic G&I Evaluation	All programmes	
Years 3-4 G&I Thematic Evaluation	Smaller sample of programmes	Larger sample
Programme/family-level evaluations address G&I	Smaller sample of programmes	Larger sample
G&I learning processes (mainstreaming and specific G&I peer learning group)	Smaller-scale G&I learning group	Larger-scale G&I learning process and group with more frequent activities and products
Synthesis	Scale of synthesis the same under both Options	
G&I Training and technical support to E&L team	Smaller number of programme evaluation members to engage with	Greater number of programme evaluation members to engage with
Human resource needs	Long-term G&I expertise on the EL team, covering smaller sample of programmes and a small-scale G&I learning process.	Long-term G&I expertise on the EL team, covering more programmes to be involved in evaluations, as well as a more extensive G&I learning process.

### 3.3 Applying the G&I framework to E&L activities

The approach to evaluating and learning on G&I will follow the proposed Fund annual learning and evaluation cycle which has been set out in the draft Evaluation Framework.

The approach set in this paper seeks to answer Evaluation Question (EQ) 10:

- To what extent have the Prosperity Fund interventions contributed to results that support gender equality, women's economic empowerment and social inclusion in line



with the UK's Gender Equality Act and the Prosperity Fund Policy and Guidance and Gender and Inclusion Framework?<sup>18</sup>

- The extent to which the programme has put in place gender/inclusion-responsive Fund and programme mechanisms;
- The extent to which the analysis, consultation, design, implementation, monitoring of programmes is G&I-responsive/in line with the GEA and internal PF policies and guidance; and
- Results achieved by the PF that have contributed to gender equality, women's economic empowerment and social inclusion.

The G&I conceptual framework guides measurement and evaluation work by providing a focus for outcomes (due diligence, risk mitigation, empowerment and transformation) to be measured and evaluated in both programme design and the results these achieve.

A Table of the two Options is presented in Annex 1, which outlines the evaluation questions, markers/focal outcome areas to be evaluated, the methods and indicative resource needs by Option.

The following sections outline how E&L activities will seek to answer EQs Under Options 2 and 3. The differences in Options in terms of focus, method and scale will also be outlined.

### **3.3.1 Input and organisation of G&I expertise across evaluation and learning**

As G&I are cross-cutting issues, the E&L team will ensure that specific G&I input and expertise is available to each evaluation, by integrating G&I questions into evaluation plans and instruments, and closely coordinating with leads for each evaluation and synthesis product. Additional G&I resources may also be made available, including at country level, depending on the scale/scope and needs of each evaluation.

To ensure that G&I is sufficiently integrated into all evaluations, guidance will be developed and steps put in place:

- **G&I questions will be integrated into evaluation plans;**
- **Minimum standards and guidance on G&I developed for all evaluations:** including 'minimum' G&I evaluation questions, methods, analysis and presentation of findings;
- **G&I specialist/s will input** into the formulation of evaluation questions and design of the methodology and research instruments. G&I specialist/s will either play a 'lead' role (such as in the case of a thematic G&I evaluation) or offer advisory or core inputs to members of evaluation teams (depending on the focus of each evaluation); and

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<sup>18</sup> To be judged on a 'scale' provided by the PF G&I Framework, ranging from minimum compliance to transformational change, assessing whether and to what extent PF interventions: Meet *minimum compliance* with GEA (undertaken due diligence and do no harm) to understand the potential distributional impact of interventions on women and other excluded groups; *Support opportunities for/ removing barriers to women's economic empowerment* to promote benefit flow to poor and excluded groups/ for SMEs/ informal sector; *Promote transformational change* (institutional and societal level changes that address gender discrimination and exclusion and systematic disadvantage based on other social identities).

- **Training, induction, and briefing on G&I** will be given to evaluation team members (as well as country-based research teams) in relation to each evaluation.

Sections focusing on different evaluation processes will outline how the G&I specialist will work together with the rest of the E&L team to ensure that G&I issues are mainstreamed into the E&L team's work.

### 3.3.2 Thematic G&I evaluations

Thematic G&I evaluations will be designed and managed at the Fund level, and will cover aspects and factors relating to G&I that are common to some or all programmes, such as: the extent to which programmes are undertaking due diligence on G&I, including their level of compliance with the GEA and internal PFMO G&I policy; integration of G&I into scoping and situational analysis, management mechanisms and processes, strategic focus and programme/intervention design (and its effects on intended or unintended outcomes).

These thematic studies will provide additional evidence to test Fund-level assumptions about how to bring about changes, such as women's economic empowerment, contributing to Fund-level assessment of performance and learning.

We propose to carry out two Thematic G&I evaluations in the lifetime of the Fund:

- **Year 1: Thematic G&I Evaluation** that assesses how programme analysis and design is addressing G&I and the extent to which they are **undertaking due diligence on G&I**, including their level of compliance with the GEA and internal PFMO gender and inclusion policies and guidance.
- **Years 3-4: Thematic G&I Evaluation** that assesses programme and project GEA and PFMO G&I policy compliance, looking at how design reflects G&I considerations, and what outcomes programmes and projects are achieving and how.

#### Year 1 Thematic G&I Evaluation

The purpose of the first Thematic G&I Evaluation is to understand how and the extent to which G&I have been reflected in programme design, identifying promising practices and gaps, and providing a basis for addressing EQ4 and EQ10. One of the core aims is to assess the level of GEA compliance (i.e. how intervention choice and design have considered the differentiated impact on women and men, boys and girls and other excluded groups) to ensure no harm is done. Programmes will also be assessed on their level of compliance with internal PFMO gender and inclusion policies and guidance.

In addition to assessing how programmes have addressed gender and women's economic empowerment, the evaluation will also assess how programmes are designed to promote inclusive growth for other **excluded groups** (poorer income quintiles, caste and ethnicity) in line with the targets set in Sustainable Development Goal (SDG) 10.<sup>19</sup>

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<sup>19</sup> SDG 10: Reduce inequality within and among countries. Particularly relevant targets include Target 10.1 by 2030 progressively achieve and sustain income growth of the bottom 40% of the population at a rate higher than the national average; Target 10.2 by 2030 empower and promote the social, economic and political inclusion of all irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status.

As suggested by PFMO<sup>20</sup>, the review will also consider (the likely) impacts of programmes on UN Secretary General's High-Level Panel's (UNHLP) **seven drivers of Women's Economic Empowerment (WEE)**<sup>21</sup>. This would entail assessing the extent to which programme design addresses these key drivers (as they relate to the specific country/sector contexts) and whether programme strategies proposed align with 'good practice' strategies.

Specifically, the Year 1 study will explore to what extent projects and programmes have conducted **situational analysis**<sup>22</sup> on G&I and consulted relevant groups, and how the identified barriers are then **addressed and opportunities created in programme policies, practices, budgets and structures**, and to what extent programmes are targeting specific groups of women or other excluded groups.

Additionally, the evaluation will assess how **programme processes and mechanisms for selecting, procuring, contracting/managing** and the codes of conduct for **suppliers and implementing partners** (both UK- and Southern country-owned) address G&I issues. Depending on how much progress programmes have made in selecting suppliers, the Y1 evaluation will also consider whether UK firms that directly engage with the Fund follow socially responsible business practices (Ethical Trading Initiative (ETI) Base Code<sup>23</sup> and PFMO G&I Policy) in their delivery of Prosperity Fund programmes. As the ETI Base Code only applies to firms that are ETI members, the evaluation will restrict itself to considering the involvement of UK firms in these schemes and the contribution that this could make to the achievement of the primary purpose of the Fund. The assessment would consist of a review of Fund and programme-specific UK business documentation and interviews with UK businesses and Fund offices in country.

### ***Sample and timing***

The Year 1 Thematic G&I Evaluation will cover all programmes and will take place between April 2018-May 2019, first starting with a review of business cases (BCs), with in-country visits and interviews taking place towards the end of 2018/start of 2019.

### ***Broad methods***

The evaluation would be conducted in a participatory fashion, stressing the importance of learning and adaptation based on the findings. As much as is feasible, the E&L team will ask programmes to input to the review questions and design.

The E&L team understands that PFMO is planning for programmes to conduct a **self-assessment against a G&I process indicator** (indicator and guidance under discussion in PFMO) within the Annual Review cycle, and would like the same exercise to feed into the Year 1 Thematic G&I Evaluation. Other methods to be used are outlined in Table 2.

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<sup>20</sup> PFMO (Jan 2018) E&L Approach Paper to Gender: Consolidated Feedback

<sup>21</sup> UNHLP (2017) Seven key drivers of women's economic empowerment: Tackling adverse norms and promoting positive role models; Ensuring legal protection and reforming discriminatory laws and regulations; Recognising, reducing and redistributing unpaid work and care; Building assets – Digital, financial and property; Changing business culture and practice; Improving public sector practices in employment and procurement; Strengthening visibility, collective voice and representation.

<sup>22</sup> Including whether these have conducted ex-ante social impact assessment assessing the likely impact on women and men, boys and girls other excluded groups.

<sup>23</sup> Ethical Trading Initiative (ETI) Base Code <https://www.ethicaltrade.org/eti-base-code>

The Year 1 Evaluation will serve as an early overview of **compliance** and **enable timely course correction**, while also acting as a **baseline**. The information will be analysed and presented, and recommendations made, by ‘families’ of programmes and by country. The study will enable programmes to understand their strengths and weaknesses, and provide concrete suggestions for improvement in contextual analysis, intervention design, programme procurement, contracting and management of suppliers, implementation and progress monitoring as this relates to G&I. Good Practice Papers will be developed after this review to share with programme managers.

**Table 2: Broad methods for the Year 1 Thematic G&I Evaluation**

Broad methods for the Year 1 Thematic G&I Evaluation	
<b>Desk review</b>	<ul style="list-style-type: none"> <li>Review of business cases and Fund/programme documentation, including programme processes and mechanisms for procurement/supplier codes of conduct</li> <li>Analysis of literature (for instance drawing on UNHLP’s study on Women’s Economic Empowerment) on the drivers of women’s/other excluded groups’ economic empowerment in relation to families of programmes (infrastructure etc.) and by country, to understand to what extent and how well programmes are addressing these.</li> </ul>
<b>Assessment against PFMO G&amp;I markers</b>	<ul style="list-style-type: none"> <li>Programme staff self-assessment using the suggested PF gender indicator/traffic light system (either through an on-line tool, or during E&amp;L programme visits).</li> <li>Comparison to evaluators scores on these markers.</li> </ul>
<b>Interviews</b>	<ul style="list-style-type: none"> <li>Programme managers and Fund staff in country</li> <li>Small number of business associations/NGOs representing women and other excluded groups, to explore their views on how the PF is addressing the most pertinent drivers of economic empowerment, and to seek their views on the quality of Fund engagement/consultation to date.</li> <li>Contracted suppliers (both UK and Southern-country-owned)</li> </ul>
<b>Sense-making, validation of findings, and planning next steps</b>	<ul style="list-style-type: none"> <li>Face-to-face engagement/meetings jointly with Fund/ programme staff to sense-check, validate and plan how to action recommendations (dependent on resources and staff time).</li> <li>These meetings could take place during programme manager meetings (feasibility and timings to be verified) to maximise engagement/participation in planning the next steps/actioning recommendations participation and use of programme staff time.</li> </ul>

The **scope and scale of the Year 1 Thematic G&I Evaluation would not differ substantially under Option 2 or 3**. However, under Option 3, evaluators (using the same methods and tools) would also consider to what extent programmes are designed to deliver transformative interventions. (Please see Table 3.)

### Later Thematic G&I Evaluation

The later thematic G&I evaluation will be conducted in years 3-4 or as an end line in 2021 (timing to be discussed with PFMO). Considerations include whether a later Thematic Evaluation would serve as an end line or feed into learning and course correction during the lifetime of the Fund.

The aim of the study is to assess what progress programmes (and suppliers) have made on G&I since the Year 1 baseline and what they are achieving. The study will follow up on programme design, management, monitoring and implementation mechanism **compliance**

with **GEA/PFMO gender policy/guidance**. It will explore what **accountability mechanisms and incentives** programmes have created to ensure suppliers address G&I issues. Conversely, the study will assess how **suppliers and implementing partners (IPs)** have taken G&I issues into account in their project design and implementation and what outputs and intended and unintended intermediate outcomes projects are achieving.

The evaluation will also follow up on the compliance of **UK firms that directly engage** with the Fund to socially responsible business practices (ETI Base Code and PFMO G&I Policy) in their delivery of Fund programmes. The assessment will be conducted through a review of Fund and programme-specific UK business documentation and interviews with UK businesses and Fund offices in country.

The evaluation will also assess what **outputs and intermediate outcomes** programmes have achieved. We anticipate that at this stage, benefits will mainly comprise of changes to the **business environment** (e.g. gender-responsive rules and regulations and institutional and policy changes) **benefits to businesses** owned by women/other excluded groups (e.g. institutional changes, access to credit facilities) or **infrastructure design** that is G&I-responsive. Benefits, such as access to services or infrastructure, jobs and income may take longer to materialise. At years 3-4 we do not anticipate that programmes would be at a stage to enable the evaluation to assess how the ultimate beneficiaries (women, girls, men and boys) have gained in practice. The evaluation will gauge whether programmes are moving in the right direction and are likely to yield benefits to women and other excluded groups. The possibilities to conduct data collection with beneficiaries of services will be discussed with PFMO when more is known about programme implementation timelines. Table 3. on p.13 outlines the focus and methods proposed for this evaluation.

### **Sample**

The evaluation is likely to use a case study approach, the focus of which would depend partly on programme manager learning needs. Case studies will be selected from ‘families’ of programmes to enable learning about the gender implications of specific Theories of Change (TOC), i.e. how change happens for women and other excluded groups, and how different Fund interventions in different contexts contribute to these changes.

Possible criteria for case study selection are geography, size of investment, types of project support or types of change/outcomes that the interventions are seeking to achieve (policy influence, capacity). Other criteria could be issues/themes/projects that are of strategic importance to the whole Fund or programmes/ projects that offer good learning (i.e. those that have made good or low progress on G&I).

The number of ‘cases’ to be selected will depend on considerations such as time, feasibility and resources. At this stage, at least five are suggested, but the number will be finalised after the Year 1 Thematic G&I evaluation. Sufficiently large samples of similar interventions (samples to be discussed with the PFMO) will allow generalisation across programmes/families and ensure wider relevance of findings for the rest of programmes.

### **Broad methods**

The later thematic evaluation will draw on information from other comparable or relevant evaluations being conducted. Where possible, case studies will be planned to combine or coincide with programme (or family-level) evaluations, to minimise evaluation fatigue, but also to ensure ‘local’ relevance of the wider evaluation findings. However, separate evaluation field

work, such as surveys and qualitative data collection may be necessary. Table 3. outlines the focus and methods proposed for this evaluation.

**Table 3: Broad methods for Later Thematic G&I Evaluation**

Broad methods- Later Thematic G&I evaluation	
Focus	Method
<p><b>Programme due diligence and risk mitigation with GEA/PFMO G&amp;I Guidance</b></p> <ul style="list-style-type: none"> <li>• Compliance of design, management, monitoring and implementation mechanisms of projects to GEA/PFMO gender policy/guidance</li> <li>• Accountability mechanisms and incentives programmes have created to ensure contractors/suppliers address G&amp;I issues</li> </ul>	<p><b>Document review, Programme self-assessment, interviews</b></p> <ul style="list-style-type: none"> <li>• Programme staff self-assessment using the suggested PF gender indicator/traffic light system (anonymity of responses will be explored) (either through an on-line tool, or during E&amp;L programme visits).</li> <li>• Review of programme/project documentation</li> <li>• Interviews with programme staff</li> </ul>
<p><b>Contractor and supplier project design and implementation</b></p> <p>Integration of G&amp;I into supplier project design and implementation:</p> <ul style="list-style-type: none"> <li>• Project scoping to understand women's and men's different needs, priorities and barriers to accessing services or employment</li> <li>• Needs reflected in project design</li> <li>• outputs and intended and unintended intermediate outcomes</li> </ul>	<p><b>Document review, interviews</b></p> <ul style="list-style-type: none"> <li>• Analysis of contextual information relevant to women's and other excluded groups' economic empowerment in specific country/sector contexts</li> <li>• Review of contractor, programme/project documentation</li> <li>• Interviews with programme staff</li> <li>• Surveys with businesses</li> <li>• Interviews with suppliers/businesses benefiting from PF interventions</li> <li>• Interviews with experts, NGOs/organisations representing women/excluded groups</li> </ul>
<p><b>UK firm compliance with ETI Base Code/GEA/PFMO G&amp;I policy in delivery of Fund programmes</b></p> <ul style="list-style-type: none"> <li>• Business procurement, contracting and implementation compliance with ETI Base Code</li> </ul>	<p><b>Document review, interviews and surveys</b></p> <ul style="list-style-type: none"> <li>• Review of Fund documentation</li> <li>• Review of UK business documentation for Fund programmes</li> <li>• Survey/interviews with contracted UK businesses</li> <li>• Interviews with Fund offices in country</li> </ul>
<p><b>Benefits to businesses and business environment</b></p> <ul style="list-style-type: none"> <li>• Gender-responsive rules and regulations</li> <li>• Benefits to businesses owned by women/other excluded groups (access to credit facilities)</li> <li>• Or infrastructure design that is G&amp;I-responsive</li> </ul>	<p><b>Document review, interviews and surveys</b></p> <ul style="list-style-type: none"> <li>• Interviews with programme staff</li> <li>• Surveys with businesses</li> <li>• Interviews with suppliers/businesses benefiting from PF interventions</li> <li>• Interviews with experts, NGOs/organisations representing women/excluded groups</li> <li>• Interviews with other development partners, such as Asian Development Bank (ADB) and the Inter-American Development Bank (IADB)</li> <li>• Interviews with national/state/municipal governments</li> </ul>
<p><b>Benefits to other institutions and state/municipal/national governments</b></p> <ul style="list-style-type: none"> <li>• Institutional and capacity changes</li> </ul>	<p><b>Document review and interviews</b></p> <ul style="list-style-type: none"> <li>• Interviews with relevant institutions and government agencies</li> <li>• Review of relevant documentation (regulations, policies etc.)</li> </ul>

Option 2 and 3 differ: Years 3-4 Thematic Evaluation in Option 3 covers a larger sample of programmes/projects, as well as the addition of a focus on measuring how the Fund and its suppliers have designed their projects with aim of influencing changes in institutions, policy, laws and social norms (and whether progress towards these has been achieved). Studies in Option 2 will document examples of transformative programme practices and results (as these arise), however, these will not be a major focus of the enquiry. Table 4. summarises these differences.

**Table 4: Summary of Thematic G&I Evaluations by Option**

THEMATIC EVALUATIONS			
Option	Evaluation product	Outcomes/focus areas to assess	Scale
<b>Option 2 Empowerment</b>	Year 1 Thematic G&I Evaluation	Due diligence and risk mitigation with GEA/PFMO G&I Guidance	All programmes involved
	Years 3-4 Thematic G&I Evaluation	Benefit flows (assets, capabilities, opportunities) to women and other excluded groups	Fewer programmes/cases involved
<b>Option 3 Transformation</b>	Year 1 Year 1 Thematic G&I Evaluation	Due diligence and risk mitigation with GEA/PFMO G&I Guidance	All programmes involved
	Years 3-4 Thematic G&I evaluation	Benefit flows (assets, capabilities, opportunities) to women and other excluded groups  Changes in institutions, policy, laws and social norms	More programmes, case studies involved  Added focus of measurement on social norms and institutional change

### 3.4 G&I in programme and family-level evaluations

Thematic G&I evaluations in years 3-4 as well as synthesis activities at Fund level will draw on programme and family-level evaluations. The following sections will set out what G&I related EQs these evaluations will answer, and how G&I input to these evaluations will be organised.

#### 3.4.1 G&I in programme evaluations

Programme evaluations will answer key evaluation questions (EQs 2-3, 5-7, 9, 11) including those relevant to G&I. Programme evaluations will seek to focus on the most relevant G&I issues in the programme context, and at a minimum, will assess the level of programme GEA compliance (i.e. how intervention choice and design have considered the differentiated impact on women and men, boys and girls) to ensure no harm is done.

To ensure that questions that have relevance to G&I will be answered systematically by programme evaluations, guidance on minimum questions (including those related G&I) to be answered by all evaluations will be developed and provided to E&L team/programme managers. This will be supported by other G&I guidance and training (please see section 3.5).

The **Year 1 Thematic G&I Evaluation** will form a 'baseline' for all programmes on the level of compliance of programme analysis, design and management processes and systems to GEA /PFMO G&I guidance. The findings of this early evaluation will be used to inform the focus of each programme evaluation in subsequent years, to ensure issues are followed up on a consistent basis.

The **Year 3-4 Thematic G&I Evaluation** will synthesise evidence from programme evaluations. This means that questions for programme and thematic evaluations will have to align to some extent. The Year 3-4 Thematic G&I Evaluations will also require case studies at project or programme level, necessitating engagement and further data collection at programme level.

The G&I specialist will work alongside teams and programme evaluation leads who liaise with relevant programme managers to design and implement evaluations. The G&I specialist will aim to provide inputs at least at the initial design and analysis stages. The precise nature of the G&I specialist's involvement in programme evaluations will be dependent on the focus of programmes and the available G&I skills and experience in programme evaluation teams. For instance, the G&I specialist could be more heavily involved in evaluations of programmes that have more of a G&I focus, or conversely in evaluations of programmes that need extra input on G&I. As explained in section 3.1, specific guidance will be developed for this purpose.

The scale and focus of programme evaluations are likely to be broader in Option 3, as the later Thematic G&I Evaluation would cover more cases and programmes. Table 5. summarises these differences.



**Table 5: Summary of Programme Evaluations by Option**

Option	Evaluation product	Outcomes/focus areas to assess	Scale
<b>Option 2 Empowerment</b>	Programme evaluations	Due diligence and risk mitigation with GEA/PFMO G&I Guidance Benefit flows (assets, capabilities, opportunities) to women and other excluded groups	Smaller number of focal areas to assess Smaller sample of programme evaluations address G&I
<b>Option 3 Transformation</b>	Programme evaluations	Due diligence and risk mitigation with GEA/PFMO G&I Guidance Benefit flows (assets, capabilities, opportunities) for women and other excluded groups Changes in institutions, policy, laws and social norms	More focal areas to assess Larger number of programmes evaluations address G&I issues

### 3.4.2 G&I in family-level evaluations

Family-level evaluations (that explore facets of the ‘families’ (e.g. infrastructure, trade, health) of intermediate-outcome causal pathways, by family of interventions) provide a systematic way of addressing G&I evaluation questions, as these are commissioned at the Fund level. In line with other evaluations, family-level evaluations will assess the level of intervention GEA compliance to ensure no harm is done. After the first year’s formative programme evaluations, interventions will be identified for further evaluations according to ‘families’ of investment. The importance to women’s/other excluded groups economic empowerment and the possibility of generating useful findings on G&I should also drive this prioritisation.

Family-level evaluations will select case studies from ‘families’ of programmes, across different geographies, size of investment, types of project support or types of change/outcomes that the interventions are seeking to achieve (policy influence, capacity). Sampling by families would enable learning about the gender implications of specific TOCs, i.e. how change happens for women and other excluded groups, and how different Fund interventions in different contexts contribute to these changes.

In the same way as in programme evaluations, primary data collection conducted through family-level evaluations will provide information to be used in Thematic G&I Evaluations, provided data collection processes are aligned. The process for the involvement of the G&I specialist is the same as in programme evaluations and in synthesis.

The main difference between Options 2 and 3 in family-level evaluations is in Option 3 proposing more focal areas of assessment (changes in institutions, policy, laws and social norms), and possibly more sampled interventions. Table 6. below outlines these differences.

**Table 6: Summary of Family-level Evaluations**

FAMILY-LEVEL EVALUATIONS			
Option	Evaluation product	Outcomes/focus areas to assess	Scale
<b>Option 2 Empowerment</b>	Family-level evaluations	Due diligence and risk mitigation with GEA/PFMO G&I Guidance Benefit flows (assets, capabilities, opportunities) to women and other excluded groups	Smaller number of sampled interventions
<b>Option 3 Transformation</b>	Family-level evaluations	Due diligence and risk mitigation with GEA/PFMO G&I Guidance Benefit flows (assets, capabilities, opportunities) to women and other excluded groups <b>Changes in institutions, policy, laws and social norms</b>	Larger number of sampled interventions

### 3.5 Synthesis of G&I-related findings

All findings generated from different evaluations contribute to a set of synthesis products (some of these specifically focused on G&I), both at family and Fund level.

The synthesis of findings relating to G&I will answer higher-level questions at the Fund level, across a variety of programmes to learn about specific TOCs at intervention level and their gender implications. This means understanding how change happens for women and other excluded groups, and how different Fund interventions in different contexts contribute to these changes (what works where, with whom and under which conditions). This will help the evaluation identify contributing factors to gender and inclusion-specific outcomes in a systematic way.

G&I findings will be synthesised up to Fund level using data that is available, whether from thematic, programme or family-level evaluations. Findings on G&I will be analysed and synthesised according to similar types of ‘families’ of interventions. The findings from these families will then be ‘compared’, highlighting commonalities and differences.

The **G&I specialist will work alongside E&L staff leading on** family-level (or Programme) evaluations that liaise with relevant programme managers to design and implement an evaluation. The lead E&L staff member will ensure that the relevant evaluation questions (including those on G&I) are designed into evaluations and analysed to give a coherent output. All staff working on these evaluations will also receive guidance documents and briefing on G&I. A synthesis lead (in some cases this may be the G&I specialist) will support and quality assure products developed by technical specialists who are leading on Thematic or Family-level evaluations.

G&I issues will be integrated into **guidance, instruments and templates to support synthesis**, that will give guidance on evaluation questions, data extraction and analysis. Each evaluation will have a section related to G&I/EQ9; attempts will also be made to mainstream (as much as feasible) G&I into other sections of reports.

The G&I specialist will then be responsible for **collating G&I-related information into one synthesis** at the ‘family’ or Fund level. Members of family-level/programme evaluation teams will have the opportunity to review and comment on these draft G&I synthesis products.

It is not possible to estimate the human resources needed for G&I synthesis at this point, as these will depend on the number of and scale of evaluations to be undertaken. However, we envisage that **synthesis under Options 2 and 3 would follow the same processes and require the same level of effort.**

### 3.6 Learning

Both Options 2 and 3 offer specific G&I learning mechanisms as well as mainstreaming G&I issues into wider learning products and processes.

- **G&I peer learning process:** A G&I peer learning process could include a global G&I peer learning group that would meet online and if possible, in person, once per year. The purpose of the group would be to learn from others in the programme and potentially also from external parties. This group could provide a space for programmes to showcase their learning and best practice, providing for early implementers/effective practices to act as champions for change. The group could also potentially invite participants from external private sector organisations in relevant sectors to share how other like-minded organisations have been working on the issues, and to situate learning within the broader context. A scoping of suitable external knowledge sharing networks and platforms will be conducted after inception.
- **Mainstreaming:** G&I issues will be mainstreamed into learning products and processes (specific G&I sections in learning products, G&I issues mainstreamed throughout other learning products and meetings). The G&I specialist in the E&L team will provide support for making learning-focused communications and products gender-sensitive and adapted for different audiences, such as suppliers. The E&L team will also ensure that findings and learning products on G&I will be fed into the five online Thematic Support Groups based on ‘families’ of programmes, as relevant.

The first learning opportunities after Year 1 could focus on disseminating and discussing the findings of the First Thematic G&I Evaluation (made available in a Good Practices Paper), as well as planning follow-up actions to the recommendations. The learning products could be made relevant to each of the five learning platforms based on ‘families’ of programmes, and disseminated and discussed within these.

We envisage that the level of interest and engagement in G&I-specific learning groups will vary from context to context and with the programmatic focus areas; often engagement can be stronger when the in-country offices take a lead on this and if there are new, relevant insights being harvested and shared. There is a risk that G&I-specific groups will have less active participation, as they could be perceived not to be applicable to the work of many programme staff. The PFMO Gender Adviser could help identify potential champions, such as Senior Responsible Officers (SROs), to take the lead in generating interest and participation. The E&L team will incentivise learning by making the information relevant and tailored to the needs and uses of different audiences; work with emergent opportunities and constraints; build in learning touch points within the evaluation cycle where discussion of G&I would build

relevance and ownership; and facilitate responsive peer learning support (*please see Learning and Knowledge Management Plan*).

The assumption is that more work will be done in Year 1 to understand who the interested audiences are, their needs and preferred learning styles and formats with regards to G&I. This would ensure that the G&I learning methods and formats are focused on demand and use.

Acknowledging that programme (and project) staff are busy, it will be important to ensure that learning processes and platforms are manageable in number (as the same staff members are likely to cover multiple focal areas and therefore attend multiple learning fora/processes) and that these do not duplicate each other, and do not create ‘learning fatigue’.

**Options 2 and 3 differ mainly in the scale/frequency of products and meetings (some of them possibly face-to-face).** Table 7. summarises these differences.

**Table 7: Summary of Learning activities by Option**

LEARNING		
Option	Learning product/activity	Scale
<b>Option 2 Empowerment</b>	Mainstreaming G&I into learning products and processes Small-scale G&I peer learning group	Small-scale (in terms of number of products, 1 meeting face-to-face/year)
<b>Option 3 Transformation</b>	Mainstreaming G&I into learning products and processes G&I peer learning group	More frequent activities, including face-to-face

### 3.7 Training of M&R and E&L staff on G&I

M&R and E&L teams will produce joint **training plans** and materials for their own staff on gender and inclusion. This will ensure that M&R and E&L teams are on the same page about what G&I and GEA compliance practically means in PF monitoring and reporting, evaluation and learning. It will also ensure that M&R and E&L messages and advice to countries are aligned. The M&R and E&L contractors will deliver the training separately to their own teams, but the materials will be developed together. The training will be mandatory and the materials will form a core part of the E&L Fund Evaluation pack for new starters.

The materials will cover:

#### **Development of G&I training guidance and materials**

- Induction materials on gender and inclusion for all new and existing M&R and E&L team members (which integrates PFMO gender and inclusion policy and guidance, including the proposed gender markers, and information on GEA and best practice for gender and social inclusion);
- Do No Harm guidelines specific to MREL activities of the Fund;
- Guiding protocol on gender-responsive evaluation and monitoring, including ethical and inclusive collection, analysis and use of disaggregated data with women and other excluded groups.

In addition to this, specific gender and inclusion guidance will be tailored for each evaluation, to ensure that it addresses issues specific to the interventions being evaluated.

**Timing**

Guidance will be shared with staff and briefings (to the extent possible face-to-face) provided during:

- MREL team staff induction/orientation process;
- Briefing after the focus and evaluation products have been agreed annually; and
- During the planning and design process of evaluations and for whole research teams before research work starts.

**Next steps**

- The M&R and E&L contractor will discuss the content and process of producing joint training materials starting on 20 February. This discussion will feed into higher-level outline of general M&R training for the M&R Hub employees.
- The M&R and E&L contractor and will produce a more detailed joint training content plan in March/April. The exact processes for training will then be discussed in April/May. PFMO will be part of these conversations.

The scale of training differs in Options 2 and 3: Option 3 has more in-depth studies with more countries involved and would require more E&L staff members to be trained. Table 8. summarises these differences.

**Table 8: Summary of Training on G&I by Option**

TRAINING		
Option	Training materials/activity	Scale
<b>Option 2 Empowerment</b>	Induction materials on gender and inclusion for all new and existing M&R and E&L team members Do No Harm guidelines specific to MREL activities of the Fund Guiding protocol on gender-responsive evaluation and monitoring, including ethical and inclusive collection with women and other excluded groups Training to MREL team staff during induction and evaluation orientation processes	Smaller samples of programmes involved in evaluations with fewer E&L team members to train
<b>Option 3 Transformation</b>	As above	Larger samples of programmes/projects, with more E&L team members train

## 4 References

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## Annex 1 Table of Options

Option	Evaluation Question	Sub-questions	Outcomes/focal areas of inquiry	Method	MEL activity scale	Resource need
<b>Option 2 EMPOWERMENT</b>						
<p><b>Compliance with GEA/PFMO G&amp;I Policy and Guidance</b></p> <p><b>Due diligence</b></p> <p><b>Risk mitigation</b></p>	<p><b>EQ 10. To what extent have the Prosperity Fund interventions contributed to results that support gender equality, women's economic empowerment and social inclusion in line with the UK's Gender Equality Act and the Prosperity Fund Policy and Guidance and the Prosperity Fund Gender and Inclusion Framework?</b></p>	<p><i>a) The extent to which the programme has put in place G&amp;I-responsive Fund and programme mechanisms</i></p> <p><i>b) The extent to which the analysis, consultation, design, implementation, monitoring of programmes is G&amp;I-responsive/in line with the law and internal PF policies</i></p>	<p><b>Programme diagnostics, design, M&amp;E and implementation have:</b></p> <ul style="list-style-type: none"> <li>• <b>Impact assessment</b> on potential benefits and losses on women, men, girls and boys and other excluded groups/poorer income quintiles</li> <li>• <b>Measures to integrate G&amp;I across programme cycle</b> (design, M&amp;E)</li> <li>• <b>Risks and unintended negative consequences</b> on G&amp;I identified, mitigate and monitored</li> <li>• <b>Consultation mechanisms and practice</b> with women/excluded groups or organisations representing them</li> <li>• <b>Women's/other excluded groups' practical needs addressed</b> (for instance household care)</li> </ul>	<p><b>Year 1 Thematic G&amp;I Evaluation</b></p> <ul style="list-style-type: none"> <li>• Desk review of all programme business cases and programme documentation to assess compliance with ID(GE)A and internal PFMO G&amp;I policy and guidance</li> <li>• Desk review of programme selection, procurement, contracting/management and codes of conduct for suppliers and implementing partners (both UK- and Southern country-owned) to assess compliance to socially responsible business practices</li> <li>• Desk review of contextual information to assess likely impact of programmes drivers of WEE</li> <li>• Programme staff self- assessment using the PFMO gender markers</li> <li>• Scoring by evaluators on PFMO gender markers</li> <li>• Interviews with programme staff</li> <li>• Interviews with other stakeholders, such as organisations representing women's economic/business groups/ other excluded groups</li> <li>• Interviews with other development partners, such as Asian Development Bank (ADB) and the Inter-American Development Bank (IADB)</li> </ul>	<p>Thematic evaluation in Year 1</p> <p>Years 3-4 Thematic evaluation (small scale)</p> <p>Programme/family-level evaluations</p> <p>A small-scale G&amp;I peer learning process and mainstreaming of G&amp;I into overarching learning platforms/products</p>	<p>Requires long-term G&amp;I expertise on the E&amp;L team, covering smaller sample of programmes and a small-scale G&amp;I learning process.</p>



Option	Evaluation Question	Sub-questions	Outcomes/focal areas of inquiry	Method	MEL activity scale	Resource need
				<ul style="list-style-type: none"> <li>Sense-making/validation/recommendation sessions with programme staff</li> </ul> <p><b>Year 3-4 Thematic G&amp;I Evaluation</b></p> <ul style="list-style-type: none"> <li>Focus on the above+ benefit realisation (please see below)</li> </ul> <p><b>Programme and family-level evaluations assess due diligence and GEA compliance, and integrate G&amp;I questions on a systematic basis</b></p>		
<p><b>Benefit flows to women and other excluded groups:</b></p> <p><b>Assets</b></p> <p><b>Capabilities</b></p> <p><b>Opportunities</b></p>	<p><b>EQ 10. To what extent have the Prosperity Fund interventions contributed to results that support gender equality, women's economic empowerment and social inclusion in line with the UK's Gender Equality Act and the Prosperity Fund Policy and Guidance and the Prosperity Fund Gender and Inclusion Framework?</b></p>	<p><i>c) Results achieved by the PF that have contributed to gender equality, women's economic empowerment and social inclusion</i></p>	<p><b>Suppliers address G&amp;I issues in project scoping, design and implementation to achieve changes in:</b></p> <p><b>Business environment</b></p> <ul style="list-style-type: none"> <li>G&amp;I-responsive policies and laws, regulations and procedures</li> <li>Institutional and capacity changes in state/municipal/national government institutions</li> </ul> <p><b>Trade and market opportunities</b></p> <ul style="list-style-type: none"> <li>Firms owned by women/other excluded groups in under-</li> </ul>	<p><b>Year 1 Thematic G&amp;I Evaluation</b></p> <ul style="list-style-type: none"> <li>Outline of possible impacts on drivers of WEE</li> </ul> <p><b>Year 3-4 Thematic G&amp;I Evaluation</b></p> <ul style="list-style-type: none"> <li>Sampling based on 'families' of programmes</li> <li>Review of documentation (from programmes/projects and suppliers)</li> <li>Review of M&amp;R information/programme reporting/other administrative and management information</li> <li>Review of secondary data</li> <li>Review of policies and legislation</li> <li>Desk review of programme selection, procurement, contracting/management and codes of conduct for suppliers and implementing partners (both UK- and Southern country-owned) to assess compliance to socially responsible business practices</li> </ul>	<p>Programme/family-level evaluations</p> <p>Thematic evaluation in Year 1</p> <p>Years 3-4 Thematic evaluation (small scale)</p> <p>Small-scale, standalone gender and inclusion and peer learning process and mainstreaming in learning</p>	<p>Requires long-term G&amp;I expertise on the E&amp;L team, covering smaller sample of programmes and a small-scale G&amp;I learning process.</p>

Option	Evaluation Question	Sub-questions	Outcomes/focal areas of inquiry	Method	MEL activity scale	Resource need
			<p>represented sectors</p> <ul style="list-style-type: none"> <li>• New markets accessed by women/women-owned SMEs</li> </ul> <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>• Women's/excluded groups'/ poorer-income quintiles needs reflected in project/service design</li> </ul> <p><b>Strengthened competitiveness and productivity of businesses</b> (size, profitability of businesses owned by women/other excluded groups)</p> <p><b>Voice and agency</b></p> <ul style="list-style-type: none"> <li>• Processes and mechanisms to involve women and other excluded groups in decision-making processes, planning and M&amp;E</li> </ul>	<ul style="list-style-type: none"> <li>• Interviews and Focus Group Discussions with PF/Programme staff, businesses</li> <li>• Interviews or surveys with business owners</li> <li>• Interviews with women's organisations/organisations representing women's business groups</li> <li>• Interviews with other development partners, such as Asian Development Bank (ADB) and the Inter-American Development Bank (IADB)</li> <li>• Interviews with national/state/municipal governments</li> </ul> <p><b>Programme and family-level evaluations assess due diligence and GEA compliance, and integrate G&amp;I questions on a systematic basis</b></p>		

Option	Evaluation Question	Sub-questions	Outcomes/focal areas of inquiry	Method	MEL activity scale	Resource need
<b>Option 3 TRANSFORMATION</b>						
<p><b>Compliance with GEA/PFMO G&amp;I Policy and Guidance</b></p> <p><b>Due diligence</b></p> <p><b>Risk mitigation</b></p>	<p><b>EQ 10. To what extent have the Prosperity Fund interventions contributed to results that support gender equality, women's economic empowerment and social inclusion in line with the UK's Gender Equality Act and the Prosperity Fund Policy and Guidance and the Prosperity Fund Gender and Inclusion Framework?</b></p>	<p><i>a) The extent to which the programme has put in place G&amp;I-responsive Fund and programme mechanisms</i></p> <p><i>b) The extent to which the analysis, consultation, design, implementation, monitoring of programmes is G&amp;I-responsive/in line with the law and internal PF policies</i></p>	<p>As Under Option 2 and + transformative practices in Fund/ programme management/supplier mechanisms:</p> <ul style="list-style-type: none"> <li>• <b>G&amp;I in-house mechanisms and expertise</b></li> <li>• <b>G&amp;I impact assessment, baselining, G&amp;I strategy</b></li> <li>• <b>Programme tackles women's/other excluded groups strategic needs</b></li> <li>• <b>Regular review and learning</b> on G&amp;I in PF programming</li> <li>• <b>Accountability</b> mechanisms for suppliers on G&amp;I</li> <li>• Suppliers with G&amp;I capacity and budgets</li> <li>• contractual mechanisms and incentives to increase women's and other excluded groups' economic participation</li> <li>• Women's/other excluded groups organisations are active partners in programme design delivery and review</li> </ul>	<p><b>Year 1 Thematic G&amp;I Evaluation</b></p> <ul style="list-style-type: none"> <li>• Transformative elements of programme diagnostics, design, implementation, M&amp;E will also be examined</li> </ul> <p><b>Year 3-4 Thematic Evaluation</b></p> <ul style="list-style-type: none"> <li>• Transformative elements of programme diagnostics, design, implementation, M&amp;E will also be examined</li> </ul> <p><b>Programme and family-level evaluations assess due diligence and GEA compliance, and integrate G&amp;I questions on a systematic basis</b></p>	<p>Programme/family-level evaluations assess more outcomes/areas of change</p> <p>More comprehensive standalone qualitative G&amp;I thematic evaluation study (as outlined in option 2, but of a larger selection of programmes and projects)</p> <p>G&amp;I peer learning group with more frequent activities, including face-to-face</p>	<p>Requires long-term G&amp;I expertise on the E&amp;L team, covering more sampled programmes/projects as well as a more in-depth G&amp;I learning process.</p>
<p><b>Benefit flows to women and other excluded groups:</b></p>	<p><b>EQ 10. To what extent have the Prosperity Fund interventions contribu</b></p>	<p><i>c) Results achieved by the PF that have contributed to</i></p>	<p>As Under Option 2</p>	<p><b>Later Thematic Evaluation</b></p> <ul style="list-style-type: none"> <li>• As Under Option 2, but larger number of</li> </ul>		<p>Requires long-term G&amp;I expertise on the E&amp;L team, with</p>

Option	Evaluation Question	Sub-questions	Outcomes/focal areas of inquiry	Method	MEL activity scale	Resource need
<p><b>Assets</b></p> <p><b>Capabilities</b></p> <p><b>Opportunities</b></p>	<p>ted to results that support gender equality, women's economic empowerment and social inclusion in line with the UK's Gender Equality Act and the Prosperity Fund Policy and Guidance and the Prosperity Fund Gender and Inclusion Framework?</p>	<p><i>gender equality, women's economic empowerment and social inclusion</i></p>		<p>programmes and projects to be assessed</p> <p><b>Programme and family-level evaluations assess due diligence and GEA compliance, and integrate G&amp;I questions on a systematic basis</b></p>		<p>more sampled programmes/pr oject, as well as a more in-depth G&amp;I learning process.</p>
<p><b>Institutional and societal changes in power relations:</b></p> <p><b>Changes in institutions, policy, laws and changes in social norms (attitudes, behaviours)</b></p>	<p><b>EQ 10. To what extent have the Prosperity Fund interventions contributed to results that support gender equality, women's economic empowerment and social inclusion in line with the UK's Gender Equality Act and the Prosperity Fund Policy and Guidance and the Prosperity Fund Gender and Inclusion Framework?</b></p>	<p><i>c) Results achieved (including institutional and societal changes) by the PF that have contributed to gender equality, women's economic empowerment and social inclusion</i></p>	<p><b>Institutional, legal and policy change to enable women's economic/other excluded groups' empowerment</b></p> <p><b>Accountability mechanisms</b> for quality service delivery</p> <p><b>Representation of women and excluded groups in infrastructure governance/planning/decision making bodies</b></p> <p><b>Employer mechanisms/policies including quotas and targeted support for women/other excluded groups</b></p> <p><b>Men's, women's, employers, social norms</b> regarding</p>	<p><b>Programme and family-level evaluations assess due diligence and GEA compliance, and integrate G&amp;I questions on a systematic basis</b></p> <p><b>Year 3-4 Thematic G&amp;I evaluation</b></p> <ul style="list-style-type: none"> <li>• Policy/legislation review</li> <li>• Review of business-level changes</li> <li>• Interviews/surveys with employer/business owners about attitudes/norms /behaviours about measures to support women's (or that of other excluded groups) full economic participation and their /role/decision-making in the workplace</li> </ul>		<p>Require long-term G&amp;I expertise on the E&amp;L team, covering more programmes to be involved in evaluations, as well as a more in-depth G&amp;I learning process.</p>

Option	Evaluation Question	Sub-questions	Outcomes/focal areas of inquiry	Method	MEL activity scale	Resource need
			women's economic participation <b>Recognition</b> , redistribution and reduction in <b>women's unpaid care work</b>	<ul style="list-style-type: none"> <li>• Surveys on changes in social norms on women's economic participation/control/decision-making over with women beneficiaries, men</li> <li>• Interviews with decision makers/government officials regarding policy changes</li> <li>• Interviews with other development partners, such as Asian Development Bank (ADB) and the Inter-American Development Bank (IADB)</li> <li>• Interviews with national/state/municipal governments</li> </ul>		