



**Guidance for Addressing Gender
in Evaluations**

IOM Central Evaluation

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Acronyms

CO	Country Office
GBV	Gender-based Violence
GCU	Gender Coordination Unit
GSI	Gender-sensitive Indicator
IOM	International Organization for Migration
LGBTI	Lesbian, Gay, Bisexual, Transgender and/or Intersex
M&E	Monitoring and Evaluation
OIG	Office of the Inspector General
RO	Regional Office
PPR	Project Performance Review
UN-SWAP	United Nations System-wide Action Plan on Gender Equality and the Empowerment of Women
ToR	Terms of Reference
UNEG	United Nations Evaluation Group
UNICEF	United Nations Children's Fund
UN Women	United Nations Entity for Gender Equality and the Empowerment of Women

1. Introduction

IOM strives to improve the promotion of gender equality and the empowerment of all, to provide better and targeted services to its beneficiaries. A firm commitment to overcoming gender discrimination and realising equal opportunities for all, regardless of sex or gender, represent key features of IOM's work, in line with international good practice, as "IOM will not meet its objective of safe, humane and orderly migration for all unless gender equality is taken into account"¹.

In 2012, to enhance its commitment to gender equality, IOM began to implement the United Nations System-wide Action Plan on Gender Equality and the Empowerment of Women (UN-SWAP). In 2015, IOM adopted its Gender Equality Policy 2015-2019, in line with the UN-SWAP. IOM is also striving to meet United Nations Evaluation Group (UNEG) requirements on integrating gender in evaluations.

Integrating gender equality aspects in the overall Monitoring and Evaluation (M&E) processes is in line with IOM's evaluation and monitoring policies where one of the common objectives is "to guarantee inclusion of cross-cutting issues such as gender and accountability to affected populations". This will help IOM to:

- ✓ Improve overall programming and gender mainstreaming by delivering relevant, targeted and efficient services to its beneficiaries; and
- ✓ Understand better what the Organization achieves and reports on in relation to its gender equality mandate and overall results.

Regional Offices (ROs) and Country Offices (COs), with the support of the OIG/Evaluation, are recommended to guide and review the quality of gender equality content in regional- and country-level evaluations, in line with the IOM Project Handbook (Second edition) 2017, the UNEG Handbook for Conducting Evaluations and Guidance on Integrating Human Rights and Gender Equality in Evaluations² 2014, and UN Women Evaluation Handbook on how to Manage Gender-Responsive Evaluation 2015³, which provide detailed and practical examples and guidance on gender-sensitive criteria, indicators and tools.

This Guidance provides a step-by-step approach to help all staff already involved in managing and conducting evaluations to develop gender-sensitive evaluation scopes of work, methodologies and findings. It is primarily meant to inform IOM evaluations but can be useful for partner agencies conducting evaluations, mid-term reviews, monitoring visits and other evaluative work.

The Guidance is a "living document" and may be updated in the event of future revisions of the IOM Gender Equality Policy 2015-2019⁴ and issuance of other gender-specific guidance

¹ <https://governingbodies.iom.int/system/files/en/council/106/C-106-INF-8-Rev1-IOM-Gender-Equality-Policy-2015-2019.pdf>

² <http://www.uneval.org/document/guidance-documents>

³ <http://www.unwomen.org/en/digital-library/publications/2015/4/un-women-evaluation-handbook-how-to-manage-gender-responsive-evaluation>

⁴ <https://www.iom.int/sites/default/files/about-iom/gender/C-106-INF-8-Rev.1-IOM-Gender-Equality-Policy-2015-2019.pdf>

(i.e. the IOM Project Handbook Module 6 on Evaluation⁵). Additional information on useful references, glossary of terms, overview of OIG/Evaluation gender indicators and the UN-SWAP can be found in the Annexes.

1.1 Gender Equality Policy 2015-2019

The Gender Equality Policy requires IOM to have policies and strategies that satisfy the following minimum requirements to ensure gender mainstreaming:

- ✓ Recognise and address the gender-related gaps in programming;
- ✓ Ensure that all IOM beneficiaries have the same opportunities regardless of their sex or gender;
- ✓ Mitigate vulnerabilities to and threats of gender-based violence (GBV); and
- ✓ Ensure equal access and better outcomes for all IOM beneficiaries.

Additionally, the policy sets out IOM's plans for mainstreaming gender, to ensure adequate capacity and resources to fulfil its gender equality⁶ mandate:

- ✓ Update of the gender equality policy and senior management accountability;
- ✓ Gender-responsive performance management including improved gender balance in all IOM offices and mainstreaming gender in programme development, endorsement, implementation and reporting;
- ✓ Project review and endorsement that ensures adequate attention to gender considerations;
- ✓ Capacity assessment to ensure building staff capacity on gender mainstreaming;
- ✓ Capacity development by introducing training on gender-related issues to meet different staff capacity development needs; and
- ✓ Inter-agency coherence through IOM's participation in inter-agency meetings on gender equality and the UN-SWAP.

1.2 Gender Considerations and UN- SWAP

The UN-SWAP constitutes the first accountability framework for gender mainstreaming in the UN system. Its original framework (2012-2017) included a set of 15 common system-wide Performance Indicators towards gender equality, one of them being Evaluation⁷. The updated UN-SWAP framework 2018, also includes Evaluation as one of 17 Performance Indicators. To report on progress against the UN-SWAP Evaluation Performance Indicators, OIG/Evaluation conducts an annual meta-analysis of external evaluations conducted during each calendar year, to assess the level of integration of gender dimensions in the evaluation work.

For each evaluation reviewed, OIG/Evaluation reports on the following criteria:

⁵ <https://intranetportal/Pages/ControlNo.aspx?controlNo=IN/00250/Module6>

⁶ Glossary of terms available in Annex 2.

⁷ <http://www.unwomen.org/en/how-we-work/un-system-coordination/promoting-un-accountability>

- ✓ Gender considerations are integrated in the **Evaluation Scope of Analysis**, and **Evaluation Criteria and Evaluation Questions (EQs)** are designed in a way that ensures gender equality data will be collected;
- ✓ A gender-responsive **Evaluation Methodology, Methods, Tools and Data Analysis Techniques** are selected;
- ✓ The evaluation **Findings, Conclusions and Recommendations** reflect gender analysis; and
- ✓ The entity has commissioned at least one evaluation to assess **Corporate Performance on Gender Mainstreaming** or evaluation of its **GE Policy/Strategy** or equivalent every 5-8 years.

A more extensive explanation and guidance can be found in the updated UN-SWAP Evaluation Performance Indicator Technical Note⁸ and UNEG Guidance on Evaluating Institutional Gender Mainstreaming⁹.

2. Evaluation Core Gender Indicators

This Guidance introduces a set of core **gender-sensitive indicators** to examine concrete progress on the integration of gender into processes of managing and conducting evaluations to be used as **gender evaluability checklist**. Additional information on evaluability assessment can be found in UN Women Evaluation Handbook, p. 38.

Adjustments could be made to the gender-sensitive indicators based on the initial implementation experiences. Additional internal documents that can be used as references include the IOM Project Handbook Module 6 on Evaluation, and the Gender and RBM Guidance¹⁰ and Tip Sheet¹¹. A full glossary of terms can be found in Annex 2. A detailed overview of the core evaluation indicators is provided in Annex 3, which can be covered by the below evaluation questions:

Indicators	Related Questions
For managing evaluations:	
1. Evaluation ToR contains gender references in the scope of work.	✓ How are gender dimensions considered by the scope of work, purpose and feasibility of evaluation?
2. The process of commissioning for the evaluation contains gender references.	✓ How are gender dimensions reflected across the skills and background of the evaluation team?
3. Implementation and reporting under evaluation contain gender references and analysis.	✓ How are gender dimensions reflected across evaluation work plan and outputs?

⁸ <http://www.uneval.org/document/download/2148>

⁹ <http://www.uneval.org/document/guidance-documents>

¹⁰ <https://intranetportal/Pages/ControlNo.aspx?controlNo=MA/GCU/00001>

¹¹ <https://intranetportal/Pages/ControlNo.aspx?controlNo=MA/GCU/00002>

- ✓ How is gender analysis reflected in evaluation **findings, conclusions and recommendations**?

For conducting evaluations:

1. Project document (technical proposal) contains gender analysis (gender-sensitive needs assessment) conducted during project preparation.	<ul style="list-style-type: none"> ✓ How are gender dimensions considered in the project document? ✓ Describe the gender analysis conducted during project preparation.
2. Project document incorporates gender-responsive project results framework, logframe, (i.e. gender-responsive output, outcome, indicator, budget, etc.)	<ul style="list-style-type: none"> ✓ In what ways is the project results framework (logframe) gender-responsive?
3. Share of women and men as direct beneficiaries of project.	<ul style="list-style-type: none"> ✓ What was the share of women and men as direct beneficiaries of project?
4. Project deliverables and achievements incorporate gender equality issues and enable assessment of results/progress.	<ul style="list-style-type: none"> ✓ Do project reports (i.e. inception, interim, final progress reports, and similar) incorporate gender dimensions, progress and results? ✓ Describe how differences, needs, roles and priorities of women, men and other relevant groups are considered. ✓ Have findings, conclusions and recommendations reflected gender analysis in project reporting?

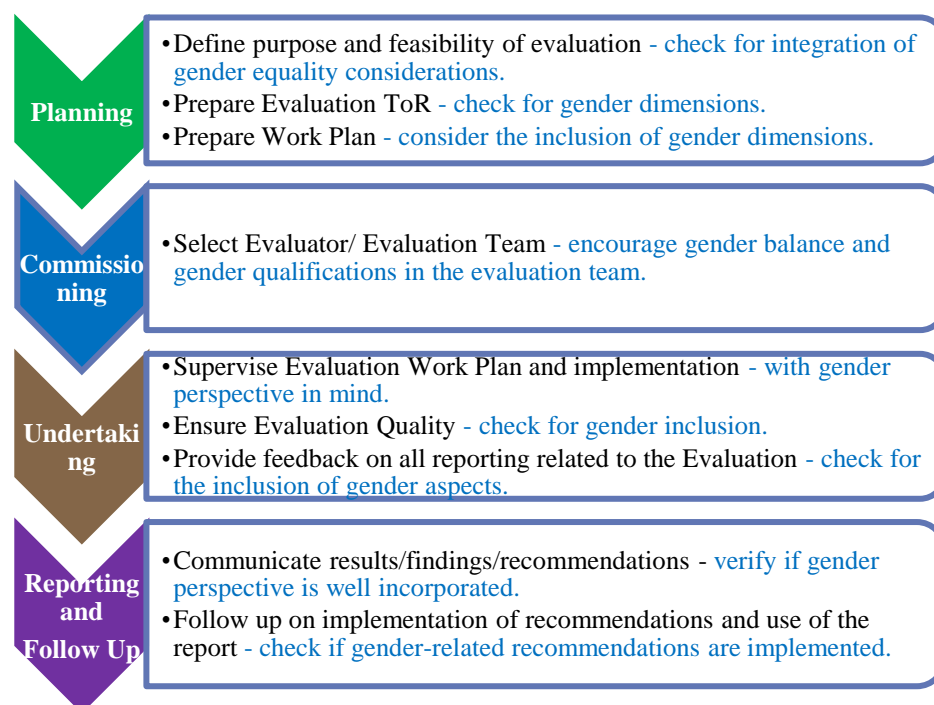
3. Gender Dimension in Evaluative Work

To integrate gender equality considerations into evaluative work, the Guidance introduces ways of integrating UN-SWAP criteria through a four-step approach, where Step 1 refers to the processes of both managing and conducting an evaluation and Steps 2 to 4 to the process of conducting the evaluation. Step 1 can also be used in cases when internal evaluations are conducted, where evaluation managers draft the ToR and internal evaluators conduct the evaluation and produce the evaluation report:

- ✓ **Step 1:** Integration of gender considerations in evaluation Terms of Reference (ToR), indicators and evaluation supervision;
- ✓ **Step 2:** Addressing gender in evaluation criteria and evaluation questions;
- ✓ **Step 3:** Making evaluation methodology and data collection and analysis methods gender-responsive; and

- ✓ **Step 4:** Reflecting gender analysis in evaluation findings, conclusions and recommendations.

IOM Project Handbook Module 6 on Evaluation lists the following phases during the process of managing the evaluation, that can be easily linked to the steps above:



Step 1: Integration of Gender in Evaluation ToRs

A first step to integrating gender equality considerations is their integration in evaluation ToR or the scope of analysis. The following should be addressed:

- ✓ Describe how gender issues will be tackled and analysed by the evaluation assignment. It is good to include a paragraph on gender in the **cross-cutting issues** or evaluation background, but gender aspects can also be included in any other key sections of the ToR based on need (objectives for the evaluation or evaluation methodology for instance).
- ✓ The ToR in the methodology section can describe how the evaluative work will tackle gender equality issues, focusing for instance on ensuring **equal access** to services and opportunities for all persons including men, women, boys and girls of all ages, inclusive of those who might identify as Lesbian, Gay, Bisexual, Transgender and/or Intersex (LGBTI), as opposed to only focusing on women and girls.
- ✓ A reference to gender in the **evaluation's objective** could also be provided, in case the intervention under evaluation encompasses relevant gender issues. Considering gender issues at the ToR planning stage will support the evaluation to subsequently assess the

gender-based results, i.e. *the provision of additional income generating opportunities for local rural population have created additional job opportunities for women*. One example is a ToR for the *Midterm Evaluation of IOM Gender Equality Policy 2015-2019*, which included an objective for the evaluation: “*to evaluate the overall performance and achievements of IOM in mainstreaming gender in its programme activities, including an assessment of the mid-term outcome of IOM’s Gender Policy on migration management*”.

- ✓ Opportunities and challenges (**main constraints**) to greater inclusion of gender issues could also be mentioned in the ToR, to enable the assessment of how the project contributed to promoting gender equality. It is recommended to use gender analysis to determine the basis for figuring out how IOM can make contributions to overcoming the identified constraints and develop gender-sensitive results statements and indicators which explain how this will be done. The ToR can suggest **areas** to be observed to evaluate assumptions and risks of the intervention so that possible negative side-effects for gender equality can be avoided.

Under the section of evaluation objective, some general **evaluation questions** should be designed in a way to ensure gender-related data will be analysed and used for the evaluation purposes to determine the gender dimensions. **Indicators** that are gender-sensitive are critical to gender-responsive evaluation work¹² as such indicators describe how the intended results are measured and help evaluators assess, for example, *whether the intervention has been successful in promoting gender equality at legal, political, economic and social levels*. Ideally, an intervention should have a set of quantitative and qualitative indicators from the beginning of its implementation, with information regularly collected through monitoring processes to compare the progress on the indicators with baseline information (the situation at project’s beginning).

However, the reality is that, very often, even if interventions have a set of indicators, it may be that they are not of good quality, are not measured frequently enough, or do not address gender equality issues at all. An **evaluability assessment** will help the evaluation manager identify whether the intervention has an adequate set of indicators (and information on their progress) to support the assessment of gender equality during the evaluation process. If the existing indicators are not sufficient to allow for an accurate assessment, specific indicators could be created during the evaluation planning stage (preparing and revising the ToR) and assessed during the evaluation process. Below are listed the main types of indicators addressing gender; mixed indicators (including quantitative and qualitative indicators) are always preferred:

Types of Gender Indicators	Examples
✓ Gender-differentiated indicator monitors changes among women and men, and/or any other key groups, as	<i>Per cent increase in income, separately documented for men and women; or per cent increase in</i>

¹² UN Women, A Manager’s Guide to Gender Equality and Human Rights Responsive Evaluation, source: www.unwomen.org/en/digital-library/publications/2010/1/a-manager-s-guide-to-gender-equality-and-humanrights-responsive-evaluation

an intervention is meant to occur among women and men and/or other key groups.	<i>manager positions held by women compared to men in government migration agencies</i>
✓ Gender-specific indicator only measures the intended change among one gender group.	<i>Per cent rise in production as a result of training offered specifically for women's groups working in agriculture.</i>
✓ Gender-neutral indicator monitors the change, for which the gender group for whom the change is observed is irrelevant	<i>All migration advisors acquire solid knowledge about the importance of gender equality and the prevention of GBV.</i>

To facilitate the cross-check of the integration of gender in evaluation ToRs, the UNEG Quality Checklist for Evaluation ToR and Inception Report¹³ can be used, as well as UN Women Evaluation Handbook on how to Manage Gender-responsive Evaluation, page 47, with the following questions summarizing what is recommended to be asked:

Integrating Gender in Evaluation ToRs	References
<ul style="list-style-type: none"> ✓ Does the ToR background cover the relevant gender issues? ✓ Are the main constraints to greater gender equality identified? ✓ Are gender issues incorporated in the evaluation objective and methodology? 	<p>UNEG Guidance Integrating Human Rights and Gender Equality in Evaluations (pp45-55)</p>
<ul style="list-style-type: none"> ✓ Are gender-sensitive indicators elaborated (in either results matrix or evaluation matrix) to assess gender-related changes in society over time? i.e. data disaggregated by sex and age (it should be clearly stated when such data is not available and why not). 	<p>UNEG Handbook on Integrating Human Rights and Gender Equality in Evaluation (pp33-35)</p>
<ul style="list-style-type: none"> ✓ Is the combination of quantitative* and qualitative indicators** used to provide more reliable information on results (it is recommended to go beyond sex and age-disaggregated data by using qualitative indicators, which will help point out changes in gender roles and relations or help bring out the often unheard voices, i.e. those of poor and marginalised women, adolescents, the elderly, those identifying as LGBTI and other key groups)? 	

¹³ <http://www.uneval.org/document/detail/608>

*Examples of gender-sensitive quantitative indicators: (i) *number of women and men registered for movement within first 6 months of project implementation*; and (ii) *at least x% of women and men visiting the information centre after being exposed to information materials advertising the centre*.

**Examples of gender-sensitive qualitative indicators: (i) *improved opinions regarding changes in social relations, behaviour or status, i.e. community leaders confirming the sharing of responsibility and transparent discussion between men and women is the main condition for decision making process*; and (ii) *improved provision of services regarding GBV for women and men*.

More examples of gender-sensitive indicators can be found in the Gender and RBM Guidance and Tip Sheet.

Resources to be used under the evaluation need to be gender-sensitive, meaning a gender perspective needs to be integrated in the responsibilities of the evaluation team, and gender expertise and experience should be included in qualifications. Details on commissioning the evaluation team are available in the IOM Project Handbook Module 6 on Evaluation, page 423, with the ToR template provided on page 456 and the template for call for applications for consultancy services for project evaluations available on page 476. Additional details on the selection of evaluation team can be found in UN Women Evaluation Handbook, page 58.

Supervision over the process of conducting an evaluation is extremely important and needs to be consistently and frequently conducted by the evaluation manager to ensure timely implementation of the evaluation and quality of the evaluation. Frequent communications with the evaluation team and follow up on draft and final evaluation outputs are essential to ensure evaluation findings and recommendations are relevant and implemented by the concerned parties. The evaluation manager assures the quality of the final report and ensures that the recommendations are clear, actionable and prioritized, specifically on gender equality issues.

Step 2: Addressing Gender in Evaluation Criteria and Questions

Once the scope of analysis for the evaluation contains gender references, a second step is to ensure that a gender perspective is integrated into evaluation criteria and questions as appropriate. Evaluation criteria and evaluation questions need to specifically tackle how gender dimensions have been integrated into design, planning, implementation and monitoring of the intervention and the results achieved, cross-checking the gender equality references under the OECD DAC¹⁴ criteria of design relevance, efficiency, effectiveness, impact and sustainability.

Gender-related DAC criteria and questions should clearly tackle constraints related to working with partners or accessing resources specific to gender, i.e. *not supporting women with livelihood opportunities due to age limit criteria of up to 40 years old*. Opportunities to creating

¹⁴ The Organisation for Economic Co-operation and Development's (OECD) Development Assistance Committee (DAC) defines evaluation as an assessment "to determine the relevance and fulfilment of objectives, developmental efficiency, effectiveness, impact and sustainability" of efforts supported by aid agencies: <http://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

greater gender sensitivity should also be identified and examples provided in case IOM's outcomes contributed to changing gender relations and norms.

Irrespective of the sector, financial mechanism or focal area, there are some basic evaluative questions that can form the starting point for evaluating gender:

Gender was considered by the project:	Gender was NOT considered by the project:
<ul style="list-style-type: none"> ✓ To what extent was gender reported on? ✓ What were the benefits and opportunities of taking gender into consideration? ✓ What were the gender equality objectives achieved (or likely to be achieved) and mainstreaming principles adhered to by the project? 	<ul style="list-style-type: none"> ✓ To what extent was the exclusion of gender a missed opportunity?

For general projects (projects not focusing on gender specifically), the “gender-inclusive” terms such as men, women and other key groups, should be integrated in the evaluation criteria and questions, and terms such as “**including women**” should be avoided to the extent possible as terms like this could be discriminatory and not supporting gender equality. A selection of guiding questions for consideration include:

Evaluation (DAC) Criteria	Examples of Evaluation Questions
Relevance	<ul style="list-style-type: none"> ✓ Has the project been planned based on a gender analysis (gender-sensitive needs assessment)? Does the project ToR contain clear gender mainstreaming aspects? ✓ Were gender equality principles used (e.g. equality, participation, social transformation, inclusiveness, empowerment, etc.) in the design and planning of the intervention and the results achieved? ✓ To what extent was the project aligned with the needs and priorities of men, women and other key groups? ✓ Was gender integrated into programmatic goals and objectives (direct project outputs, short- to medium-term outcomes as well as longer term impacts envisaged)? ✓ Do the intervention results respond to the needs of all stakeholders, men, women and other key groups, as identified at the design stage? ✓ How have different needs and priorities of men, women and other key groups been tackled in reaching IOM's global migration mandate? ✓ To what extent have gender considerations been integrated into the design, planning and implementation of the project and the results achieved? ✓ Have the assumptions and potential risks about gender roles, norms and relations been included in the project? And how will these factors affect the sustainability of the results?

	<ul style="list-style-type: none"> ✓ To what extent was the non-reference to gender issues a missed opportunity?
Effectiveness	<ul style="list-style-type: none"> ✓ Was a gender-responsive results framework (logframe) incorporated into the project design and was implementation consistent with the objectives? Were gender-responsive indicators appropriate for the given context? ✓ Were gender-disaggregated targets set and were gender-disaggregated indicators used? ✓ Was the benchmark survey or baseline study gender-sensitive? ✓ To what extent are indicators, outputs, outcomes and objectives gender-sensitive to ensure that gender-related data will be collected and contribute to performance? ✓ Which gender equality principles were used (e.g. equality, participation, social transformation, inclusiveness, empowerment, etc.) in the implementation of the intervention and the results achieved? ✓ Was gender mainstreaming an explicit requirement in all job descriptions, job responsibilities, and terms of reference for the project implementation, studies, consulting work, and training? ✓ To what extent was a gender perspective reported on?
Efficiency	<ul style="list-style-type: none"> ✓ Were gender dimensions integrated into the budget planning, budget reporting, and activities implementation? ✓ Was a gender perspective reflected in the delivery of outputs?
Impact	<ul style="list-style-type: none"> ✓ What were the gender equality objectives achieved (or likely to be contributed to) and mainstreaming principles adhered to by the intervention? ✓ To what extent has the inclusion of gender issues led to better quality results? (outcome and impact)? ✓ Were the results achieved equitably distributed among the targeted stakeholder groups? ✓ To what extent will/could a gender-sensitive approach lead to an improved impact of the project? ✓ What were the benefits and opportunities of taking gender into consideration? ✓ What were the gender equality objectives achieved (or likely to be achieved) and mainstreaming principles adhered to by the intervention?
Sustainability	<ul style="list-style-type: none"> ✓ Do the intervention results still respond to the needs of all stakeholders, men, women and other key groups, as previously identified at the design stage? ✓ Is the level of stakeholder ownership sufficiently gender-sensitive or gender-specific to allow for project outcomes/benefits to be sustained? ✓ What is the likeliness of increased gender equality beyond project end? ✓ What are the assumptions about gender roles, norms and relations that supported or hindered the project? And how will these factors affect the sustainability of the results?

Step 3: Making Evaluation Methodology and Data Collection and Analysis Methods Gender-Responsive

Gender needs to be incorporated in the methodology for the evaluation, i.e. qualitative and quantitative analysis and methods, such as mixed focus groups or equal numbers of male and female interviewees, and the type of evaluation to be carried out¹⁵. Evaluation methodologies need to encompass focus on **gender, not just women**. Gender equality means that everyone has equal rights, responsibilities and opportunities, regardless of sex or gender. It implies that the interests, needs and priorities of all are taken into consideration, recognising the diversity and heterogeneity of different groups of women, men and other key groups.

The evaluation methodology needs to be flexible, taking into account that it has to be adapted to the intervention and country contexts. This is particularly true of gender-focused evaluations, since sensitive issues might be tackled and evaluations carried out in highly politicized or insecure contexts. Evaluators need to adapt their methods to the risks of the persons involved – directly or indirectly – in the intervention and/or in the assessment process, as well as their own risks. These risks could be political, social or security in nature, i.e. *the threat for a regime opponent to be seen talking with foreigners or the danger that in certain circumstances a woman may face in travelling to meet with the evaluators*. A good knowledge of the social, historical and political context and constraints is needed.

Gender-focused evaluations benefit from the inclusion of an external **gender specialist** to assist in the development of the evaluation methodologies, the implementation of the evaluation (desk review and field visit phases) as well as the reporting of evaluative findings.

To assess **gender relevance**, different UN agencies make use of different gender screening or gender marker systems. IOM is developing the IOM Gender Marker to explore how IOM projects are mainstreaming gender into the development or project proposal stage. The Gender Marker criteria include: gender analysis provided in the needs assessments, gender-sensitive outputs, and gender considerations included in project activities. Based on the experiences and lessons learned from the pilot phase, the Gender Marker may be incorporated and streamlined into other aspects of the project cycle, i.e. implementation, monitoring, evaluation and reporting.

Data collection methods¹⁶ can be qualitative and quantitative, or a mixture of both, and include desk reviews, focus groups, interviews, surveys, etc. with accompanying tools such as questionnaires, observational tools, interview guides etc. developed integrating gender equality

¹⁵ Details on types and designs for the evaluations are available in UNEG Handbook, pg34 and UN Women Evaluation Handbook, p. 32 and p. 52.

¹⁶ Further guidance on “gender equality responsive evaluations” can be found in the UNEG Guidance Document on Integrating Human Rights and Gender Equality in Evaluation. One chapter is dedicated to data collection, analysis, interpretation, validation and reporting.

considerations (e.g. interview guides ensure that women and men are interviewed in ways that avoid gender biases or the reinforcement of gender discrimination and unequal power relations, etc.). During data screening and data analysis, special attention is paid to data and information that specifically refer to gender equality issues in the intervention, and making the best possible use of these in the overall assessment of the intervention.

Basic questions to ask when approaching data collection and data analysis	References
<ul style="list-style-type: none"> ✓ Are the identified sources of data and information reliable, and do they provide the necessary information? If not, are there alternative sources? Are the collected baseline data sex-disaggregated wherever possible? 	<p>UNEG Guidance Integrating Human Rights and Gender Equality in Evaluations (pp91-110)</p>
<ul style="list-style-type: none"> ✓ During data collection, are the persons being interviewed or surveyed gender-diverse and representative of all concerned project partners and beneficiaries? Have specific gender considerations been included during the data collection process, for example by surveying men and women in separate groups, depending on the respective cultural context? 	<p>UNEG Handbook on Integrating Human Rights and Gender Equality in Evaluation (pp37-41)</p>
<ul style="list-style-type: none"> ✓ Do surveys, interview questions, and other data collection instruments include gender considerations? 	
<ul style="list-style-type: none"> ✓ Were gender-sensitive data analysis methods, and specific groups targeted during interviews or focus groups to ensure that all voices are heard? 	
<ul style="list-style-type: none"> ✓ How is the male/female/LGBTI perspective taken into account when assessing the data? Does the gender analysis provide direction as to how this can be done? When the steering group is established, is gender competence within the team ensured and are there minimum numbers of men or women in the team? 	
<ul style="list-style-type: none"> ✓ What progress can be seen regarding the achievement of gender results or of the corresponding indicators? Have there been any (unforeseen) developments, and does additional action need to be taken regarding the associated assumptions and risks? 	

Document (desk) review enables considering the paper trail of an intervention. Taking gender considerations into account during data analysis and interpretation should go beyond simple counts of participants or tallying mentions of ‘gender,’ ‘women,’ ‘female,’ etc. Project managers should always be asked whether a gender assessment has taken place and to share the details of such analysis. Other questions could also be:

Examples of questions to ask oneself while conducting desk review and interviews	References
<ul style="list-style-type: none"> ✓ Have gender-related goals, needs and priorities been identified and realised? Was a gender analysis conducted during project preparation? What is the number/percentage of project reports that incorporated gender issues, progress and results? 	<p>UNEG Guidance Integrating Human Rights and Gender Equality in Evaluations (pp91-110)</p>
<ul style="list-style-type: none"> ✓ What have been key enabling factors and deterrents from reaching gender-related objectives and/or mainstreaming related principles into the intervention? The evaluation report should indicate the extent to which gender issues and considerations were incorporated where applicable. 	<p>UNEG Handbook on Integrating Human Rights and Gender Equality in Evaluation (pp37-41)</p>
<ul style="list-style-type: none"> ✓ Was the institutional capacity of the implementing and partner agent(s) reviewed for integrating gender into development activities? Did capacity development take place in order to address knowledge gaps on gender issues? Were progress and outcome of these activities monitored, evaluated and reported upon? 	

Selection of Key Evaluation Stakeholders is an integral part of the evaluation’s field research element, for example to select interviewees, the target groups for surveys, or the development of focus groups, reference groups or peer review groups. Stakeholder mapping and stakeholder analysis should consider the following aspects:

- ✓ The extent to which different activities, capacities, access to resources, roles, needs and priorities were taken into account for women, men and other key groups.
- ✓ If gender-sensitive social analysis or assessment took place.

Gender-sensitive identification and selection of key evaluation stakeholders should consider the following points:

Actions	Example questions
<ul style="list-style-type: none"> ✓ Identify and select key female, male and LGBTI stakeholders, or from other key groups, as relevant, and include their interests, positive or negative, in the project. Brainstorm on all possible stakeholders using the questions on the right as a guide, talking with various stakeholders and asking them who they would see as potential key evaluation stakeholders. The list of stakeholders may grow or shrink as the analysis progresses. 	<ul style="list-style-type: none"> ✓ Who has been involved? Who was most dependent? Who has had an economic stake? Who has been neglected by the project and for what reasons?

- ✓ Marginalized key evaluation stakeholders may lack the recognition or capacity to participate on an equal basis, and particular effort must be made to ensure and enable their participation. Keep in mind the literacy levels, language skills, and time and logistical constraints of key evaluation stakeholders identified, especially of marginalized stakeholders.
- ✓ It may not be possible to have all identified stakeholders involved; Use an inclusive and transparent approach in the identification and selection of key evaluation stakeholders, informing key stakeholders about the process and reasons for their inclusion, or exclusion from actual engagement.
- ✓ Who was most marginalised and for what reasons? Who can improve their participation apart from project? Who can receive additional support?
- ✓ Were all relevant stakeholders involved? Who is missing? Who is the most and who is the least active, and for what reasons? If anybody is missing, what are the reasons?

Interviews/Focus Group Discussions/Consultation Workshops/Surveys are an integral part of the stakeholder consultations with all key groups, including women’s groups, LGBTI groups and with those directly or indirectly benefitting from an intervention as beneficiary as well as implementer, user and community member. When developing and administering **interviews, focus group discussions, surveys**, refer to questions under Step 2 as well as UNEG Guidance Integrating Human Rights and Gender Equality in Evaluations, page 92.

Triangulation of data ensures reliability of information. By triangulating various methods, the voices of women, men, boys, girls, LGBTI, and other key groups are heard and used. Additional resources (time, staff, funds) to implement a gender-responsive approach need to be considered and planned for, and mixed-method approaches are preferred to make visible diverse perspectives. The UNEG Ethical Guidelines¹⁷ should be applied to the selection of data collection methods throughout the evaluation process, to ensure the inclusion of individuals and groups who are marginalized and/or discriminated against and that the evaluation adhere to the obligations to participants: respect for dignity and diversity; right to self-determination; fair representation; compliance with codes for vulnerable groups (i.e. ethics of research involving young children or vulnerable groups); confidentiality; and avoidance of harm.

Step 4: Reflecting Gender Analysis in Evaluation Findings, Conclusions and Recommendations

A final step involves the inclusion of gender analysis in the evaluation report. Throughout the entire evaluation exercise, data analysis will inevitably occur either during document review or interaction with stakeholders, and ‘iterative’ process of data analysis is advisable, particularly gender analysis, to show, for example, where data is missing, what the most interesting questions are, or what further data might be needed that better reflects the gender equality perspective.

¹⁷ <http://www.unevaluation.org/document/detail/102>

Once the data is analysed, the evaluator will need to interpret the findings, moving to more detailed questions on finding causal links and making inferences. Taking a gender equality approach, data should be interpreted if possible through multiple lenses, including for example sex and/or gender, age, socioeconomic status, sexual orientation, ethnicity and disability. Groups most likely to have their rights violated are often subject to multiple forms of discrimination, and it is important to understand how these different forms intersect to deny rights holders their rights. Cultural sensitivity is needed in data management as in all other elements of evaluation practice.

The UNEG standards provide guidance on integrating gender equality considerations into the drafting of the evaluation report¹⁸, which should generally indicate the extent to which gender issues and relevant human rights considerations were incorporated. Per UNEG's Guidance, a specific section on gender equality should be included at the end of the report. It is also recommended for gender-focused evaluations to highlight the implications for gender equality under each section of the evaluation report, as described in Table 16, Content and Standards for Evaluation Report, UNEG Guidance, pp112-114.

In case of **general evaluation reports**, which do not have a specific focus on gender, gender-related findings will be reported in the cross-cutting section. Reports should also comment on the achievement of indicators under intervention, and whether they include gender dimensions and if additional indicators have been identified in the course of the intervention specifically addressing gender issues (mixed indicators, both quantitative and qualitative are preferred). In case sex-disaggregated indicators are not available, the evaluation report should still be able to assess how the programme may have affected men, women, girls, boys and other key groups.

In cases of **gender-focused** evaluations, the report will elaborate on how gender objectives and gender mainstreaming principles were included in the intervention design, and how gender results and corresponding indicators have been achieved, i.e. which results have been achieved for women, for men and for other key groups (examples of gender results and indicators provided under Step 1). The evaluation report will assess if IOM achieved results and if IOM has been responsible or only contributed to the achievement, or even missed the opportunity to contribute, per evaluation questions established in the ToR. Gender-focused evaluation requires an assessment of the extent to which an intervention being evaluated has been guided by organisational and system-wide objectives on gender.

Similarly, the gender-focused report should comment on how the identified benefits or constraints to the inclusion of gender considerations have been dealt with and what changes have occurred. When reporting on the composition of the project team, steering and working groups, the findings should reflect gender-related competence of the teams/groups as well as the team/group's gender composition, i.e. what were the numbers of women and men in the various team and group compositions. The unforeseen developments and additional actions

¹⁸ <http://www.uneval.org/document/detail/22>

that need to be taken regarding the associated risks and assumptions materializing in the course of the intervention should also be presented, covering gender dimensions where relevant.

To be able to evaluate whether and how the measures promoted by IOM affect the different life situations of women, men and other relevant groups, the scope of gender analysis from the ToR needs to open the possibility to document the current situation (possibly using data from individual baseline surveys). The aim of a gender approach to analysis is to analyse gender relations, identify different needs and existing discrimination, and suggest specific measures to strengthen the rights of a disadvantaged gender or eliminate gender discrimination.

The evaluation report shall also highlight lessons, challenges and recommendations identified from a gender perspective, by focusing on the relations between genders, i.e. women, men and other key groups, rather than focusing on women and girls only, including in cases where the project targets women and girls specifically. The related findings could also cover relations between genders and if they have been affected or improved and if such relations ultimately led to gender equality.

When the tentative findings are prepared, it is good practice to **validate** these findings through workshops with different stakeholders, to increase the accuracy, **reliability** and the sense of ownership of the data and evaluation process with all stakeholders. Evaluators and evaluation managers play important roles in the process of defining if the response (from the discussion of evaluation findings, report distribution to the determination of implementation strategies) is in accordance with the principles of inclusiveness and participation, accountability, transparency, non-discrimination and empowerment.

UNEG has identified three preconditions to aid effective evaluation management response and follow-up process to incorporate gender equality principles: (i) **The involvement of internal and external stakeholders**, will ensure the effective use of the evaluation, the sense of ownership and commitment by primary users to implement the recommendations (with particular attention to inclusion of women and individuals/groups who are marginalized and/or discriminated against); (ii) **Quality evaluation recommendations**, clearly formulated and accessible to a variety of target audiences, will ensure effective dissemination and implementation (consideration of gender equality dimension may require an adaptation of the language and style); and (iii) **Evaluation credibility**, involving independence, impartiality, transparency, quality and the appropriateness of the methods used (especially when tackling sensitive political and social issues typically involved in gender equality work), will strengthen buy-in of the evaluation and its findings through validation and participatory dissemination with key stakeholder groups to further raise the credibility of the evaluation.

**Checking for inclusion of gender in
evaluation reports**

Additional considerations

<ul style="list-style-type: none"> ✓ Does the evaluation report reflect a gender perspective? ✓ Does evaluation report include the analysis of sex-disaggregated data? i.e. are/were male, female and other key beneficiaries able to participate meaningfully in the project; why or why not? ✓ Were there any barriers to meaningful participation and what has been or will be done to address these barriers? ✓ Are/were the needs and skills of all key groups adequately addressed and incorporated? Are/were all key groups satisfied with the project's activities? ✓ Is gender considered in discussion of successes and challenges, actions taken, lessons learned, and best practices? <ul style="list-style-type: none"> ✓ Is gender considered in the recommendations? 	<ul style="list-style-type: none"> ✓ Does the project strategy need to be adjusted to achieve the objectives and results related to gender equality? ✓ What information can be provided to the donor that could be useful for their own gender strategic development and programme steering? i.e. accountability to gender, proof of gender-results attainment, gender-reporting commitments. ✓ Are the project's experiences in promoting gender equality and strengthening the rights of relevant key groups being prepared for dissemination to improve knowledge management and learning? ✓ Should any experiences and/or good practices be used for IOM's institutional learning on gender (see 2015 Gender Equality Policy)?
<p>UNEG Guidance Integrating Human Rights and Gender Equality in Evaluations (p110-114); UNEG Handbook on Integrating Human Rights and Gender Equality in Evaluation (p42).</p>	

For more concrete examples and reading, UNEG suggests the WFP's evaluation of its *Ghana Country Programme 2006-2010*¹⁹ as a good example of attention to gender equality and the empowerment of women in the evaluation report. The report covers for instance:

- ✓ A gender-balanced team;
- ✓ Systematically disaggregated data by sex and carries out an analysis of the sex-disaggregated data;
- ✓ An outline of the gender equality and empowerment of women objectives of the programme and assesses the results of these objectives in detail;
- ✓ Detailed analysis of the gender equality and empowerment of women results in the evaluation conclusions; and
- ✓ Provides one gender-related recommendation.

Additionally, IOM's mid-term Evaluation of the IOM Gender Equality Policy 2015-2019²⁰ could be used as an additional reference for a gender-specific evaluation.

¹⁹ <http://one.wfp.org/eb/docs/2010/wfp219010~1.pdf>

²⁰ Source: please contact OIG/Evaluation to obtain the document.

Annex 1: Useful References

IOM, *Gender Equality Policy 2015-2019*, 2015, source:
<https://www.iom.int/sites/default/files/about-iom/gender/C-106-INF-8-Rev.1-IOM-Gender-Equality-Policy-2015-2019.pdf>

IOM, *Gender and RBM Guidance*, 2017, source:
<https://intranetportal/Pages/ControlNo.aspx?controlNo=MA/GCU/00001> (full guidance)
<https://intranetportal/Pages/ControlNo.aspx?controlNo=MA/GCU/00002> (tip sheet)

IOM, *Project Handbook/Module 6 on Evaluation*, 2017, source:
<https://intranetportal/Pages/ControlNo.aspx?controlNo=IN/00250/Module6> (gender mainstreaming guiding questions on page 481)

UNEG, *Handbook, Guidance and Technical Note*, 2014, source:
<http://www.uneval.org/document/guidance-documents> and
<http://www.uneval.org/document/download/2148>

UNEG, *Ethical Guidelines*, 2008, source:
<http://www.unevaluation.org/document/download/548>

UNEG, *Quality Checklist for Evaluation ToR and Inception Report*, 2014, source:
<http://www.uneval.org/document/detail/608>

UNEG, *Guidance on Evaluating Gender Mainstreaming*, 2018, source:
<http://www.uneval.org/document/guidance-documents>

UN, *UN-SWAP Evaluation Performance Indicator Technical Note and UN-SWAP indicators*, 2018, source:
<http://www.unsystem.org/content/un-system-wide-action-plan-gender-equality-and-empowerment-women-swap>

UN WOMEN, *Evaluation Handbook: How to Manage Gender-responsive Evaluation*, 2015:
<http://www.unwomen.org/en/digital-library/publications/2015/4/un-women-evaluation-handbook-how-to-manage-gender-responsive-evaluation>

UN Women, *A Manager's Guide to Gender Equality and Human Rights Responsive Evaluation*, 2010, source:
<http://www.unwomen.org/en/digital-library/publications/2010/1/a-manager-s-guide-to-gender-equality-and-humanrights-responsive-evaluation>

Annex 2: Glossary of Terms

Definitions were obtained and adapted from the 2015 IOM Gender Equality Policy, UNEG and UN Women Handbook and Guidance.

Gender refers to the socially constructed roles and relationships, personality traits, attitudes, behaviors, values, relative power and influence that society ascribes to males and females, inclusive of transgender and intersex persons, on a differential basis. Gender is relational and refers not simply to women, men or other key groups, but to the relationship between them²¹. Although notions of gender are deeply rooted in every culture, they are also changeable over time and have wide variations both within and between cultures.

Gender analysis is an assessment of the roles of, and relations between, women and men, girls and boys, inclusive of transgender and intersex persons. It recognizes that all individuals' lives, and therefore experiences, needs, issues and priorities, are different. A gender analysis should be integrated into all sector assessments and situational analyses, starting with the conceptualization phase.

Gender balance in staffing refers to ensuring equal representation of male and female staff members at all levels in an organisation. It is also known as gender parity in staffing.

Gender equality refers to the equal rights, responsibilities and opportunities of all individuals, regardless of sex or gender. Equality means that rights, responsibilities and opportunities will not depend on one's sex or gender. Gender equality does not imply that all individuals are the same, but rather that the interests, needs, capacities and priorities of all are taken into consideration. Gender equality is not a women's issue but should concern and fully engage men and other key groups as well as women. Gender equality is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centered development.

Gender mainstreaming refers to the process of assessing the gendered implications for all individuals of any planned action, including policies, programming or legislation, in any area and at all levels. It is a strategy for making the concerns and experiences of women, men, boys and girls, inclusive of transgender and intersex persons, an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes so that everyone benefits equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality²².

Gender responsiveness in terms of approaches, methodologies, tools or data analysis techniques implies equality of treatment and prevention of gender bias or favoritism to a specific gender resulting in unfair treatment. Due to historical disadvantages, it often focuses on ensuring that the needs and experiences of women and girls are addressed.

²¹ UN-Women, Guidance Note: Gender Mainstreaming in Development Programming (2014).

²² United Nations, Report of the Economic and Social Council for 1997, chapter IV, agreed conclusions 1997/2 (A/52/3 of 18 September 1997).

Gender sensitivity refers to the aim of understanding and taking account of the societal and cultural factors involved in gender-based exclusion and discrimination in the most diverse spheres of public and private life. Due to historical inequalities, it often focuses on instances of structural disadvantage in the positions and roles of women.

Gender-specific indicates a specific focus on gender issues. Evaluations, interventions and activities that are gender-specific consider gender norms, roles and relations for women, men and other relevant groups, and how they affect access to and control over resources, and addresses these groups' specific needs. They often intentionally target and benefit a specific group to achieve certain policy or programme goals or meet certain needs.

Empowerment is a basic concept of human rights and development that refers to the process through which people individually and collectively become conscious of how power relations operate in their lives and gain the necessary confidence and strength to change inequalities and strengthen their economic, political and social position²³. The empowerment of women has five main components: (1) women's sense of self-worth; (2) right to have and determine choices; (3) right to have access to opportunities and resources; (4) right to have power to control own lives both within and outside the home; (5) ability to influence the direction of social change to create a more just social and economic order, nationally and internationally.

Sex-disaggregated data is data that is collected and presented separately on men, women and other relevant groups. Sex describes the biological and physiological differences that distinguish males, females and intersex persons.

²³ United Nations Millennium Project, Task Force on Education and Gender Equality, Taking Action: Achieving Gender Equality and Empowering Women (2005).

Annex 3: Overview of Core Gender Sensitive Indicators

Outcomes	Gender Indicators	Source of Verification
For managing evaluations		
Evaluation ToR fully integrates gender aspects.	<ol style="list-style-type: none"> 1. Evaluation ToR contains gender references in the scope of work. 2. The process of commissioning for the evaluation contains gender references. 3. Implementation and reporting under evaluation contain gender references and analysis. 	ToR at endorsement level, technical proposal for the evaluation, and evaluation outputs (Inception, Interim or Final Evaluation Reports).
For conducting evaluations		
Project design fully integrates gender aspects.	<ol style="list-style-type: none"> 1. Project Document contains gender analysis (gender-sensitive needs assessment) conducted during project preparation. 2. Project document incorporates gender responsive project results framework, logframe, (e.g. gender-responsive output, outcome, indicator, budget, etc.). 	Project Document at endorsement level.
Project implementation ensures gender-equitable participation in and benefit from project activities.	<ol style="list-style-type: none"> 3. Share of women and men as direct beneficiaries of project. 	Project Inception, Implementation and Mid-Term or Interim Reports, and Final Project Reports.
Project deliverables and outcomes give adequate attention to gender mainstreaming.	<ol style="list-style-type: none"> 4. Project deliverables and achievements incorporate gender equality issues and enable assessment of results/progress. 	Project inputs, outputs, results and outcomes, Inception, Interim, Final Progress Reports and similar.

Annex 4: Explanation of UN-SWAP Gender Equality and Empowerment of Women (GEEW²⁴) Evaluation and Scoring Criteria

Evaluation Criteria	Guiding Questions
<p>1. GEEW is integrated in the Evaluation Scope of Analysis and Evaluation Criteria and Questions are designed in a way that ensures GEEW-related data will be collected.</p>	<p>a. Does the evaluation assess whether sufficient information was collected during the implementation period on specific result indicators to measure progress on human rights and gender equality results?</p> <p>b. Does the evaluation include an objective specific to assessment of human rights and gender equality considerations or was it mainstreamed in other objectives?</p> <p>c. Was a standalone criterion on gender and/or human rights included in the evaluation framework or mainstreamed into other evaluation criteria?</p> <p>d. Is there a dedicated evaluation question or sub-question regarding how GEEW was integrated into the subject of the evaluation?</p> <p><i>Further guidance on integrating GEEW consideration into OECD-DAC criteria and evaluation questions is provided on p. 76-88 in the UNEG Guidance Integrating Human Rights and Gender Equality in Evaluation; p. 25-32 in the UNEG Handbook on Integrating Human Rights and Gender Equality in Evaluation.</i></p>
<p>2. A gender-responsive Evaluation Methodology, Methods and tools, and Data Analysis Techniques are selected.</p>	<p>a. Does the evaluation specify how gender issues are addressed in the methodology, including: how data collection and analysis methods integrate gender considerations and ensure data collected is disaggregated by sex?</p> <p>b. Does the evaluation methodology employ a mixed-methods approach, appropriate to evaluating GEEW considerations?</p> <p>c. Are a diverse range of data sources and processes employed (i.e. triangulation, validation) to guarantee inclusion, accuracy and credibility?</p> <p>d. Does the evaluation methods and sampling frame address the diversity of stakeholders affected by the intervention, particularly the most vulnerable, where appropriate?</p>
<p>3. The evaluation Findings, Conclusions and Recommendations reflect a gender analysis.</p>	<p>a. Does the evaluation have a background section that includes an intersectional analysis of the specific social groups affected by the issue or spell out the relevant normative instruments or policies related to human rights and gender equality?</p> <p>b. Do the findings include data analysis that explicitly and transparently triangulates the voices of different social role groups, and/or disaggregates quantitative data, where applicable?</p>

²⁴ While UNEG guidance addresses Gender Equality and Women’s Empowerment (GEEW) and refers to women, men, girls and boys, IOM guidance addresses gender equality more broadly and focuses on empowerment of all with the understanding that depending on the situation, groups other than women may also be particularly disadvantaged or disempowered and may need targeted assistance. IOM guidance also aims to be inclusive of persons who may not identify as either male or female.

c. Are unanticipated effects of the intervention on human rights and gender equality described?

d. Does the evaluation report provide specific recommendations addressing GEEW issues, and priorities for action to improve GEEW or the intervention or future initiatives in this area?

Further guidance on gender-responsive data analysis is provided on p. 110-114 in the UNEG Guidance Integrating Human Rights and Gender Equality in Evaluations p. 42 in the UNEG Handbook on Integrating Human Rights and Gender Equality in Evaluation.

4. Conducted at least **one Evaluation** to assess corporate performance on gender mainstreaming every 5-8 years.

To “exceed requirement” an entity's evaluation reports must “meet requirement” and that entity must also conduct an evaluation of its corporate gender policies. Otherwise, even though an entity conducted a corporate evaluation, its reports do not meet requirements, so its overall score cannot be in the “exceed requirement” category. The aggregate score of evaluations should therefore be at least be 6,5 points or above (meets requirement) AND there must be an evaluation of its corporate performance on gender mainstreaming every 5-8 years to obtain the “exceed requirement.”

UN entities use the Scorecard to assess each evaluation report using a four-point scale rating system for each criterion. Each of the scoring levels below corresponds to a numbered score:

Scoring Criteria

Annotation

0 = Not at all integrated.

Applies when none of the elements under a criterion are met.

1 = Partially integrated.

Applies when some minimal elements are met but further progress is needed and remedial action to meet the standard is required.

2 = Satisfactorily integrated.

Applies when a satisfactory level has been reached and many of the elements are met but still improvement could be done.

3 = Fully integrated.

Applies when all of the elements under a criterion are met, used and fully integrated in the evaluation and no remedial action is required.

It is important to note that no decimals should be provided in the scoring of criteria, only whole numbers. Since each evaluation report is assessed against 4 criteria, the maximum possible number of points that a report can obtain is 12 (by obtaining 3 points in each of the 4 criteria). To calculate the overall individual evaluation score, the total number of points for each criterion will be added up and the overall evaluation rating will be given using the scoring system below:

0-3 points

Misses requirement

4-6 points

Approaches requirement

7-9 points

Meets requirement

Over 9 (9,01) to 12 points

Exceeds Requirements