



# Measuring gender-transformative change

A review of literature and promising practices

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# Executive summary

## What do we mean by gender-transformative change?

Gender-transformative approaches aim to move beyond individual self-improvement among women and toward transforming the power dynamics and structures that serve to reinforce gendered inequalities. As defined by the CGIAR Research Program on Aquatic Agricultural Systems (AAS), a gender-transformative approach to development goes beyond the “symptoms” of gender inequality to address “the social norms, attitudes, behaviors, and social systems that underlie them” (AAS 2012, 3). This approach entails engaging groups in critically examining, challenging and questioning gender norms and power relations (Rottach et al. 2009) that underlie visible gender gaps. Transformative change can be measured by examining three broad domains of empowerment:

- **agency:** individual and collective capacities (knowledge and skills), attitudes, critical reflection, assets, actions, and access to services
- **relations:** the expectations and cooperative or negotiation dynamics embedded within relationships between people in the home, market, community, and groups and organizations
- **structures:** the informal and formal institutional rules that govern collective, individual and institutional practices, such as environment, social norms, recognition and status (Martinez and Wu 2009; Morgan 2014).

Considering all three of these dimensions helps reframe the discourse of empowerment—and the burden of change—from a focus on women’s individual agency to collective responsibility and political engagement and action.

Kabeer (2005, 22) critiques the dominant development discourse (in the form of the Millennium Development Goals) for reducing the framing of the process of empowerment to a “series of technical goals to be implemented mainly by the very actors and institutions that have blocked their realisation in the past.” Others have echoed this concern, and specifically that mainstream gender approaches promote an instrumental view of empowerment, focusing on individual women as a force for catalyzing development outcomes and efficiencies. These approaches speak in terms of “unleashing the potential” of women as drivers of economic growth, as superior investors in savings, health and education, etc. (Razavi and Miller 1995; Cornwall 2014). This approach reflects neoliberal economic development models and avoids examination of how large-scale development policies may interact with existing power relations and social norms to hinder social justice and women’s autonomy (Chant and Sweetman 2012; Razavi 2012).

This mainstream framing edits out the political processes of grassroots mobilization of women and sidelines the feminist values of building women’s awareness and capacities to challenge patriarchal structures and relations on their own terms. Gender-transformative approaches to development, in contrast, hold a conceptualization of empowerment that embraces its feminist roots. Gender-transformative change and processes of empowerment are ultimately about transforming unequal power relations and the structures and norms (both visible and invisible) that uphold them. Within this framing, understanding and measuring changes in empowerment entails an examination of the multiple manifestations of power and how they interact to create unequal outcomes. In this paper, we refer to four dimensions of power. **Power over**—defined as control over people, resources and others’ lives—is the most commonly addressed form of power. **Power to** act and to realize one’s aspirations is directly related to the agency dimension of empowerment and is frequently measured in terms of individual skills, capacities and self-confidence. **Power within** refers to a person’s or group’s sense of self-worth, self-awareness, self-knowledge and aspirations, which are also related to agency and shaped by social norms and gendered institutions. **Power with** involves collaborative and collective power with others through mutual support, collaboration, recognition and respect for differences. This can take place at multiple levels, from household and intimate relationships to cooperatives and collectives, as well as broader-level coalitions and movements for change.

## Gender-transformative measurement, evaluation and learning systems

Gender-transformative change questions internalized belief systems and closely held identities, challenges entrenched institutionalized structures, and deals with everyday habits and relationships that may be caring as well as unequal. Such change is often emergent rather than linear; it is multidimensional and sensitive to diverse actors' experiences of change (Kantor and Apgar 2013). Chapter 2 describes how measuring such change is an inherently complex and holistic endeavor and explains that gender-transformative measurement systems must be equipped to embrace complexity and context-specificity, as well as the halting and often unpredictable nature of social change. Applying a feminist evaluation lens to gender-transformative measurement systems can provide epistemological guidelines for embracing complexity and capturing the critical intersections of gender, race, class and sexuality in the power dimensions of agency, relations and structures (Mertens 2005). Feminist evaluation is not prescriptive but rather offers a lens and framework for thinking about evaluation and unpacking the deeper systems and beliefs beneath surface-level differences in gender roles, relations and outcomes. It also acknowledges that the process of evaluation itself can reinforce or challenge power relations —there are different ways of knowing, and power relations and social norms may privilege the perspectives of certain actors over marginalized others (McRobbie 1982; Hirsch and Keller 1990; Beardsley and Hughes Miller 2002; Hughes 2002; Podems 2010). Thus, the systems used for monitoring, evaluating and learning about gender-transformative change are as important as the indicators themselves.

The literature on measuring gender-transformative change indicates that adopting gender-transformative approaches and measurement systems begins with critical examination of an institution's practices, which helps an institution to identify how its own research practices can contribute to (or are currently impeding) empowerment and broader social change processes. Creating structured spaces and processes for critically examining beliefs, attitudes and practices around gender among staff and partners enables gender-transformative approaches and measurement systems by helping research and development institutions identify their roles as key actors and power holders in the social systems they study (Batliwala and Pittman 2010; Derbyshire et al. 2015).

Robust and accurate theories of change help make explicit fundamental assumptions about why a program should work and help programs identify pertinent indicators. Applying a feminist lens, bringing in explicit gender expertise and diverse stakeholder views, and conducting social and gender analysis can ensure that such theories of change address underlying social structures, policies and broadly held social norms that perpetuate gender inequalities (Hirsch and Keller 1990; Beardsley and Hughes Miller 2002; Hughes 2002; McRobbie 1982 in Podems 2010).

Privileging qualitative and participatory techniques alongside quantitative indicators is a common feature of gender-transformative change measurement. Qualitative approaches can be used to develop quantitative indicators of change that are robust, contextually meaningful and comparable across diverse program regions (Bragin et al. 2014; CARE 2015). Research processes that privilege marginalized perspectives, validate different ways of knowing and promote critical examination of gender norms can themselves be transformative, contributing to social transformation and building the skills "to question, analyse, and act on the structures of patriarchal constraint in their lives" (Kabeer 2005, 15).

Recognizing that the kinds of changes that gender-transformative approaches aim for are ambitious, context-specific, typically take a long time and rarely progress in a linear fashion, a responsive monitoring, evaluation and learning system may also require a perspective shift in terms of what "success" looks like. The selection of gender-transformative measurement processes requires tools and approaches, such as progress markers and outcome mapping, that assess change as an incremental process instead of an endpoint and final product (Guijt 2008).

Finally, many monitoring, evaluation and learning systems are inadequate in tracking risk, negative change, backlash and unanticipated change. Given the unpredictable nature of social change, gender-transformative monitoring, evaluation and learning systems require robust tools and systematic processes for risk monitoring as well as gender expertise for interpreting the pushback that often accompanies progress in women's rights work (Batliwala and Pittman 2010). Participatory learning processes such as systematization unpack how different stakeholders experienced an initiative's evolution and help situate how strategies and adaptations interacted in real societies beyond what was envisioned in initial proposals and planning (Phartiyal 2006; Tapella and Rodriguez-Bilella 2014). Such approaches facilitate a more active response to emerging challenges and are a mechanism for ensuring researchers' accountability in the complex and critical endeavor of promoting more equitable and just smallholder systems.

## Indicators of gender-transformative change

Gender-equitable transformation grows more cooperative forms of power and relationships (power with) that affirm diverse people's critical awareness and dignity (power within) and their capabilities and aspirations (power to; Freire 1970; Hooks 2004; Miller et al. 2006). Chapter 3 of this report examines existing indicators of gender-transformative change in agriculture and aquaculture systems from the lens of these four critical dimensions of power, and across the domains of agency, relations and structures. While there are many rigorously tested indicators of the first two dimensions of power (capacities and access to resources) from the individual agency level, this framing elevates the focus from individual to systems-level change. The indicator review demonstrates that while there are fewer standardized indicators for the other dimensions of power, there is a wealth of promising processes and practices for measuring meaningful relational change, social norm change or change in the less tangible aspects of recognition. Examining indicators of power within and power with brings back into focus feminist theory and its understanding of gender equality as a political project, drawing renewed attention to the importance of consciousness-raising and women's collective action as indispensable ingredients of sustainable, meaningful social change (Cornwall 2014).



# Introduction

The development impacts of gender inequality are well documented. Where women generally have greater access to education, work and income, communities see positive household impacts in relation to health and mortality (Kabeer and Natali 2013). Societies characterized by the denial of women's rights (in terms of access to resources, decision-making, status and gender-based violence) also tend to be more prone to violent conflict (Schmeidl and Piza-Lopez 2002). Further, deep gender discrimination and gender-based violence are generally associated with lower labor productivity, poorer educational outcomes, lower child health and nutrition and higher child mortality rates, strains on social and health service systems, and poorer overall economic growth from household to community and national levels (Morrison and Orlando 2004; Kabeer and Natali 2013; Joint Irish Consortium on Gender Based Violence n.d.).

Studies have shown that greater gender equality supports greater and more sustainable development. However, the converse relationship—that economic development automatically promotes gender equality—does not hold true (Kabeer and Natali 2013). As such, measurement of development program processes and outcomes must pay particular attention to both how different genders are affected by development programming and how interventions are supporting women's rights and gender equality (UN Women 2013).

In the agriculture and aquaculture sectors, mainstream discourse acknowledges the importance of smallholder agriculture and aquaculture for economic growth and climate resilience, as well as the central importance of women smallholders to such development strategies. However, there is growing recognition that the decades of focus on rural women's *economic* empowerment have failed to bring about significant structural improvements in these critical livelihood sectors (Morgan 2014). Mainstream approaches to women's economic empowerment have been critiqued as technical fixes and a matter of filling gaps in access to resources that fail to acknowledge that social, political and market systems are not neutral, but structured in a way that reflect and reinforce the societal inequalities that shaped them (Razavi and Miller 1995; Kabeer 2005; Cornwall 2014). Without directly confronting and acknowledging the issues of power and social justice—that is, transforming the political, social and structural dimensions of gender inequality—gender injustice will continue to exacerbate poverty and hinder social development (Kabeer and Natali 2013; UN Women 2013; Cavalcanti and Tavares J. 2016).

Recognizing that the impact we hope for in development practice will not happen through business as usual, WorldFish and CARE are deliberately committed to bringing about more equitable social transformation through their gender-transformative approaches to agriculture research and development practice in agriculture and aquaculture (Morgan 2014). Through AAS and CARE's integrated agriculture platform, both organizations have and are actively pioneering, testing and sharing new frameworks and processes for promoting gender-transformative change and outcomes, with a focus on underlying social norms, gender relations in market systems and long-term societal change.

## Methodology

New ways of working require a broader understanding of the outcomes and impact we are seeking and new ways of measuring and learning from our work. This report broadly examines existing literature on frameworks and monitoring, evaluation and learning systems, as well as specific indicators and approaches for measuring gender-transformative change, particularly in the smallholder agriculture sector. The literature review was commissioned by AAS and is intended to inform WorldFish and CARE initiatives and monitoring and evaluation practices going forward. It was conducted over a period from October to December 2014 by a team of gender specialists from CARE USA, a development organization whose livelihoods approaches and empowerment frameworks share gender-transformative aims and approaches similar to those of AAS. The literature review began with an examination of the AAS monitoring, evaluation and learning system, its approach to gender-transformative programming, and its publications to date on gender-transformative change, including an internal review of the literature on gender-transformative approaches conducted as part of the program. The initial working definition of "gender-transformative approaches" was drawn from CARE and WorldFish institutional frameworks, which are similar in scope and approach and are aligned to feminist writings on empowerment and development, including the ongoing work of Naila Kabeer, Srilatha Batliwala and the research program Pathways of Women's Empowerment, established as a consortium of feminist research centers in Latin America, the Middle East, South Asia, West Africa and the United Kingdom. The authors scanned the existing literature to compile an initial document list of writings on gender-transformative measurement and indicators, using key word searches with



terms such as “gender-transformative,” “women’s empowerment,” “social norms” and “gender equity.” With an explicit focus on relevant experience within the aquatic agriculture and livelihoods sector, the literature review also collected published and unpublished program documents from CARE, AAS, and other organizations with gender-focused livelihoods and agriculture programs. The review of gender-transformative indicators and approaches draws liberally from these examples.

A Microsoft Excel matrix was used to organize these documents (a total of 60) into several categories:

- 1) feminist critiques of development, including conceptual writing on women’s empowerment and how the concept has evolved within the mainstream development industry;
- 2) guidance documents related to specific gender-transformative approaches to measuring change;
- 3) discussions and critiques of specific livelihoods indicators;
- 4) documents with multidimensional gender-transformative indices of poverty or empowerment, including the Wellbeing Index developed by the University of Bath, the Individual Deprivation Measure, the Organisation for Economic Co-operation and Development’s Social Institutions and Gender Index, and the Women’s Empowerment in Agriculture Index (WEAI).

The analysis followed an iterative process among the authors of summarizing the divergent and similar findings among the readings, selecting the pertinent indicators for the livelihoods and aquatic agriculture sector, and synthesizing the findings. The report is organized into three sections: a framework for understanding gender-transformative change; a discussion on the key features of gender-transformative measurement, evaluation and learning systems; and a critical evaluation of potentially gender-transformative indicators currently being used in the livelihoods sector. Throughout, the analysis focuses on two key aspects of social injustice—patriarchy and heteronormativity<sup>1</sup>—as the deep-rooted belief systems that underlie gender injustice and permeate the key structures and relations in the systems in question. This review highlights promising practices as well as existing gaps in gender-transformative measures and offers a set of recommendations for development practitioners and researchers on identifying leading indicators for gender transformation and how to integrate gender - transformative measures into programming.

<sup>1</sup>According to Wikipedia, “Heteronormativity is the belief that people fall into distinct and complementary genders (man and woman) with natural roles in life. It assumes that heterosexuality is the only sexual orientation or only norm, and states that sexual and marital relations are most (or only) fitting between people of opposite sexes. Consequently, a ‘heteronormative’ view is one that involves alignment of biological sex, sexuality, gender identity and gender roles. Heteronormativity is often linked to heterosexism and homophobia.[1]” Accessed 24 May 2016. <https://en.wikipedia.org/wiki/Heteronormativity>.

# Chapter 1: Measuring gender transformation

## 1.1 Framework for understanding gender transformation

The Interagency Gender Working Group (IGWG) says the following: “Gender-transformative approaches actively strive to examine, question, and change rigid gender norms and imbalance of power ... Gender-transformative approaches encourage critical awareness among men and women of gender roles and norms; promote the position of women; challenge the distribution of resources and allocation of duties between men and women; and/or address the power relationships between women and others in the community” (Rottach et al. 2009, 8). These approaches aim to go beyond individual self-improvement among women toward transforming power dynamics and structures that act to reinforce gendered inequalities.

### 1.1.1 Gender transformation, empowerment and social justice

Gender-transformative change, framed as moving toward gender equality, can be examined across three key dimensions (Martinez and Wu 2009; Morgan 2014):

- **agency:** individual or collective capacities (knowledge and skills), attitudes, critical reflection, assets, actions, and access to services;
- **relational (intrahousehold and beyond):** the expectations and cooperative or negotiation dynamics embedded within relationships between people in the home, market, community, and groups and organizations;
- **structural:** informal and formal institutional rules and practices (environment, norms, recognition and status).

These three domains offer a broad framework for understanding where transformation is needed to advance gender equality. Each is deeply interconnected with the others. Individuals’ aspirations and attitudes are largely influenced by the social norms and practices within their societies, as well as the quality of their relationships and support networks. Evidence has also shown that programming focused on one domain risks reversibility and harm if it fails to engage the other domains for gender-transformative change (Martinez 2006; World Bank 2012).

Women’s empowerment is often framed by development industry actors (donors, international nongovernmental organizations [NGOs] and governments) as “unleashing the potential” of women to drive economic growth

in terms that are more market oriented than gender transformative. Over the past two decades, development actors have redefined the term by focusing more on individual improvement than social change and framing empowerment as a means for development efficiency, often tied to neoliberal models (Razavi and Miller 1995; Cornwall 2014). This has shifted gender-transformative change in development to a technical issue aimed at incorporating women into existing market (or other)

systems rather than a political one that may question how systems are established and function to perpetuate inequality, exploitation and exclusion. As a result, this perspective tends to ignore how macroeconomic

policies and large-scale development initiatives affect women’s autonomy (e.g. in relation to land ownership, local seed system autonomy, and women in agriculture technical programming), interact with existing power relations and social norms, and disrupt local agricultural systems (Razavi 2012). To reinforce the transformative nature of change, it is useful to emphasize how gender transformation relates to power and social justice. Gender-transformative change requires individual agency through critical analysis and awareness of how power inequalities affect relationships and opportunities, network-building to strengthen relationships (in homes and beyond), and organizing to influence structural change (Miller et al. 2006; World Bank 2012). This change is ultimately about transforming power relations, which can be understood by recognizing different forms of power:

- **Power over** is used to privilege certain people over others. The most commonly discussed form of power, power over involves denying certain groups access to important resources (e.g. land) and services (e.g. healthcare and jobs), as well as control over others’ lives (e.g. mobility and political domination). In the absence of alternative forms of relating to one another and more affirming relationships (Miller et al. 2006). It is directly linked with Fraser’s (1996) framing of social justice:
  - 1) **redistribution** : distribution of power, resources, opportunities and assets (power over resources);
  - 2) **recognition** : value given to different groups and their noneconomic or holistic aspects to well-being, as well as to household, market, reproductive and

*We have to talk about liberating minds as well as liberating society*

*- Angela Davis*

productive activities and measures (power over ideology).

- **Power to** involves the potential of a person or group to form, pursue and realize aspirations for their life and society. This can include education, skills, capabilities and the confidence to exercise them. This directly ties to the agency domain of change (Miller et al. 2006).
- **Power within** refers to a person or group identity's sense of self-worth, self-awareness, self-knowledge and aspirations, which are also related to agency (Miller et al. 2006).
- **Power with** involves collaborative and collective power with others through mutual support, collaboration, recognition and respect for differences. This can take place at multiple levels, from household and intimate relationships to cooperatives and collectives, as well as broader-level coalitions and movements for change. This offers a normative alternative for structural transformation, upheld through more equitable and affirming gender relations (Miller et al. 2006).

Pursuing gender justice focuses on transforming oppressive systems of heteronormativity and patriarchy that shape societies (power over). However, it is important to acknowledge that pursuing structural change and social justice that expand the freedoms of one group does not necessitate diminishing the freedoms of another. The work of gender-transformative change is not to simply reverse systems of hierarchy and oppression but to seek liberation from them. Gender-equitable transformation grows more cooperative forms of power and relationships (power with) that affirm diverse people's critical awareness and dignity (power within) and their capabilities and aspirations (power to; Freire 1970; Hooks 2004; Miller et al. 2006). Indicators of these four dimensions of power are discussed in greater detail in Chapter 3 of this report. CARE's online [Gender Toolkit](#) also provides further discussion on analyzing and understanding relationships of power.

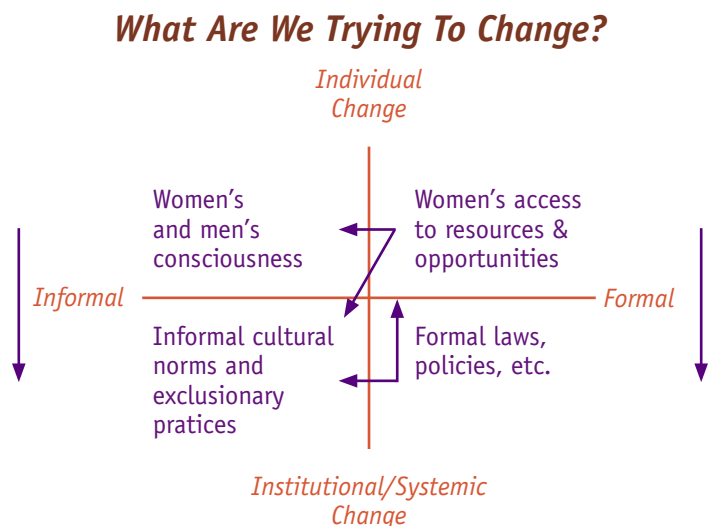
## 1.2 Measuring gender-transformative change

So what does all of this mean for measurement? Applying these concepts of gender, empowerment and power to questions of measurement, Kantor and Apgar (2013) note that transformative change has the following characteristics:

- multidisciplinary, holistic and multilevel
- emergent, multi-actor and relational
- sensitive to diverse actors' experiences of change.

### 1.2.1 Gender-transformative measurement is multidisciplinary and multilevel

Operating in the real world, interventions engage with dynamic (not static) societies, which are affected by other institutions (e.g. media, economic trends and opportunities) and a host of other factors. Experience has also shown that progressive shifts toward greater gender equity in one area of life (e.g. women are increasingly represented in the workforce) may be accompanied by setbacks in another (e.g. rising rates of gender-based violence; Martinez 2006). The multiple factors and actors at play suggest the need for measurement of gender-transformative change to take a systems approach (Narayan 2005). Rao and Kelleher (2005) offer a useful frame to begin thinking about what to consider for the multiple levels and dimensions of gender transformation, from individual to systemic change and across informal and formal spheres of life (Figure 1).



**Figure 1. Gender at work. Adapted from Rao and Kelleher 2005, 60.**

## **Holistic – across the scale of individual to systemic change:**

- Current practice shows that the most commonly tracked areas of change tend to be focused on the individual agency level (Espinosa 2013). While important, this fails to capture how relations are forming or transforming to support gender change at household and community levels, as well as how norms and legal frameworks are shifting to promote gender equality. For any dimension of change (e.g. women's land ownership), analysis has shown that there are implications across agency, relational and structural domains (e.g. agency: rates of women-owned or jointly owned land and making decisions over its management; relational: supportive and communicative household relations, support networks for land management and cultivation; structural: social norms, inheritance practices and legal provisions surrounding women's land ownership; Martinez and Wu 2009).
- Individual agency-level change indicators tend to focus on tangible areas of change such as assets and income, which reflect both what is countable and market-driven values (Narayan 2005; Cornwall 2014). Conversely, less tangible dimensions of change, such as psychological measures and well-being, are generally not explored (Narayan 2005).
- Measures of change also miss opportunities to understand change in terms of historical, social and political contexts (Narayan 2005). An example of this can be found in gender parity measures for girls' enrollment in education. While a common proxy for gender-transformative change, this measure cannot capture the quality of participation within girls' education and may not be sensitive to boys' dropout rates, which can "equalize down" toward gender parity (UN Women 2013). Grounding indicators in the social environment and local histories helps interpret meaning and significance behind specific types of change (Martinez and Wu 2009).

## **Multidisciplinary and multilevel – across informal and formal spheres of life:**

- When examining institutional change, research tends to focus on formal structures (laws, policies and services) and often misses nonformal structures (norms, values and institutions). This is reflected in disproportional measurement around legal and political change, with less attention to changes in social norms (Martinez 2006).

- Studies also tend to pay greater attention to how women's lives are changing as economic and political actors within markets and communities, with less attention toward change measurement within household relations (World Bank 2012). This is an important gap, as household dynamics often have spillover effects across all areas of life (Mayoux and Mackie 2007).
- Gender-transformative change measurement also tends to focus narrowly on change within the sector of programming (Espinosa 2013). However, gender-transformative change is multidimensional in nature, so measurement taking such a narrow view of change may represent a missed opportunity for understanding the true impact of interventions or blind spots for monitoring risks and setbacks (Martinez 2006).

### **1.2.2 Capturing the complex, relational and emergent nature of change**

Gender-transformative change is unpredictable and non linear, and involves multiple influences of diverse actors and agencies (Batliwala 2006; Kantor and Apgar 2013). As such, attribution to gender-transformative change is not a realistic expectation. Rather, measurement can examine how programming contributes toward gender-transformative change alongside the diverse set of actors, trends and events that shape social environments (Narayan 2005; Batliwala 2006).

To make sense of these complexities, organizations often operate around theories of change, which are sets of hypotheses (best guesses) on how change happens. These theories of change can account for shifting norms and trends in gender relations and power—across agency, structure and relations—and should be informed by a robust gender analysis. Gender-transformative theories of change must articulate the choices and debates that shape how an organization sees change happening and the role of programming within this. This can help staff to debate and test theories of change to identify assumptions, track how things are changing and improve practice (Eyben et al. 2008).

In terms of relations, development organizations have also increasingly acknowledged the importance of household relationships and of identity politics—particularly in relation to masculinities and femininities—as important indicators for examining current gender structures and change (Barker 2003; World Bank 2012; CARE 2014c). To integrate gender relations into theories of change, the Institute for Development Studies'

Pathways research on women's empowerment and gender equality put forward three strategic areas for gender transformation (Cornwall 2014):

- **economic empowerment:** household economies and division of labor, labor markets, control over one's life, and access to services and resources
- **political empowerment:** collective action, mobilization, movements, representation and influence
- **bodies and sexualities:** pleasure, bodily integrity and control over one's body, shifting social norms, and violence.

In the process of defining Sustainable Development Goals in 2015, NGO groups have also been lobbying for greater attention to social norms and complexity surrounding development targets to transform gender-discriminatory systems (Harper et al. 2014; Morgan 2014). Issues related to norms and identity politics highlight the importance of paying attention to structural factors like patriarchy, heteronormativity, and homo- or transphobia underlying gender inequality, which are often woven into the fabric of societies and easy to overlook (Martinez 2006).

Analysis of drivers of gender inequality and how people of different gender identities are affected in distinct ways can inform which institutions and structures to target for gender-transformative change and measurement across formal and nonformal domains (Bamberger and Podems 2002; De Waal 2006; Podems 2010). This information may be culled from existing indices at broader levels; however, gender analysis at the community level can help project teams understand the specific ways gender relations and norms are exercised at local levels and how they may interact with interventions (Martinez 2006; USAID 2011). In Chapter 2 we present deeper discussion of gender analyses, including a look at norms and gender-transformative theories of change.

### 1.2.3 Capturing diverse actors' aspirations and experiences of change

Monitoring, evaluation and learning systems founded in gender transformation are grounded in people's visions for gender transformation and empowerment, understood through a critical analysis of how they sit within societal structures and norms. This will be discussed more in Chapter 2. To remain relevant and accountable to communities, gender-transformative monitoring, evaluation and learning systems start with those who are being targeted in order to form effective indicators for change. Over the course of programming, monitoring mechanisms are needed to ensure that measures remain relevant to operating contexts, shifting norms and

people's aspirations. Metrics must also be sensitive to social upheaval, such as conflict and other emergencies, which can shift gender relations and livelihood contexts in unpredictable ways (Batliwala 2006).

Gender-transformative measures of change specifically examine change with a focus on different identities, experiences, histories and power relations faced by women and men across class, ethnicity, race, sexuality, religion, etc. Acknowledging and exploring diversity and difference among women and among men is an important first step toward identifying ways forward. For organizations committed to supporting socially excluded and marginalized communities, this understanding is central for effective and transformative programming and measurement. To capture these nuances, monitoring, evaluation and learning systems and indicators can usefully be informed by an understanding of local histories, social differentiation, and gender dynamics within and across groups to gain a picture of how gender relations are shifting, and for whom (Martinez 2006). Chapters 2 and 3 provide further discussion on this subject.

Part of gender-transformative measurement relates to how change is happening and experienced (empowerment processes) alongside descriptive measures about what has changed (Narayan 2005; Espinosa 2013). Descriptors of what has changed may not be very meaningful or sustainable without also gaining a sense of the pathways of change and how changes are experienced by diverse actors (Narayan 2005; Batliwala 2006). Measurement should seek to capture the process of gender-transformative change as driven through the ownership and will of marginalized people within societies (Narayan 2005; Kantor and Apgar 2013). In addition, monitoring systems must pay particular attention to observing, mitigating and responding to the gender-based violence women and men may face in relation to programming initiatives and livelihoods work. This is important for advancing gender-transformative programming, as well as ensuring accountability to communities to do no harm (Bloom et al. 2014). Approaches and indicators to capture change outcomes and processes of change are further discussed in Chapters 2 and 3.

# Chapter 2: Monitoring, evaluation and learning systems that facilitate gender-transformative processes

In their seminal review and critique of current monitoring and evaluation frameworks and approaches in the context of women's rights, gender equality and women's empowerment work, Batliwala and Pittman (2010) posit that for social change processes like gender-transformative approaches, monitoring and evaluation needs to examine how change happens, to analyze the role of the program in the change process, to empower and engage stakeholders to be part of the analyses of change so the change can be sustainable, to be accountable to donors but more so to the program's constituencies, and to advocate for social justice and mobilize broader support for the change agenda. For monitoring and evaluation to help learning and not just to evaluate performance in the context of gender-transformative approaches, it is appropriate to talk about monitoring, evaluation and learning rather than only monitoring and evaluation.

The vast majority of gender monitoring and evaluation appears to pay attention mostly to data disaggregation by sex, women's participation and improvements in women's situations, with little or no attention paid to impacts on women and on men in terms of changes to unequal gender relations (Espinosa 2013). When evaluations do go a little further and look at gender issues, they usually only focus on a descriptive analysis of inequality but do not incorporate a feminist approach to its structural causes and how to challenge them (Bamberger and Podems 2002; Podems 2010). Podems (2010) and Espinosa (2013), based on reviews of monitoring and evaluation of gender programming in international development programming, have laid out clear arguments for why incorporating a feminist approach to monitoring and evaluation for gender-transformative approaches is critical.

Feminist evaluation is based on feminist research, which in turn is based on feminist theory (Podems 2010). Feminist theory is guided by a common belief that "gender bias exists systematically and is manifest in the major institutions in society" and "feminism examines the intersection of gender, race, class, and sexuality in the context of power" (Mertens 2005, 154). Feminist evaluation theorists often describe feminist evaluation as being flexible rather than making strict recommendations or providing a framework; it is described as a way of thinking about evaluation (Hirsch and Keller

1990; Beardsley and Hughes Miller 2002; Hughes 2002; McRobbie 1982 in Podems 2010). Applying a feminist evaluation lens brings a distinct perspective that is epistemologically critical when considering monitoring, evaluation and learning for gender-transformative approaches (Podems 2010). While mainstream gender evaluations typically only map gender inequities, feminist evaluations recognize that evaluations have the ability to reinforce inequities or challenge them and therefore explicitly attempt to address inequities in women's lives, as well as the lives of other marginalized persons (Podems 2010; Hay 2012). This is done by choosing tools that are designed to unpack the differences and inequities that exist and by using the knowledge generated to address these inequities (Batliwala and Pittman 2010). Also, in acknowledging that there are many ways of knowing, which are filtered through the knower, feminist evaluation acknowledges that women may have explanations that differ from men's explanations of reality and knowing (Podems 2010).

*What to learn, how to learn, why learn, why and for whom do we learn—and consequently, why and against whom do we not learn—are theoretico-practical and not intellectual issues that we propose regarding the act of learning...there are, for this very reason, no neutral specialists, "owners" of neutral techniques...there are no "neutral methodologies."*

*- Paulo Freire*

With its roots in feminist theory, its emancipatory intentions, its explicit acknowledgment of evaluation as a political process, and its focus on gender inequities as a key foundation of social injustice, feminist evaluation is in very close alignment with the values and theoretical underpinnings of gender-transformative approaches and hence an extremely relevant lens for them. Below we outline some specific enhancements for any monitoring and evaluation system utilizing a feminist evaluation lens.

## 2.1 Monitoring staff and organizational gender equity and diversity awareness and practice

To be able to undertake robust gender analysis and program design, program staff and partners themselves must be sensitive to norms, relations and power—in terms of gender as well as other axes of power and social relations. Organizations are increasingly recognizing the need for internal reflection and reform to mirror gender equity among staff and partners as individuals as well as within organizations. This is grounded in the recognition that the idea of gender-neutral development—and a gender-neutral development worker—is a myth. All of us hold specific perceptions and values related to gender, and all community programming—whether it has a specific gender focus or not—interacts with gender relations.

Acknowledging this, some organizations facilitate structured spaces for gender reflection among staff and partners before undertaking any community analysis or programming. For example, Cole et al. (2014, 11) note that in AAS, led by WorldFish, “integrating a gender-transformative approach within AAS demands deep attitudinal and behavioral changes, or shifts in social and gendered ‘habits of mind’ and hearts, from all involved. ... [This requires] a constant and sustained investment in strengthening gender capacities, skills and fostering of new gender-aware ways of viewing the world among staff and partners, and among women and men from the communities where AAS operates, and nurturing of an organizational culture in which principles of gender equality and diversity are valued and embedded in everyday operating practices.”

In another example, CARE has structured spaces for staff and partner self-awareness and dialogue on gender and diversity through its gender equity and diversity training modules, as well as through specific initiatives (e.g. Inner Faces Outer Spaces Initiatives, Social Analysis and Action). These modules aim to raise awareness of difference, facilitate dialogues across groups on gender and privilege, and promote more gender-aware and equitable ways of working. (See more on the CARE Gender Wiki, [Gender Equity and Diversity Page](#) The SASA! Program from Raising Voices also includes gender training for all staff, partners and volunteers. Additionally, it offers training for staff to effectively facilitate structured reflection on gender and violence, mentor others, and grow as activists in their communities (see its [staff skills library](#) online).

Some CARE programs have begun to measure staff change over the course of a project. In Zimbabwe, one of CARE’s education programs included a project-wide gender capacity assessment for staff as part of its gender analysis process. CARE Sri Lanka has developed a set of questions to track staff perceptions of empowerment and gender perceptions and attitudes in relation to decision-making, division of labor, gender-based violence and homophobia (CARE Sri Lanka 2012). In Mali, CARE worked with staff to define a short list of behaviors of gender-equitable men and women—in terms of joint decisions, workload sharing, modeling non-typical behavior and encouraging peers. Over the course of programming a quantitative scoring method is being used to track staff behaviors within personal relationships. This helps track progress over time and determine what behaviors are more difficult to put into practice. Difficult areas of change form the basis for staff dialogue and mutual support.

Additionally, some offices, such as CARE Burundi, Nepal, USA and Ethiopia, have conducted organizational assessments and climate surveys to track how aligned offices are between operational structures, procedures and partnerships alongside their gender-transformative goals and organizational identity. Some useful tools in this aspect are the InterAction gender audit tool for organizational transformation (2009) and CARE Canada’s [gender equality health check method, framework and survey instruments](#) (2012).

## 2.2 Social and gender analysis

Gender analysis frameworks are essential instruments for understanding gender inequalities and can be a key tool to visualize the main areas where gender inequality exists in a target community (Espinosa 2013). Incorporating a gender analysis framework into the monitoring, evaluation and learning system before program planning is therefore a critical step for gender-transformative approaches.

For example, social and gender analysis is embedded in AAS work as an important part of a transformative approach, and gender is further assessed across all AAS analysis (Cole et al. 2014). This kind of analysis is useful in considering how existing gender relations and inequality may interact with programming interventions as well as identifying ways to advance gender transformation through the work.

While there are many analytical frameworks that can be used for a gender analysis (see Batliwala and Pittman 2010 for a review of the key ones), they don't necessarily hold central the goal of identifying the source of power or social inequities, which therefore doesn't provide what is truly needed to create targeted initiatives to decrease these inequalities. Two recent frameworks articulating what to look at in gender analysis come from the United States Agency for International Development (USAID) and CARE (Table 1).

Looking across these resources, there are many overlapping areas of inquiry. Across each area, the documents also emphasize the need to examine diversity among groups of women, men, girls and boys. Both also

take note of social norms in relation to each of the areas of inquiry and how they are changing over time.

Two differences between the frameworks are CARE's additional focus areas of (1) aspirations for oneself and (2) specific attention to gender-based violence (the latter of which USAID covers in a separate agenda). For gender-transformative programming, however, these are critical issues for exploration (Martinez and Wu 2009; Bloom et al. 2014). CARE's recent modification of the WEAI, which was developed by the International Food Policy Research Institute (IFPRI) for USAID-funded programs, offers a practical illustration of how a gender analysis such as CARE's can be used to inform a monitoring and evaluation system. For CARE's Pathways to Empowerment agriculture

**Table 1. USAID and CARE gender analysis frameworks.**

USAID Gender Analysis Guidance (2011)	CARE Good Practices Framework for Gender Analysis (2012)
<p><u>Access</u> – access to resources to advance livelihoods (business, property, technologies, services, etc.)</p> <p><u>Knowledge, beliefs and perceptions</u> – beliefs surrounding gender identities and behaviors, knowledge and perceptions, self-confidence</p> <p><u>Practices and participation</u> – people's behaviors and actions, gender roles and responsibilities, how people engage development activities based on gender</p> <p><u>Time and space</u> – availability and allocation of time, gender division of labor, mobility</p> <p><u>Legal rights and status</u> – how people are treated in law, courts and policy (e.g. voter rights, property and inheritance, citizenship, etc.)</p> <p><u>Power and decision-making</u> – ability to make decisions, influence and control personal, family and community power</p>	<p>Preliminary foundations:</p> <p><u>Social norms and values</u> (masculinities, femininities, values, etc.) – expectations on individuals regarding behaviors, actions, choices, rites of passage</p> <p><u>Policies and laws</u> – pertaining to rights based on gender</p> <p><u>Development outcomes by gender</u> – drawn from secondary data</p> <p>Areas of inquiry:</p> <p><u>Gendered division of labor</u> – Who does what? What are implications for this work in regard to opportunities, constraints and status?</p> <p><u>Household decision-making</u> – How are decisions made within the household? What are strategies for influence?</p> <p><u>Control over productive assets</u> – Who has control over and benefits from various productive assets?</p> <p><u>Access to public spaces and services</u> – accessibility, safety and accountability of public spaces and services for diverse people, with particular attention to gender and age</p> <p><u>Claiming rights and meaningful participation in public decision-making</u> – knowledge of rights, space and ability to fully engage in public decision-making in terms of representation, movements and spaces for negotiation</p> <p><u>Control over one's body</u> – ability to have power over one's own body (e.g. negotiating sex, safe work, family planning, marriage choice)</p> <p><u>Violence and restorative justice</u> – forms, nature and characteristics of gender-based violence, response to it, restorative justice approaches</p> <p><u>Aspirations for oneself</u> – self-worth, self-knowledge and aspirations for the future</p>



program, the WEAI was modified to capture dimensions of CARE's gender analysis framework that were not in the WEAI, including mobility and a section on gender-equitable attitudes, which included attitudes toward gender-based violence and expectations about men's and women's roles and capabilities. A qualitative inquiry (rather than time-use data sheet) was used to analyze division of labor data. A qualitative mid-term evaluation was integrated into the monitoring and evaluation system to capture the important dimensions of women's aspirations and trends in gender-based violence (Kruger 2013). The discussions below focus on these two elements as key areas of inquiry for gender-transformative measurement along with a conversation on social norms that a program can consider when carrying out a gender analysis process.

### 2.2.1 Measuring local aspirations for gender-transformative change

The selection of indicators for measuring complex and context-specific concepts such as gender-transformative change or empowerment is a value-driven and political process (Mayoux 2000). In addition, changes in gender relations are not easily quantifiable and documenting them can involve the development of qualitative indicators that are based on people's perceptions of their own process of change (Bell et al. 2007). Hence, understanding local visions for gender-transformative change from the groups most affected by gender oppression is a critical first step to inform programming and measurement. This kind of participatory approach to identifying what gender-transformative change looks like helps identify contextually relevant and locally owned indicators (CIDA 1997 in Ibrahim and Alkire 2007; Alsop and Heinson 2005). Beyond this, understanding marginalized people's aspirations can begin reflective discussions on how gender shapes people's lives, and can offer an opportunity for priority impact groups to discuss issues relevant to them (Mertens 2005). This step can also help sectoral programming consider gender-transformative change that may go beyond the immediate scope of project logframes and program objectives, as well as identify entry points for supporting local leaders among marginalized groups to actualize transformative change (Hillenbrand et al. 2014).

In practice, gender analyses have used visioning exercises and descriptions of role models—through drawing, discussion and theater—to surface what change may look like for gender transformation. Examples of specific processes and indicators generated from them are discussed in more detail in Chapter 3.

Outcome mapping with participants and programmers can also identify sequenced visions for gender-transformative change. Outcome mapping focuses on tracking outcomes that result from changes in behavior, relationships or activities of stakeholders. Outcomes are not only outlined for direct recipients of an intervention, but also for all actors or groups targeted or potentially influenced, referred to as "boundary partners." The hallmark of outcome mapping is a focus on contribution to change, rather than directly attributing the results to a program's activities. Outcome mapping uses three core concepts: outcomes, boundary partners and progress markers. Typically, progress markers are identified for each boundary partner on a three-point scale: "expect to see, like to see, and love to see" (Carden et al. 2001, 53).

Additionally, carrying out a baseline study using combinations of participatory methods, secondary data and conventional methods like surveys when appropriate can also be an important step in placing the progress of gender-transformative approaches along selected indicators and making a case for the necessity of the intervention both among local constituents and for fundraising and advocacy purposes (Batliwala 2011).

These measures can be integrated into monitoring, evaluation and learning systems and revisited over time. As programming begins to open the door for gender transformation, practice often shows that the horizons for people's change aspirations and expectations also broaden (Martinez 2006).

### 2.2.2 Exploring gender-based violence

USAID (2014, 3) defines gender-based violence as follows: "Violence that is directed at an individual based on his or her biological sex, gender identity, or perceived adherence to socially defined norms of masculinity and femininity. It includes physical, sexual, and psychological abuse; threats; coercion; arbitrary deprivation of liberty; and economic deprivation, whether occurring in public or private life."

The USAID *Toolkit on Gender-Based Violence and Economic Growth* (2014) identifies specific forms of gender-based violence that relate to economic programming:

- domestic and intimate partner violence
- sexual harassment and intimidation
- gender-based workplace or market discrimination, stigmatization and social exclusion
- sexual exploitation and abuse
- trafficking and forced labor.

Integration of gender-based violence monitoring and mitigation into the monitoring, evaluation and learning systems of gender-transformative approaches is a critical part of ethical programming (Bloom et al. 2014). In a gender-transformative approach, attention to gender-based violence is crucial for two reasons:

- 1) Tolerance and acceptability of violence on the basis of gender is a primary indicator of the subordinate value attached to women's—as well as nonconforming males'—lives and worth. Gender-based violence is rooted in societal structures of gender inequality. It is also used as a tactic to reinforce unequal power relations and can act as a major obstacle against gender-transformative programming (Bloom et al. 2014). Threats of violence (whether psychological, emotional, economic or physical) are a pernicious tool for maintaining relationships of unequal control over use of resources, women's behavior, mobility, and authentic and equitable decision-making involvement.
- 2) The redistribution of power (economic or social) can pose a threat to those in dominant social positions. Gender-transformative approaches that challenge social norms or structures or threaten the social hierarchy can result in men's use of violence as an expression of dominance (IDS 2011; Eves and Crawford 2014). Hence, it is essential that all programs engaging in gender-transformative approaches include mechanisms for monitoring trends and risks in gender-based violence.

As gender-transformative programming interacts with existing gender relations, an exploration around gender-based violence can happen during a gender analysis exercise. However, given the sensitivity and taboos surrounding violence, particularly gender-based violence, it can be difficult to gain a sense of gender-based violence issues within programming contexts. Asking survivors to report experiences of violence may put them at risk if the perpetrator or others learn of disclosures. There are also risks in the measurement process itself, which may cause distress among survivors (Bloom 2008). The World Health Organization (WHO) [ethical and safety guidelines](#) offer detailed guidance on safety and confidentiality.

To explore gender-based violence within the gender analysis process, a first step can be to review what data exists in the programming area (Bloom et al. 2014). Programs can then undertake methods to understand dynamics around violence, such as constructing local histories, community social mapping exercises, surveys or discussions on perceptions and attitudes in relation to violence, and community drama exercises ([CARE Gender Toolkit](#)). These exercises can offer insights on gender-

based violence broadly within the community. In this way, programs can have an understanding of the initial gender-based violence dynamics in a community.

The gender analysis process for gender-transformative approaches can also include a resource mapping exercise that facilitates the creation or identification of referral lists for use by program staff. In addition, while not specifically linked to the gender analysis or the monitoring, evaluation and learning system, it is important that specific staff training on gender-based violence is planned and budgeted for from the planning phase of a gender-transformative approach (Bloom et al. 2014).

### 2.2.3 Exploring social norms

Both personal aspirations and gender-based violence can be understood through dominant social norms. Social norms measurement—particularly in relation to gender transformation—has received increasing priority over the past year as the United Nations prepared to define its post-2015 framework. This has taken place mostly through what the Millennium Development Goals failed to do and acknowledgement that social norms represent a critical component for influencing transformative change, with implications for all parts of life (Harper et al. 2014). According to Harper et al. (2014, 2), social norms are “the informal and formal laws, beliefs and practices that help to determine collective understanding of what are acceptable attitudes and behaviours ... [and] can either drive processes of social change or act as brakes and barriers to such processes.” Unpacking norms and how they are shifting can offer valuable insights on gender-transformative pathways of change over time. This may be tracked against people's perceptions and beliefs, their choices and behaviors, and what they feel are “normal” or typical behaviors and attitudes within community contexts (Bicchieri and Mercier 2014). It is important to note here that this area of measurement has to date been underdeveloped.

CARE has been exploring this area of work based on a theoretical and measurement framework for social norms. From this experience, CARE has identified types of social norms data one can consider collecting as part of a gender analysis process:

- personal normative beliefs—what do you think?
- behaviors – what do you do?
- empirical expectations – what do others do?
- normative expectations – what do you think others think you should do?

There are several potential uses of this kind of data, particularly for diagnostic purposes for developing gender-transformative strategies:

- 1) This data can be used to compare personal normative beliefs with normative expectations, to see if there is a discrepancy or misperception between people's actual normative beliefs and what they think others think they should do (pluralistic ignorance). If this is the case, a strategy is to correct this misperception or make good attitudes known. The same applies to comparing people's actual behaviors with what they think others do (empirical expectations), and if there is a misperception (e.g. overly pessimistic about what others do), to correct this by making good practices or behaviors known. normative beliefs and what they think others think they should do (pluralistic ignorance). If this is the case, a strategy is to correct this misperception or make good attitudes known.
- 2) The same applies to comparing people's actual behaviors with what they think others do (empirical expectations), and if there is a misperception (e.g. overly pessimistic about what others do), to correct this by making good practices or behaviors known.

Similar to the discussion on gender-based violence, relationships matter when it comes to facilitating honest conversations about social norms (Bicchieri and Mercier 2014). Formats for discussions include focus groups, interviews, drama or role-play, and survey techniques. For example, the International Men and Gender Equality Survey (IMAGES) administered a set of questions on men's and women's actions, beliefs and perceptions related to masculinity, gender relations and violence. Social norms are inextricably tied not only to individuals, but to shared normative beliefs (intersubjective consensus), and changes need to happen at a collective level. As such, in terms of measurement, Bicchieri and Mercier (2014) assert that another level of questioning should also consider what people regard as the typical or normative case among participants' reference group in order to identify broader social norms. Over time, projects can monitor divergence between people's beliefs, actions and perception of normative behaviors within the community. Using qualitative methods to capture all three may help elucidate where people are in the stages of change. Applying the theory of cognitive dissonance, the We Can Campaign against gender-based violence specifically targeted social norms change. It suggests, "When attitudes and behavior conflict, two different things can happen—people can gradually shift their attitudes to agree with their behavior, or more commonly, shift their behavior to be more consistent with their attitudes. In reality, everyone is constantly juggling with these

conflicting forces, as attitudes tend to be much harder and slower to shift than behavior" (We Can Campaign 2011, 28).

At the institutional level, the relationship between the legal mandates and the actual situation of social institutional life may be examined (Harper et al. 2014). Also, beyond the gender analysis phase, it is important to track social norms linked to gender for gender-transformative approaches. Further discussion on how to do so for specific indicators is provided in Chapter 3.

These areas of gender analysis cover broad dimensions of life and societies. However, casting a wide net offers a starting point for narrowing down strategic issues and institutions for gender-transformative change and monitoring, evaluation and learning systems.

## 2.3 Gender-transformative theories of change developed through participatory methods

As discussed in Chapter 1, to make sense of complex social change processes like gender-transformative change, organizations often operate around theories of change, which are sets of hypotheses (best guesses) on how change happens. Having a theory of change can make explicit the fundamental assumptions of why a program should work, and its use can enable the monitoring, evaluation and learning system to generate information that can help us understand how an intervention works (Weiss 1995). This has been found to be useful for planning gender-transformative approaches (Karim et al. 2014). In the context of gender-transformative approaches, developing a theory of change using participatory methods can have several advantages (Batliwala and Pittman 2010):

- Engaging the most critical stakeholders in defining what success looks like helps avoid misinterpretations by external evaluators, who often lack understanding of local realities.
- Mapping preconditions for achieving change with constituents strengthens the collective understanding of a program and its implementation.
- Both qualitative and quantitative indicators can be drawn from and designed to reflect local realities.
- Context-specific monitoring and evaluation systems that are sensitive to power dynamics can be created.
- Alternative or unexpected outcomes of a program can be highlighted and measured.
- A collective mapping process is used, which strengthens accountability and transparency across stakeholder groups, among staff, and in reporting to donors.

WorldFish utilizes theory-based evaluation (e.g. Rogers 2008) as a core component of its monitoring and evaluation system for AAS. An important part of its system is to develop theories of change and test them through cycles of reflection, planning and action. WorldFish specifically uses participatory action research as the methodology for this process in order to test the theories of change with key stakeholders and because it provides the rigor needed to be credible (Douthwaite et al. 2014). The theories of change are developed and tested at community, initiative, hub and program levels using the following participatory action research principles (Douthwaite et al. 2014):

- is owned by the participants, who define their real-life problems to be addressed through participatory action research
- recognizes multiple voices and power relations and, to ensure equity, requires facilitation to be mindful of who is participating and how they are participating
- emphasizes jointly shared responsibilities for collecting data and its analysis to support improved understanding and actions
- feeds results back to the participants for ongoing learning that is potentially transformative.

For a detailed example of how WorldFish has utilized a participatory action research approach for the development of theories of change, see Douthwaite et al. (2013).

For gender-transformative approaches, the development of a theory of change can begin with a study to provide a nuanced understanding of the nature of gender relations and gender constraints in the target areas, along with participatory consultations with both female and male stakeholders, including the most vulnerable groups, on their concerns and priorities (Bamberger 2013). A well-designed gender analysis can usually serve this purpose. The theory of change is meant to inform the program design as well as the monitoring, evaluation and learning system.

Some specific recommendations on how to ensure that the development and subsequent modification of the theories of change through a participatory action research process are using a gender-transformative and feminist lens are the following:

- Ensure the presence of gender expertise both during the initial development of the theories of change and during the reflection processes during which the theories of change are modified. This will increase the likelihood that gender-transformative aspects are brought to the forefront of discussions.

- Apply a feminist lens to the participatory action research process through which the theories of change are being developed and reflected upon. While specific methods are not feminist per se, applying a feminist lens means gauging their ability to generate authentic and trustworthy data that can explain change around the inequity that a program is trying to address. When using participatory approaches, we run the risk of silencing positive results (Batliwala and Pittman 2010). In such cases, applying standards based on a constructivist paradigm—the basis of a feminist evaluation approach (Brisolara et al. 2014)—such as trustworthiness criteria, process scrutiny and authenticity criteria (as per Lincoln and Guba 2011) provides a lens that can judge the participatory exercise based on standards that are more relevant than those based on a positivist paradigm (internal and external validity, reliability, and objectivity).
- Build into the participatory action research process a step to review the extent to which the theories of change that are generated embody the following characteristics of gender-transformative approaches (from the [IGWG Continuum](#)):
  - fosters critical examination of inequalities and gender roles, norms and dynamics
  - recognizes and strengthens positive norms that support equality and an enabling environment
  - promotes the relative position of women, girls and marginalized groups
  - transforms the underlying social structures, policies and broadly held social norms that
  - perpetuate gender inequalities.

## 2.4 Monitoring outcomes

The kinds of changes that gender-transformative approaches aim to shift are ambitious, typically take a long time, and rarely progress in linear fashion. In such a context, a responsive monitoring, evaluation and learning system must be able to see change as a process with progress markers instead of an endpoint and final product (Guijt 2008). This means the monitoring, evaluation and learning system must accommodate the documentation of small incremental changes, such that “the downstream long-term results become the lighthouse that guide the action and not the rod with which impact is measured” (Ortiz and Pacheco, personal communication, 8 April 2005, *in* Guijt 2008, 8). It is important to measure the interim changes within specific stakeholder groups and the contribution of gender-transformative approaches to enabling those changes by setting up assessment systems and tracking tools with indicators that are realistically synchronized to the time frames (Batliwala 2011).

Outcome mapping is a monitoring and evaluation approach that has a particular focus on the use of progress markers (Carden et al. 2001). Outcome mapping can be used as part of the social gender analysis process to identify sequenced visions for gender-transformative change. AAS has built on this by including outcome mapping as part of the outcome monitoring component of the existing AAS monitoring and evaluation system. In the context of outcome mapping, progress markers are a set of statements describing a gradual progression of changed behavior in a boundary partner, leading to the ideal outcome challenge. These markers are a core element of outcome mapping and are useful in documenting desired changes that indicate progression towards the ideal outcome challenge and are able to articulate the complexity of the change process.

The progress marker tool helps in the development of a theory of change for particular actors based on concrete, observable behavior changes. The addition of outcome mapping to a system has the potential to help programs develop specific gender-transformative theories of change.

Progress markers work like indicators in that they are observable and measurable. However, they are different from traditional indicators in that they can be adjusted during the implementation process, can include unintended results, and specifically describe a behavior (individual, collective or organizational) rather than a change in state. In Chapter 3 we provide more specific examples of particular domains for which CARE has used an outcome mapping approach to understand and document gender-transformative processes.

## 2.5 Critical reflection with a gender lens

As mentioned at the beginning of this chapter, the “learning” in gender-transformative monitoring, evaluation and learning can play a critical role in going beyond just evaluating performance (Batliwala and Pittman 2010). One approach that complements a learning component by lending itself to the facilitation of reflective spaces with a critical gender and feminist lens is gender-based systematization. Systematizing “with and from a gender perspective” starts with the acknowledgment that different groups have unique experiences, knowledge and perceptions of interventions, and are affected by them in distinct ways. Systematization is a learning process that helps stakeholders describe and analyze the situation before intervention, after intervention and during the process of change. In the process, participants also learn to address the issues that emerge (Phartiyal 2006).

Rodriguez Villalobos et al. (2000, 11) present systemization from a gender perspective, saying that gender systemization aims to “improve the practices, activities and knowledge of those committed to changing reality, to analyzing the cohesion and implications of our actions, to overcoming gaps and weaknesses, and to emphasizing the elements that can transform reality and bring us closer to achieving gender equity. [This] involves overcoming activism and the everyday recurrence of procedures that have always been done in a certain way but no one has analyzed in terms of results. Unless critically analyzed, those procedures constitute a waste of resources and energy that otherwise could be dedicated to achieving our goal, i.e., the construction of equitable relationships. In summary, systematization allows rural development projects to understand how they reached their current situation and the reasons behind their own course of action, so that they can understand their actual efforts as well as those they must take in the future.”

The systematization process aims to build up and collectively interpret the story of diverse stakeholders’ experiences related to gender-transformative approaches. Through a series of dialogues, the systematization process aims to explore the following with diverse groups:

- the nature of programming, who was involved and how they related to one another;
- the evolution of programming over time, and what factors—gender, social, political, institutional and geographic—influenced this;
- expected and unexpected processes, meaningful moments or turning points, and changes over the course of the initiative;
- points of consensus as well as problems or debates that arose, and how they were addressed;
- lessons learned across different actors.

Stakeholders aim to agree on what specifically is the focus of the systematization, reflect on their own experiences, and articulate conclusions, lessons learned and recommendations, drawing from the diversity of opinions collected through this exercise. This process unpacks how different stakeholders experienced the initiative’s evolution and helps situate how strategies and adaptations interacted in the real world of societies beyond what was envisioned in initial proposals and planning (Tapella and Rodriguez-Bilella 2014).

## 2.6 Focus on and resources for participatory monitoring, evaluation and learning capacity building

Access and ability are two sides of the same coin. If one has the access to participate in monitoring, evaluation and learning but not the abilities to take advantage of that access, then the access is not an opportunity that can be tapped into. Similarly, if one has the ability but not the access, then the opportunity cannot be taken advantage of (Johnson 2000). Given that incorporating a feminist evaluation perspective into monitoring, evaluation and learning systems means prioritizing participatory approaches (Podems 2010; Espinosa 2013; Brisolara et al. 2014), access and ability can be considered critical features of a gender-transformative monitoring, evaluation and learning system. Proactive budgeting to assess the

individual skills and capacities within the implementing organization and among project participants can play an important role when setting up gender-transformative monitoring, evaluation and learning systems (Batliwala 2011), as well as for formal trainings (tools, conceptual and methodological issues, analytical framework, philosophical basis), experiential learning opportunities (exposure to participatory methods, incorporation of participation and monitoring and evaluation tools and methods into everyday activities, building from existing experiences, values and principles), and accompanying resources (financial, human, information, materials; Johnson 2000; Sorgenfrei and Buxton 2006). Hence, participatory monitoring, evaluation and learning capacity building needs to be a core component that is highly visible and adequately funded (Johnson 2000).



# Chapter 3: Indicators of gender-transformative change

In this section, we discuss specific indicators that are of relevance from a programming perspective. We also present examples of processes for measuring some of the indicators. The processes outlined in many cases are operationalized examples of some of the monitoring, evaluation and learning system components suggested in Chapter 2. The indicators, which are organized based on the power dimensions (Miller et al. 2006) presented in Chapter 1, are based on a review of existing practices and indicators of empowerment commonly used in development practice (Malhotra et al. 2002; Ibrahim and Alkire 2007; Golla et al. 2011). We also present some emergent domains for which there are not existing indicators in use but which gender-transformative approaches need to be mindful of. The main domains identified from the literature are organized to capture the four domains of power that were introduced at the beginning of this document:

- power over – control over income and labor, assets and resources; control over one’s mobility and body; control over the agenda
- power to – capacities, skills, awareness
- power within – internal and psychological resources
- power with – collective agency and action.

Each of these indicators is discussed and organized in three dimensions: agency, relations and structures. This recognizes that transformative change includes not only working with women to build new skills and confidence (agency), but to engage in women’s relationships and the structures and institutions (including belief systems and market institutions) that shape women’s lives (CARE 2014a). Along with the analysis of the indicators, we highlight several promising practices and processes for measuring these indicators, drawing from the work of CARE, AAS and others in the field.

## 3.1 Power over: Control over income, assets and resources

In this section we examine control over resources that are the precognitions for empowerment (e.g. income, assets, land, time), as well as control over people (particularly women’s mobility, autonomy and bodily integrity).

### 3.1.1 Income generation and labor

Women’s income generation and control are recognized as key levers in women’s decision-making power, agency, self-esteem and social esteem (Hill 2011; Kabeer and Natali 2013). Recognizing that labor markets are not neutral arenas but “social institutions that operate on the basis of social norms and power inequalities” (Razavi 2012, 5), this section draws attention to indicators regarding the active transformation of discriminatory social norms and structures around work and income generation; the recognition and distribution of productive and reproductive labor; the quality of work relationships, conditions and identity; and the consciousness-raising and collective action aspects associated with labor and income.

#### *Control over income and recognition of undervalued work*

Gender-transformative approaches that follow a value chain approach may challenge the social hierarchy that values productive work over reproductive (care) work and that ignores or discounts many of the hidden or invisible tasks in a male-dominated value chain that are performed by women. When the full value of women’s caregiving work to household economic and overall well-being is recognized, it contradicts the common claim that (male) breadwinners should have final say over household expenditures because of their greater income. Value chain analysis can be used to identify the unrecognized or underpaid roles that women (or men) play in a given enterprise, their relative earnings at each stage of the chain, and attitudes that need to be challenged. This assessment can be repeated periodically to discuss change in recognition, attitudes, quality of relationships and remuneration along the chain. Gender-transformative approaches track decision-making control not only over women’s own earnings, but their input into overall financial decisions in the household. Attitudes to track may include the recognition that women are farmers, fishers and producers and that their contributions are valuable change in recognition, attitudes, quality of relationships and remuneration along the chain. Gender-transformative approaches track decision-making control not only over women’s own earnings, but their input into overall financial decisions in the household. Attitudes to track may include the recognition that women are farmers, fishers and producers and that their contributions are valuable.

**Table 2. Control over income and labor.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>- Economic independence of women<sup>a</sup></li> <li>- Ability to make large and small purchases independently<sup>b</sup></li> <li>- Women’s positive evaluation of their economic contribution<sup>c</sup></li> <li>- Desire for equal rights to resources in the household and community<sup>c</sup></li> <li>- Proportion of women’s income spent on herself<sup>d</sup></li> <li>- Expansion into new markets<sup>a</sup></li> <li>- Women’s access to and use of information, technology and sustainable services<sup>a</sup></li> <li>- Capacity to negotiate in markets, especially negotiating prices<sup>a</sup></li> </ul>	<ul style="list-style-type: none"> <li>- Control over income from other household productive activities<sup>c</sup></li> <li>- Control over labor allocation<sup>c</sup></li> <li>- Changes in time use in selected activities, particularly greater sharing by household members of unpaid housework and childcare<sup>b</sup></li> <li>- Strengths of social and professional networks</li> <li>- Joint action to challenge discrimination and working conditions</li> <li>- Relationships of solidarity</li> <li>- Increased business networks, by gender</li> <li>- Women’s collective negotiation within the marketplace</li> <li>- Backlash against women’s economic empowerment (see violence indicators below)</li> <li>- Involvement and/or representation in local trade associations; access to markets</li> </ul>	<ul style="list-style-type: none"> <li>- Gender wage differentials<sup>e</sup></li> <li>- Cultural restrictions on the nature of women’s (and men’s) professions<sup>a</sup></li> <li>- Positive community images of women, their roles and their contributions<sup>e</sup></li> <li>- Scale of gender-equitable attitudes<sup>f</sup></li> <li>- Recognition of equal value of care work and subsistence work</li> <li>- Levels of economic stress reported by men and women</li> <li>- Shift in cultural expectations for women as primary caregivers and men as providers</li> <li>- Policies and provisions that support equitable labor participation (childcare support, toilet facilities, breastfeeding policies)</li> <li>- Representation and remuneration at different levels of the value chain, disaggregated by sex</li> <li>- Gendered rules governing access to productive assets and markets<sup>a</sup></li> <li>- Community and business perception that women can negotiate effectively</li> <li>- Leadership in economic collectives, cooperatives (by sex)</li> </ul>

Sources: <sup>a</sup>Alsop et al. 2006; <sup>b</sup>CIDA 1997 in Ibrahim and Alkire 2007; <sup>c</sup>Mayoux 2000; <sup>d</sup>Golla et al. 2011; <sup>e</sup>Malhotra et al. 2002; <sup>f</sup>CARE 2013.

**POTENTIAL PROCESSES**

**Survey.** The Cereal Systems Initiative for South Asia (CSISA) baseline survey module on income earning tracks the contributions of household members (by sex), including the amount of time invested in each activity and income generated from each. The decision-making section captures decisions over women’s own earnings and overall earnings, with nuanced response options that include “refuse” (to participate in decisions) and “if there is disagreement, whose opinion usually prevails?” However, CARE has found that even within certain tasks, such as “fish cultivation in homestead pond,” there may be further subdivisions by gender. CARE undertook to further disaggregate the division of labor involved with specific crops by asking people to describe (1) each task involved for the crop (digging, planting, weeding, processing, etc.); (2) who does what within each activity; and (3) where the money from the crop goes and who spends it (CARE Gender Toolkit).

**Value chain analysis.** CARE’s Pathways project mapped involvement of women in different value chains to identify which chains have greater potential for women to move up the ladder and gain more control over their time, production and income. This analysis is used to guide project implementers and to help them periodically measure the progress that women make in moving from being primary producers to the more lucrative and gender-transformative roles of processors and traders. Examples of such a map are found in Figures 2 and 3.

**Value chain mapping.** Similar to the Pathways value chain map, CARE Canada’s LINKAGES program offers a participatory process for doing value chain analysis with a focus group following the collection of quantitative baseline data. The guidance suggests repeating the focus group analysis—ideally with the same group of participants—in subsequent years of the project to assess changes in roles, remuneration and recognition (CARE



Canada 2013). This process can be transformative in that it engages participants in visual analysis of gender inequalities and in suggesting solutions.

**Participatory rural appraisal tools.** The International Fund for Agricultural Development (IFAD)'s toolkit *Gender and Poverty Targeting in Market Linkage Operations* provides participatory rural appraisal tools for tracking gendered control over and contributions to household income and crop management, as well as modules for assessing gender roles in marketing, including who sells what product where, who controls the income, and the consultative process in marketing decisions. This helps monitor the risk

that commercialization of a given crop or enterprise may undermine women's control over income (IFAD 2002, 103).

CARE's Pathways program used a participatory rural appraisal drawing tool called the cash-flow tree (Figure 4) to help participants visualize and discuss men's and women's income contributions and overall household decision-making control during a mid-term evaluation. Though used as a tracking tool, the discussion itself was transformative, as respondents became conscious that their opinion was only sought when their money was required, and they were able to engage in their own goal-setting.

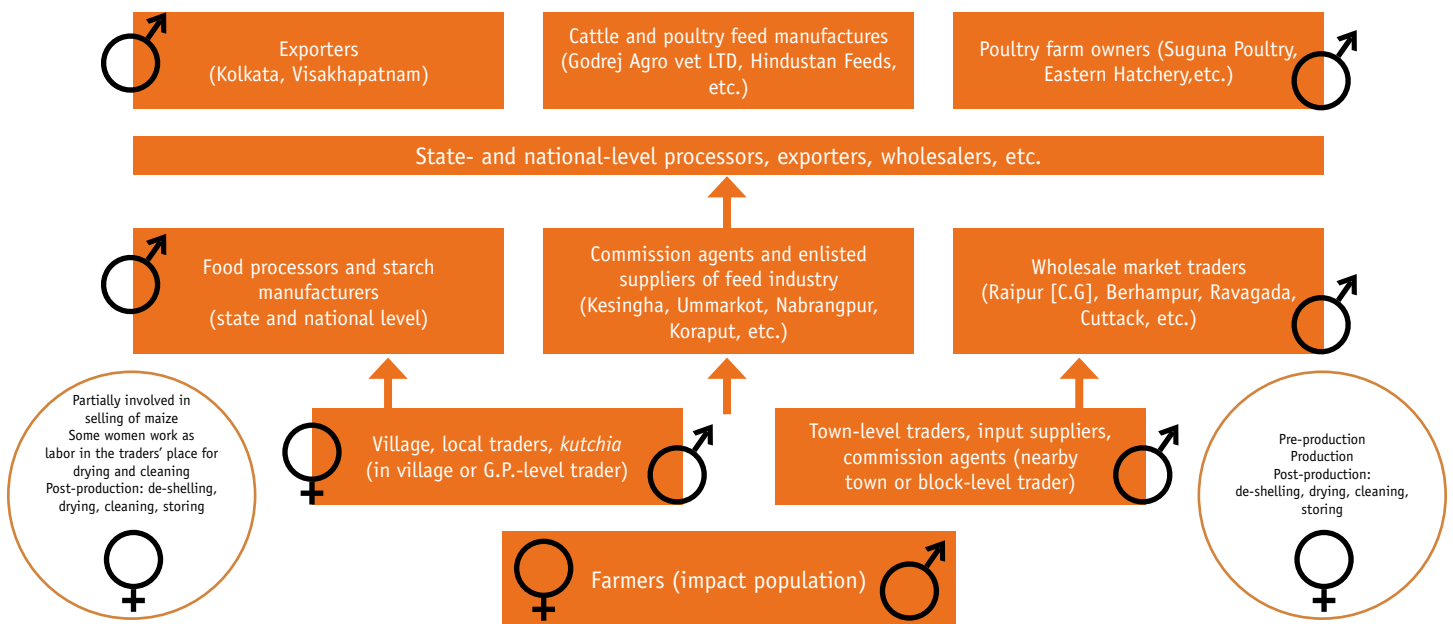
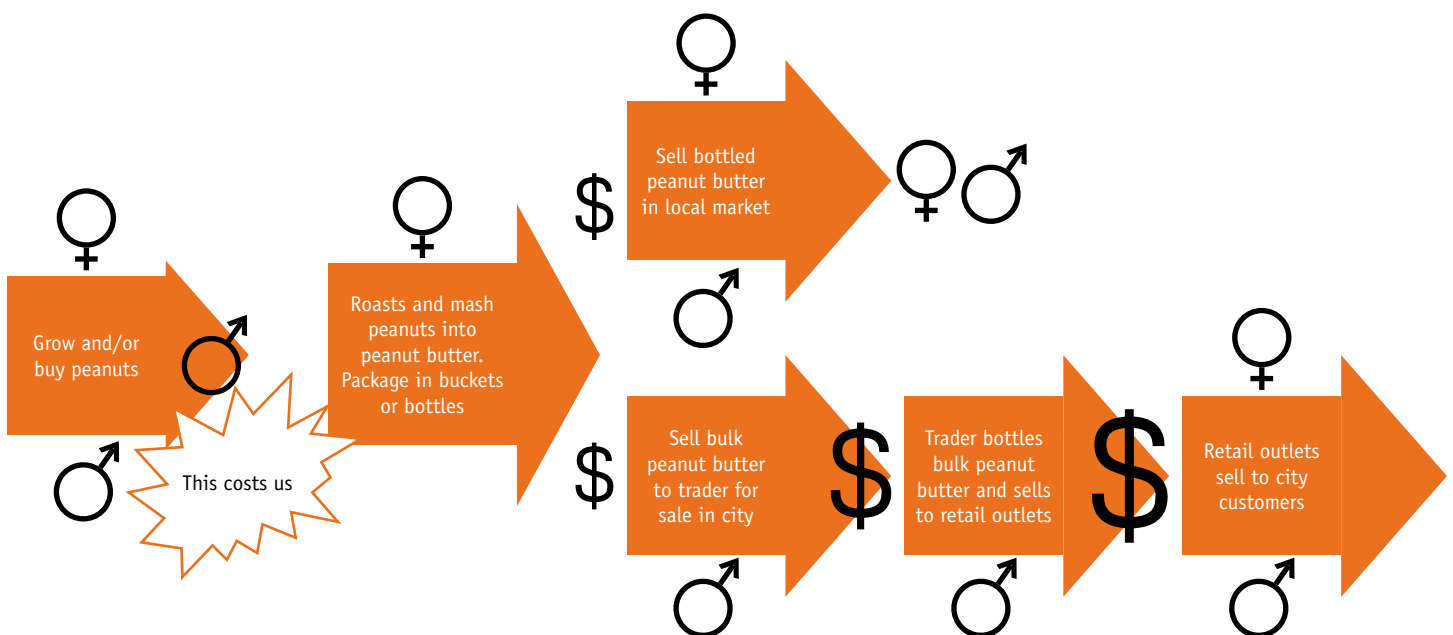
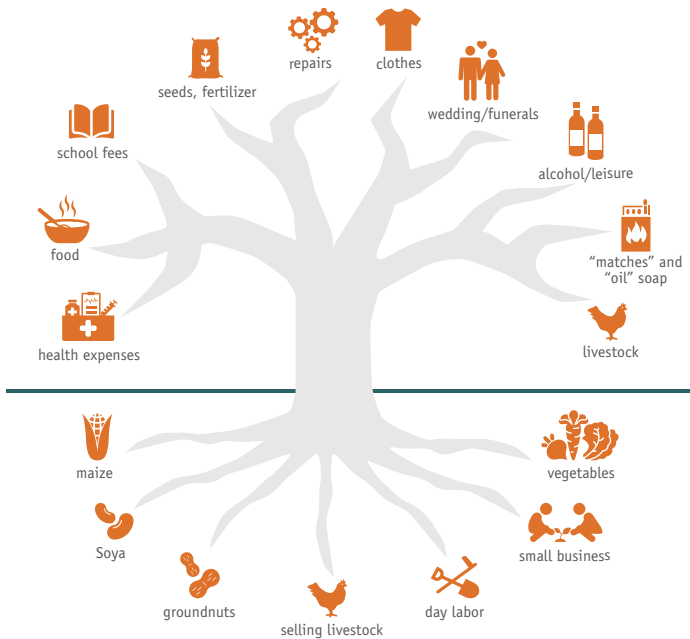


Figure 2. Example of maize value chain map.



Source: Capelazo, 2012.

Figure 3. Example of peanut butter value chain map.



**Figure 4. Example of cash-flow tree.**

*Social norms around work and markets*

Enforced in the media, through peers and through parental guidance, norms portray certain jobs or tasks as more appropriate for men or for women, limiting or shaping men’s and women’s aspirations, self-confidence and earning potential. In market negotiations, social norms about women’s capacity or permission to interact with nonfamily members may limit their negotiation capacity. In formal financial institutions, lenders may trust men more than women regarding the repayment of debts (Alsop and Heinson 2005, 13), while in informal or microlending institutions, where sums of money are smaller, women may be typified as more reliable than men but may also be used as channels for men’s access to finance. A careful gender analysis, as discussed in Chapter 2, can determine the specific attitudes and stereotypes to be challenged and tracked, and among which actors (for example, market intermediaries). Indicators for women’s participation and leadership within the economic sphere tend to examine changes in economic advancement (such as assets and income), confidence and skills, and access to services, information and technologies. Some studies have also paid attention to shifting networks and representation of women across specific economic sectors, alongside shifting community perceptions and norms in relation to women and men who occupy different types of professions. Measures of women’s self-confidence in market interactions should be complemented by indicators of community perceptions of women’s capacity and abilities in these arenas (Mayoux and Mackie 2007; Golla et al. 2011).

The social characterization of men as breadwinners and women as caregivers has far-reaching disadvantages for both men and women. Even when women bring income into the household, their wages may be portrayed as additional “pocket money” rather than essential income for their households (UN Women 2013, 26). On the other hand, social pressure on men to conform to hegemonic masculinities can be severe. When development projects target women only, or macrolevel market trends target (cheaper) female labor, or men are otherwise unable to conform to maintaining breadwinner status, the social punishment can be severe. Men may experience stress, depression or disempowerment or may abandon their families. To maintain their masculinity, they may exert “power over” in other spheres, sometimes through the assertion of violence or use of alcohol in male spaces (Esplen 2006; Heise 2011).

All gender-sensitive programs need to monitor shifts in gender-based violence that may result from shifts in intrahousehold power. Gender-transformative measures track flexibility and expansion in gender roles for both men and women, changes in men’s self-concept, and the breakdown of the rigid divisions between caregiving and productive roles. The International Center for Research on Women (ICRW) and Promundo’s IMAGES study tracked men’s work-related stresses, hypothesizing that these are more accurate indicators of men’s socioeconomic status than their monthly income or job status (Barker et al. 2011). The Gender-Equitable Men (GEM) scale developed as part of IMAGES presents a range of attitudinal questions reflecting norms of hegemonic masculinity. This scale has been tested and adapted for several countries; it has also been used to inform other attitudinal scales, including CARE’s Women’s Empowerment – Multidimensional Evaluation of Agency, Social Capital and Relations (WE-MEASR) scales for measuring empowerment in the health sector (CARE USA 2013) and in the “gender-equitable attitudes” module of the CARE Pathways program’s baseline-endline survey.

Time use is often framed as a livelihood capital over which women have limited control, putting them at a disadvantage compared to men in economic terms (“time poverty”). All gender analysis frameworks include a process for assessing the division of labor to monitor the risk that a given intervention may inadvertently add to women’s workloads. The WEAI includes “allocation of time to productive and domestic tasks and satisfaction with the available time for leisure activities” as one of the five domains of empowerment and includes an exhaustive time-use data sheet to capture survey data around changes in this domain. Others monitor the redistribution

of reproductive tasks within the household or “the extent to which other household members (husband, parents, children) participate in such chores as fetching water and firewood, cleaning, cooking, grocery shopping, taking care of children” (Alsop and Heinson 2005, 44). Gender-transformative approaches also take into account the recognition factor of gender justice, tracking adoption of positive attitudes and practices of men sharing caregiving and domestic tasks, and positive attitudes toward the fundamental importance of caregiving work or women’s capacities and skills.

#### POTENTIAL PROCESSES

**Survey.** In its gender attitudes and practices baseline survey, Nobo Jibon questions mothers, mothers-in-law and husbands on a range of attitudes toward gender, including the value of reproductive work and flexibility of gender roles. The module for men also includes a survey of men’s actual practices in domestic and child-caring roles (HKI and Save 2010).

**Outcome mapping.** CARE’s Pathways program used an outcome mapping process to identify behavior changes in men (as noticed by both men and women). Tallying the frequency of the behavior changes mentioned and then classifying them in “expect, like, and love to see” categories enabled teams to assess not just the most commonly adopted behaviors (e.g. fetching water and firewood), but also the degree to which workload-sharing changes are “transformative” or fall within the expected range of baseline gender norms.

#### *Working conditions and relations*

Whether in the formal or informal sector, attention to the quality of work and the quality of relationships is an important dimension to consider in gender-transformative programs. Cornwall et al. (2014) contend that formal work associated with their work for which they come to be valued—in women’s empowerment.” Qualitative inquiry can be used to track experiences of isolation, exploitation and stigmatization or dignity and positive identity associated with income earning (Cornwall 2014). Attention to the quality of men’s working conditions, identity and working relationships may be important, as gender norms and expectations may force men to accept exploitative working conditions and high-risk jobs (such as in capture fishing), particularly in the informal sector. For both men and women, relationships of solidarity, capacity to negotiate working conditions, and capacity to choose type of work may be indicators of transformative economic empowerment.

In some sectors, such as agricultural day labor, tracking the gendered wage-gap differential and collective mobilization around injustices may be relevant indicators. In CARE’s Pathways program in Bangladesh, advocating against the gendered wage discrimination in the agricultural day labor sector was an issue that united both women and men, as the benefits were evident to both. The advocacy challenged an entrenched normative logic: that wage differentials were justified due to differences in physical strength. The project tracked the gendered wage gap in both target and control villages; it found that wages for both men and women increased and the gendered wage gap decreased by 7.7% in the target villages. Qualitative analysis also found that the quality of women’s working conditions and relationships with male co-workers improved—they experienced more respectful treatment on the job site and gained the ability to take breaks (Eusuf and Khaleque 2014).

#### POTENTIAL PROCESSES

[Wage matrices](#). Participatory exercises that document terms and conditions for individuals in wage labor may offer a systematic and simple process to monitor conditions over time. This process involves group discussions that outline all tasks or steps involved in agricultural day labor or other economic exchanges. For each step, participants discuss who is involved (men, women, children) and the terms and conditions they face. This offers a gender-differentiated view of working conditions and relations, and may act as a tool for both organizing and monitoring change over time. Other tools used by CARE to explore working conditions and relations in a participatory way include [exploitation analysis](#), [network analysis](#) and [dependency mapping](#).

### 3.1.2 Control over assets

World Bank guidance suggests that “the relative value of assets owned by men and women is a stronger measure of gender disparities in opportunities and outcomes, and therefore perhaps a more telling indicator of women’s economic power in a given context” (Doss et al. 2008,16). The gendered gap in asset ownership and control is usually determined by survey, with response options including “sole,” “joint” and “someone else.” Asset ownership is often correlated with other measures of gender equality, including decision-making participation.

There are well-documented challenges around the concept of jointness.

For example, in CARE’s Pathways baseline survey, the inquiry into decision-making produced the greatest discrepancy between quantitative and qualitative findings. In Tanzania, for example, the quantitative findings showed that women have input into most decisions made in the household. Focus groups, however, revealed that both men and women generally viewed men as ultimate decision-makers on all household expenditures. This does not mean that women do not have some say in the matter, but qualitative findings were nearly unanimous in portraying men as having “supreme” or “ultimate” power in a number of important areas. Surveys often poorly capture the nature of the consultative process and the extent to which women’s “input” into decisions aligns with their influence over the final outcomes. There is likely to be wide variation among women regarding whether a joint decision constitutes a truly equal negotiation process or a consultative formality.

The type of asset in question may affect women’s level of participation in the decision-making: Typically men make the final decision with respect to large expenditures for a household, the selling of major assets (such as livestock) and the use of this income, while women have relatively greater control over the smaller expenditures and decisions. Moreover, an emphasis on measuring intrahousehold asset gaps alone can enforce an antagonistic understanding of men’s and women’s relations (versus cooperative relations) and may also favor a Western bias toward individual ownership and individual property rights as the basis of citizenship (versus shared resources). A gender analysis of an aquaculture project in Cambodia, for example, used a participatory rural appraisal tool and drawing exercise to discuss how assets were managed, how parties defined “joint” ownership, and the strategies women used to bargain over control and use of assets. The analysis found that sole control over productive assets was not the ideal for women; they valued instead a fair negotiation process with

their spouses and the ability to equally veto the sale or purchase of an asset (Hillenbrand et al. 2014).

Furthermore, one project analysis of the Gender, Agriculture, and Assets Project (GAAP) in Bangladesh illustrated that the relationship between women’s asset ownership and bargaining power is not always linear, nor can it be assumed. This project found that the transfer of goats to ultra-poor women did not improve their relative bargaining position; it in fact resulted in decreased decision-making involvement and decreased mobility. Qualitative insights, however, revealed that the intangible benefits that women gained as a result of the program included social capital, self-esteem and the social esteem associated with asset ownership (Quisumbing et al. 2013). It is therefore important to dismantle the nuanced relationship between mobility and social class. A truly transformative approach needs to pay attention to these factors so as not to perpetuate existing gendered and patriarchal norms restricting women’s mobility and its linkage with social status.

A combination of quantitative and qualitative inquiry may be useful to capture transformational dimensions of asset ownership, including (1) changes in social norms and rules around asset ownership, including the right to inherit and transfer to children and the value of assets appropriate for women to own (norms often allow women to own small assets, men to own larger assets); (2) equitable decision-making processes around asset use and sale; and (3) the subjective significance of asset ownership to individuals’ lives.

#### POTENTIAL PROCESSES

**Gap-tracking.** CARE Canada’s monitoring and evaluation guidance to the LINKAGES project proposes the indicator “proportion of women to men with access to those assets (physical, social, economic) that are key to resiliency” and provides guidance for tracking the gap between men and

**Table 3. Control over assets.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Self-esteem and social standing associated with asset ownership<sup>a</sup></li> <li>– Ability to claim the output and income produced by the asset<sup>b</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Proportion of women to men with access to those assets (physical, social, economic) that are key to resiliency<sup>c</sup></li> <li>– Equitable negotiation processes around asset use, purchase and sale<sup>d</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Gendered rules governing access to productive assets and markets<sup>e</sup></li> <li>– De facto rights to inherit or bequeath assets to others through sale, gift or inheritance<sup>b</sup></li> <li>– Access to and control over productive assets for different social groups<sup>e</sup></li> </ul>

Sources: <sup>a</sup>IFPRI 2008; <sup>b</sup>Quisumbing et al. 2013; <sup>c</sup>CARE Canada 2013; <sup>d</sup>Hillenbrand et al. 2014; <sup>e</sup>Alsop et al. 2006.

women over time (Table 4). The survey guidance notes that the definitions of “control” and “access” should be defined by the participants themselves, and it encourages probing around the meaning of jointness: “Probe interesting points. Why does the respondent want to claim that ‘both’ access or control? Why is it hard to choose? Are there certain circumstances under which men have more control and others under which women have more control over the asset?”

In addition, the guidance includes questions to be followed with qualitative inquiry and team reflection, such as “Did social rules and norms around access to and control over key resources change in the households and communities that the project was working in?” and “Did women’s control decrease in any way?”

To capture subjective meanings of asset ownership and how it relates to intrahousehold and individual changes, CARE’s Pathways program took digital photographs of the female adult within the household with (1) something she purchased with her own income for the household or a family member in the past 12 months and (2) something she bought for herself in the last 12 months. This provided a more subjective understanding

of assets and economic empowerment, and the process of documentation was also identified by some of the women as empowering (Kruger 2013).

### 3.1.3 Control over land

Women’s land rights have been associated with a number of gender equality outcomes, including greater bargaining power, decision-making influence, greater food security and productivity, children’s educational enrollment, reduced violence, and safer sex (Doss et al. 2008; Sweetman 2008; Hannay and Scalise 2014). The World Bank extensively documents best practices in land-ownership survey data, advising that accurate household-level gender analysis requires “individual-level data on land *access, ownership, titling and management* at the plot level and by sex” (Doss et al. 2008, 22). Individual property rights might have different effects than joint property rights, but the same analytical challenge of interpreting “jointness” applies to land ownership as to other asset ownership. There is significant disagreement among researchers as to whether joint or sole titling better serves women’s interests, and it may vary significantly from context to context. In India, for example, the rules regarding women’s land ownership have nominally changed during the past 5 years, and

**Table 4. LINKAGES indicators.**

Baseline data: Women in male-headed households				
Item	Access		Control	
	Women	Men	Women	Men
Oxen	30%	90%	10%	75%
Fertilizer	50%	90%	30%	90%

Source: Capelazo, 2012.

**Table 5. Control over land.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Land literacy; knowledge of and ability to redress rights</li> <li>– Women can make independent decisions on matters concerning exercise of land rights<sup>a</sup></li> <li>– Individual action to challenge discrimination in women’s access to resources (including land rights)<sup>b</sup></li> <li>– Sole land title</li> </ul>	<ul style="list-style-type: none"> <li>– Equitable household negotiation processes for use and control of quality land</li> <li>– Family members’ land literacy and knowledge of women’s land rights</li> <li>– Community mobilization for rights awareness, enforcement of rights<sup>c</sup></li> <li>– Erosion of tenure security (male takeover of women’s cropland)</li> <li>– Joint land title</li> </ul>	<ul style="list-style-type: none"> <li>– Land rights are:               <ul style="list-style-type: none"> <li>◦ legitimate (legally and socially recognized)</li> <li>◦ able to withstand changes in families and communities</li> <li>◦ long term</li> <li>◦ enforceable</li> </ul> </li> <li>– Exercising land rights does not require consultation or approval beyond what is asked of men<sup>a</sup></li> <li>– Gender norms surrounding control of land (regardless of ownership)</li> <li>– Attitudes toward women’s control over land</li> </ul>

Sources: <sup>a</sup>Hannay and Scalise 2014; <sup>b</sup>Mayoux 2000; <sup>c</sup>Malhotra et al. 2006.

women's names are now supposed to be included on revenue land deeds and forest land deeds. Women own more land jointly than individually. However, in practice there has been little actual change in gendered ownership and control patterns. Joint ownership of land may constrain women who wish to express their priorities on land use and limit women's use of alternative farming arrangements (Agarwal 2003; Doss et al. 2014).

The gendered nature of property rights (both individual and joint) as they relate to gendered social norms and institutions is highly context specific. An analysis of CARE Pathways baseline survey findings in four countries (India, Malawi, Mali and Tanzania) observed that in the African countries, property ownership contributed to women's increased decision-making power within the household—although this participation was found to be in the area of children's education and minor household expenditures. However, in India, women's individual land ownership was not correlated with women's input into any of the household decisions, major or minor (Doss et al. 2014).

Moreover, women's individual land ownership as an indicator of agency does not capture the structural and relational dimensions of land access and ownership. Even where progressive or gender-equitable laws exist, women's de facto ability to realize their rights and exercise control over land is determined by social norms, discriminatory institutions and local customs (Paydar 2012). The land-rights organization Landesa defines the bundle of rights that make up de facto tenure security as rights that have the following characteristics:

- legitimate (legally and socially recognized)
- able to withstand changes in families and communities
- long term
- enforceable
- do not require consultation or approval beyond what is asked of men.

Indicators capturing these five dimensions would need to be present to identify and measure meaningful change in the outcome of secure land tenure. Land ownership tenure systems are contextually different, and tracking changes over time in de facto tenure security (including attitudes and norms around land) requires initial contextual analysis through participatory rural appraisal, social mapping, secondary research or other primary research. The *Land Tenure Framework for Analysis: Land Rights* provides guidance for assessing relevant dimensions of land rights through primary or secondary research. This analysis can help determine the critical indicators (structural, relational and individual) and the attitudes to focus on (Scalise and Giovarelli 2013).

## POTENTIAL PROCESSES

**Survey module.** A paper presented by Landesa (Hannay and Scalise 2014) offers an annex of indicators to capture changes in land access and in each of the five dimensions of tenure security, which can be integrated into a baseline-endline survey.

**Participatory assessments.** Participatory community resource mapping and historical timelines can be used to assess and explore gendered access to and control over land (both collective and individual resources), and to identify the main challenges around equitable access to collective and individual property. Qualitative discussion can focus on the quality of land to which women have access, security of terms of use, knowledge and attitudes around women's land rights, and discrimination in the subjective value assigned to "productive" or cash-crop land and property versus "subsistence" or food-crop land uses. Monitoring should track erosion of women's land rights (male takeover of women's crops and land resources) and capture intersectional exclusions of class, caste and ethnicity.

## 3.2 Power over: Control over others

In addition to looking at power over from the positive sense of gaining control over resources and opportunities in one's life, we consider dominant power in its common negative connotation of meaning control over people. These meanings are obviously related, as "those who control resources and decisions have power over those without and exclude others from access and participation. When people are denied access to important resources like land, healthcare, and jobs, power over perpetuates inequality, injustice and poverty" (Miller et al. 2006, 7). A gender-transformative approach aspires to transform dominant power over to a more equitable process of power with. In this section, we consider key sets of indicators of dominant power—control over women's mobility and expressions of gender-based violence (control over others)—which often underlie the inequality in resource access and opportunities. Because intrahousehold decision-making is most often an exercise that is done (implicitly or explicitly) in relationship with others, we have included indicators around decision-making in the "power with" section.

### 3.2.1 Mobility

Women's mobility or ability to move freely is often measured as a dimension of economic empowerment because it relates to women's ability to directly access markets. The significance of mobility as an indicator of empowerment and gender equality depends on the specific cultural context and on class and caste. Questions and

response options need to be designed and interpreted in that context. The social norm of mobility can change rapidly in response to economic opportunities—in both directions (Ibrahim and Alkire 2007). Class and religion are significant factors in women’s mobility in Bangladesh, for example, where the practice of *purdah* is common. Yet compared to women from less-destitute households, so-called “ultra-poor” women have greater freedom of movement to participate in economic activities outside the home than women from higher classes who maintain *purdah* practices more strictly (Williams 2005). A GAAP research project in Bangladesh found that asset transfer (of goats) to extreme-poor women resulted in a voluntary shift among these women to more restricted mobility, as the financial ease allowed them to practice *purdah*. The women themselves considered their more limited movements to be an indicator of greater social standing, respect and self-esteem (Quisumbing et al. 2013). It is therefore important to dismantle the nuanced relationship between mobility and social class so as not to perpetuate existing gendered and patriarchal norms that restrict women’s mobility and its linkage with social status.

Response options on mobility surveys may also need to be contextualized with qualitative inquiry to interpret the meaning of “permission,” which in some instances may be considered a courtesy or formality, a gesture of respect to one’s husband rather than a lever of control. A more transformative indicator may be the reciprocity of both men and women applying this courtesy. In the Pathways mid-term evaluation, which used outcome mapping to harvest indicators of gender behavior change, a significant

indicator related to mobility was “men informing wives of their movements,” a practice that was described as indicative of mutual respect and more respectful relationships (CARE 2014a).

Often, the very real risks related to women’s safety and exposure to harassment are used to justify curtailing women’s mobility, maintaining men (occasionally even very young boys) in the patriarchal role of “protector.” A gender-transformative approach also looks at the male behaviors and attitudes that contribute to this perceived need for women’s protection, and tracks community-level or intergenerational shifts in the repercussions for men and boys of publicly harassing girls and women.

#### POTENTIAL PROCESSES

**Mobility maps.** IFAD’s toolkit provides examples of participatory tools for mapping women’s and men’s spheres of mobility specifically in relation to market access. The tool illustrates the different modes of transport required and prices found at different markets (IFAD 2002). Participatory rural appraisal community maps can be used to identify male- and female-exclusive spaces and restrictions on women’s movements both within and outside of the community; these tools can be useful for revealing intersectional differences based on caste, religion, age and class. To make these tools gender-transformative, lines of inquiry would need to explore the norms and customary practices behind specific gender barriers based on movement, and to challenge these within programming.

**Table 6. Mobility and gender-based violence.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Ability to go out alone; freedom of movement<sup>a</sup></li> <li>– Individual action taken to challenge and change cultural perceptions of women’s mobility at household level<sup>b</sup></li> <li>– Women’s ability to visit friends, family and associates<sup>c</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Men inform wives about their movements<sup>d</sup></li> <li>– Joint action to challenge and change cultural perceptions of women’s rights at community level</li> <li>– Respectful attitudes and practices of male children toward girls (discouraged from harassing)</li> <li>– Women’s exposure to coercive controls<sup>e</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Mobility of women within and outside their residential locality, as compared to men<sup>f</sup></li> <li>– Attitudes toward women’s freedom of movement</li> <li>– Rates of abuse, assault and harassment against women in public spaces<sup>c</sup></li> </ul>
<p>Sources: <sup>a</sup>Alsop et al. 2006; <sup>b</sup>Mayoux 2000; <sup>c</sup>Golla et al. 2011; <sup>d</sup>CARE Pathways; <sup>e</sup>Mason and Smith <i>in</i> Alsop and Heinsohn 2005; <sup>f</sup>CIDA 1997 <i>in</i> Ibrahim and Alkire 2007.</p>		

### 3.2.2 Gender-based violence

As discussed in Chapter 2, the literature suggests that gender-based violence is an extremely pertinent issue to be monitored and mitigated in ethical ways. The most common relational indicators for gender-based violence are reported prevalence of violence and relational dynamics across women's, men's, boys' and girls' experiences. To begin to understand dynamics of gender-based violence within a context, a survey of secondary data can offer insights in relation to domestic and intimate partner violence, gender-based violence beyond the household, early and forced marriage, female genital cutting, and infanticide. Cultural sensitivity and taboos surrounding gender-based violence, fear of reprisals, and stigma and shame, as well as perceptions that this behavior is normal, can act as strong deterrents against discussing or reporting gender-based violence. As such, analysis has shown that gender-based violence remains underreported and poorly understood, particularly among children, male and LGBTQ+ survivors (Bloom 2008). When asking direct questions related to gender-based violence, programs should consider ethical protocols, referral systems and well-trained enumerators (Bloom et al. 2014). Measures can be situated in a broader understanding of community contexts and motivations (Batliwala 2006). In the context of agricultural programs, the literature suggests that unless all the ethical guidelines provided by the WHO can be followed, direct questions about gender-based violence in order to establish prevalence indicators are not advisable.

For agricultural and women's economic empowerment programs that are seeking to integrate gender-transformative approaches, in the absence of all the ethical considerations needed to ask about direct experiences, indicators linked to the primary prevention of gender-based violence are more appropriate to track (Batliwala 2006).

Analysis has shown that monitoring gender-based violence requires an understanding across perceptions, beliefs and actions among individuals, as well as people's perceptions of community norms. At the same time, monitoring can require an understanding of institutional commitments related to gender-based violence alongside their implementation, budgets and accountability. For example, the Violence Against Women Compendium of indicators includes various measures in relation to education regarding predominant expectations around sexual abuse and violence, steps taken to ensure violence-free environments, and how to respond effectively and sensitively to violence cases. As indicated by the literature, this is important for all sectors in order to guard against

issues of sexual exploitation and abuse, as well as threats of violence that may inhibit or shape access to services and benefits from development interventions (Bloom 2008).

#### POTENTIAL PROCESSES

**Anonymous incident tracking sheet.** In the context of agricultural programming, community-based staff or volunteers may use a simple tracking sheet to record incidences of gender-based violence within communities that they become aware of indirectly or that are directly shared with them or witnessed by them in the course of regular program activities. An example of this system is being piloted by the Center for Domestic Violence Prevention, a Ugandan NGO that works in close collaboration with Raising Voices. This form does not include any identifying information with regard to the survivor and also includes referrals offered in relation to each case (Bloom et al. 2014).

#### **Community attitudes, skills and behaviors tracking tool.**

Raising Voices also developed the [basic outcome tracking tool](#) for staff and participants to assess knowledge, attitudes, skills and behaviors in relation to gender-based violence over time. For each category, staff rank community agreement or disagreement in relation to a set of statements following community dialogues. This gives a sense of what is changing over time based on staff assessments and observation. These measures are open ended and are not descriptive of knowledge, attitudes, skills and behaviors related to gender-based violence within communities.

**Survey.** Promundo and ICRW have also undertaken research with a focus on knowledge, attitudes, skills and behaviors through IMAGES. This survey has now been administered across six countries and probes into a range of issues related to employment, education, childhood experiences of violence and gender attitudes, household relations, parenting, attitudes toward women and masculinity, health and quality of life, partner relations, transactional sex and sexual violence, intimate partner violence, and sexual behaviors. While more comprehensive than the Raising Voices outcome tracking tool, the analytical report discussed limitations related to respondent fatigue, refusals to participate and potential issues with validity in relation to self-reported data (Barker et al. 2011). Further, IMAGES only assessed men's experiences and views as perpetrators of sexual violence (and women's experiences as survivors of violence), offering little in terms of male survivors of gender-based violence.



**Table 7. Gender-based violence.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>- Perceptions of and attitudes toward intimate partner violence, abuse, harmful traditional practices, corporal punishment and community violence<sup>a</sup></li> <li>- Perceptions in relation to masculinity, sexuality, homophobia and equal rights across gender<sup>a</sup></li> </ul>	<ul style="list-style-type: none"> <li>- Decrease in controlling behavior (see indicators related to mobility and public spaces)<sup>b</sup></li> <li>- Increasing negotiation within intimate relationships and sexual relations<sup>b</sup></li> <li>- Freedom from threat of violence from partner and within community</li> </ul>	<ul style="list-style-type: none"> <li>- Tolerance and acceptability of violence on the basis of gender<sup>b</sup></li> <li>- Views on community attitudes around the following:               <ul style="list-style-type: none"> <li>o intimate partner violence and abuse</li> <li>o harmful traditional practices</li> <li>o nonhousehold gender-based violence</li> <li>o survivors and perpetrators of violence</li> <li>o linkages and availability of gender-based violence prevention initiatives and actors<sup>b</sup></li> </ul> </li> <li>- Gender-based violence-sensitive employment policies among employers<sup>c</sup></li> <li>- Mechanisms to prevent and respond to gender-based violence within key institutions (markets, services and educational spaces):               <ul style="list-style-type: none"> <li>o infrastructure</li> <li>o mitigation and response systems<sup>b</sup></li> </ul> </li> </ul>

Sources: <sup>a</sup>Barker et al. 2011; <sup>b</sup>Bloom 2008; <sup>c</sup>USAID n.d.

### 3.2.3 Control over the agenda

One dimension of control is described as “hidden power,” which may not be overtly exercised by formal decision-makers but is seen in the way that influential voices shape the political or development agenda to the exclusion or marginalization of other groups. The power over naming and framing political agendas, deciding what issues are important and whose viewpoints are legitimate, is a form of hidden power. The way that an issue is framed (for instance, feminism as a Western construct that destroys families) can illustrate the hidden power of influential actors, and it also distracts from and suppresses legitimate debate about underlying challenges and inequalities (Miller et al. 2006). Giving primacy to women’s involvement in political processes is essential to gaining control over structures that set the agenda and can enable empowering changes at the individual level (Rowlands 1997). Women can exert their power within in a forceful way if they are politically protected (Friedmann 1992). Empowerment through political change is just as relevant in the sphere of development and social decision-making as it is in formal politics. In practical terms, this means organizing women to take “control of their own lives, to set their own agendas, to organize to help each other and make demands

on the state for support and on society itself for change” (Friedmann 1992, 32–34).

Quotas and sex-disaggregated data on leadership, as well as gender-budget analysis, are used to track the control of women and marginalized groups over the national political agenda and policies. Hidden power, however, can still undermine formal representation. Gender stereotypes have been shown to directly impact voting behavior, as voters attribute certain leadership traits that are both negative and positive to candidates based on their gender (Sanbonmatsu 2002; Dolan 2004; Sanbonmatsu and Dolan 2009). The division of roles traditionally portrays men as political agents and women as being under their protection. Women’s contributions to society have often not been valued and their concerns have been kept outside the realms of public decision-making and public debate.

Social norms and values can have a strong influence on equal political representation but are often overlooked within monitoring, evaluation and learning systems (Batliwala and Pittman 2010). As described in Chapter 2, social network analysis is a useful qualitative tool for

assessing which groups have greater voice over a given set of issues and which voices are marginalized. Mapping can be useful for tracking the spread of behavior and attitudinal changes within a community, as well as the greater inclusion of certain groups. Other measures of shifting control over the agenda may include women's internal awareness of public decision-making processes and aspirations to be involved. It can be reflected through women's versus men's political leadership across key institutions (including extension services and markets), their degree of influence into broader community development priorities and resourcing, and community perceptions of women's capabilities and of women who speak out in public.

While the specific indicators are context-specific, impact measures of greater inclusion of women would look at specific policy achievements. For example, at the village *panchayat* level in India, quotas for women and scheduled castes have been observed to change political incentives in favor of the interests of the group that is favored by the quota by weakening prevailing stereotypes and shifting social norms (Mansuri and Rao 2013). Some measures of the effects of this policy change included greater allocations to infrastructure and other services addressing women's and children's needs, increased reporting of crimes against women, and more arrests for such crimes (World Bank 2012). Similarly, the evaluation of the Community-Based Education Project (Proyecto Hondureño de Educación Comunitaria) in Honduras evaluated the extent to which women were represented in the school council and decision-making; it also compared the effectiveness of more inclusive school councils with the less-diverse school councils of the traditional system run by the government (Alsop and Heinson 2005).

## POTENTIAL PROCESSES

**Gender gap studies.** The gender gap analysis undertaken by CARE Democratic Republic of the Congo's community-driven governance project held single-gender discussions with groups of women, men, adolescent boys and adolescent girls to understand the support, barriers and dynamics shaping each group's (1) knowledge and information regarding the intervention; (2) participation in the intervention; (3) voicing of positions and influencing strategies; and (4) engagement in decision-making processes. This exercise also explored each group's perceptions of which groups dominated the project decision-making and benefits, supportive or opposing pressures that influenced people's ability to engage with the project at both household and community levels, and how different groups experienced change from engagement in the project. This gives a sense of the competing pressures different groups may face, and how time and labor, social norms and community relations, and household relational dynamics interact with individuals' participation in and benefits from public processes (Wu et al. 2013).

**Appreciative inquiry.** CARE Burundi has also integrated regular appreciative inquiry discussions with solidarity groups to discover the groups' experiences of strength, power and achievement through reflection around a targeted question. One example of a question may be for the group to describe a time when it overcame a significant challenge to achieve something remarkable. Through the conversation, facilitators aim to understand the strengths, success elements and details surrounding the story as well as how participants experienced the incident. This process aims to identify the values and factors underlying the success. Following this phase,

**Table 8. Control over the agenda.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Awareness of main local public service decision-makers<sup>a</sup></li> <li>– Aspirations to be more or less involved in community decision-making processes<sup>a</sup></li> <li>– Willingness to be involved in communal decision-making<sup>b</sup></li> <li>– Comfort with speaking out in public</li> </ul>	<ul style="list-style-type: none"> <li>– Support networks among female officials, entrepreneurs, leaders, etc.</li> <li>– Score of influence in community decision-making processes<sup>b</sup></li> <li>– Increased rate of participation in community organizations<sup>c</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Representation of women among service providers and traditionally male-dominated committees (e.g. extension services)</li> <li>– Perceptions of women's capabilities in public positions or decisions</li> <li>– Acceptance of women's public speaking</li> <li>– Greater participation in the political processes of the community in situations where they were previously disenfranchised<sup>d</sup></li> </ul>

Sources: <sup>a</sup>Holland and Brook 2004; <sup>b</sup>Alsop and Heinson 2005; <sup>c</sup>Rottach et al. 2009; <sup>d</sup>Moser 2007.

discussants ask participants to dream about their own future, and what they would like to achieve next based on the skills and strengths they have developed. This process offers teams an opportunity to look across stories to identify elements of success, strength and power, and aspirations across project groups. These may be monitored over time to examine shifting themes and achievements over the course of a project (Ashford and Patkar 2001).

**Message monitoring.** In CARE Nepal, advocacy networks mobilized around a number of key legislative issues to promote gender equality and women's rights. Working with the Inter-Parliamentary Women's Association, the initiative raised gender equality and women's rights issues with legislators through organized field visits and written demands for consideration in the drafting of the national constitution. To monitor the impact of this work, the project analyzed subsequent concept papers put forth by political parties and elected representatives to examine how public positions reflected the language of advocacy efforts (Podems 2010). Other techniques such as media tracking, focus group discussions, policy tracking, meeting documentation and quote logs may also be useful to monitor how political agendas are being shaped through advocacy and mobilization efforts. The International NGO Training and Research Centre (INTRAC) offers a useful resource that [outlines further advocacy monitoring methods](#).

### 3.3 Power to

"Power to" has been described as "the unique potential of every person to shape his or her life and world" (Miller et al. 2006). This section includes indicators of transformative capabilities and abilities, including the following:

- knowledge and skills
- awareness and conscientization
- nutrition, health and bodily integrity.

#### 3.3.1 Knowledge and skills

In the agriculture sector, knowledge indicators and skills often closely reflect the specific program inputs, such as farm management, accounting knowledge and managerial control of a loan. Measuring the gap between men's and women's achievements in these areas is relevant, as is sex-disaggregated data on access to extension information and the extent of training or networking among local women as compared to men (CIDA 1997 in Ibrahim and Alkire 2007). However, gender-transformative measurement may extend beyond livelihoods-specific knowledge and skills to other inherently transformative life skills such as communication and negotiation skills and literacy. In several qualitative mid-term evaluations

of a CARE agriculture program, literacy was cited by women as an essential component of empowerment (CARE 2014a; TANGO 2014). The Freirian Reflect approach to collective empowerment initially placed literacy at its core, but expands this concept to consider "enhanced communication" (whether it be literacy, learning a dominant language, accessing a new technology or information sources, or learning to assert one's voice in areas that were previously off-limits), all of which support the political processes of critical thinking and taking social action (Archer and Goreth 2004). "Softer" skills such as assertive communication and capacity to negotiate (Ibrahim and Alkire 2007) are mentioned in other sections of this report, but are essential ingredients for leveling the playing field in intrahousehold and community levels and in market negotiations.

#### 3.3.2 Awareness and conscientization

Along with narrowing the gaps in women's skills and knowledge, gender-transformative indicators should include the more political dimensions of both men's and women's awareness of legal and social rights, which can be a first step toward both individual and collective action. This may include not just awareness of women's rights but also women's internal belief that they are entitled to them, and family members' recognition of these rights. At the structural level, these individual and household indicators may be complemented by the extent to which the laws and leaders support women's rights and access to resources, the judicial system is used to redress violations, and there is "systemic acceptance of women's entitlement and inclusion" (Malhotra et al. 2002, 49). Investments in children's education are very often an outcome of livelihoods programming. It is important to capture the intergenerational effects of gender-transformative work, including whether there are greater commitments to girls' education, and whether men increase their financial contributions to healthcare and education.

#### 3.3.3 Nutrition and health outcomes

Nutrition and health are usually measured as results of livelihoods programming, but health and nutrition as capabilities have gendered dimensions that are rooted in social norms and inequitable structures (IFPRI 2020). Women's and children's dietary diversity as compared to that of other household members is an indicator of more equitable distribution of food and nutrition resources within the household. Gender-transformative approaches also challenge the cultural norms that tend to allocate accountability for caregiving and health to women. Norms around masculinity also tend to discourage men's health-seeking practices, and health services may be

illequipped or poorly set up to accommodate men. Useful gender-transformative indicators track men’s health and nutrition knowledge (as compared to women’s in the same household), their greater investment in caregiving practices and expenditures, and their own health-seeking practices (for themselves or accompanying other family members). Two of the modules in the IMAGES GEM scale relate to shifting masculinity around men who (1) seek to be involved fathers and (2) assume some responsibility for reproductive health and disease prevention issues (Barker 2000).

The Gender Attitudes and Practices Survey (GAPS) of the Nobo Jibon food security project in Bangladesh assessed nutrition knowledge for women, men and mothers-in-law within the same household. Tracking the gap in men’s caregiving and nutrition knowledge was intended to encourage program attention to men’s involvement and to increase the likelihood of appropriate practices being adopted within the household. Along with the knowledge indicators, the survey tracked men’s caregiving and household support practices, specifically during pregnancy and exclusive breastfeeding periods (HKI and Save 2010).

### 3.3.4 Bodily integrity

The ability to control one’s own body, sexuality, fertility, and when and whether to have sex or children is a core dimension of women’s empowerment in CARE’s *Good Practices* gender analysis guide. While seemingly unrelated to livelihoods programming, it may be indicative of a fundamental power shift at the interpersonal and

intrahousehold level. Greater awareness of women’s rights and investments in communication skills may result in improved negotiations at this fundamental level. CARE’s WE-MEASR guidance offers a tested scale of indicators for capturing women’s “self-efficacy to refuse sex” and “self- efficacy to discuss and use family planning” at the individual level (CARE USA 2013). Norms and attitudes around sexuality govern and often constrain the choices that women make, from their mobility, their choice of occupation and what streets they consider safe to what interactions are permissible in the marketplace. IMAGES identifies “gender-equitable men” as those who seek relationships with women based on equality and intimacy rather than sexual conquest. One module of the GEM scale includes a set of questions to assess men’s recognition of women’s sexual agency (Barker et al. 2011).

While sexuality and intimacy are often viewed in a negative light through the lens of men’s control over women’s bodies, sexuality is a meaningful part of lived experience. Using open-ended and qualitative evaluation processes allows participants to define positive indicators of change related to sexuality and intimacy. In a recent qualitative evaluation of the Pathways program by CARE, for example, women and men alike noted that improvements in communication skills had translated into fewer extramarital affairs, improved quality of sexual relations, and spending more quality time together. Male respondents described the benefit of increased intimacy as one of the key factors encouraging their broader support for women’s engagement in the program (CARE 2014b).

**Table 9. Knowledge, awareness and conscientization.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Knowledge of cultural, legal and political processes<sup>a</sup></li> <li>– Assertive communication</li> <li>– Capacity to negotiate (in markets)<sup>b</sup></li> <li>– Women’s literacy and access to a broad range of educational options<sup>c</sup></li> <li>– Individual action to challenge and change perceptions of women’s rights and capacities<sup>a</sup></li> <li>– Women’s awareness of their rights and practice of these rights<sup>c</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Commitment to educating daughters<sup>c</sup></li> <li>– Domestic support for women exercising rights<sup>c</sup></li> <li>– Collective awareness of injustice</li> <li>– Reduced gaps in men’s and women’s livelihoods and entrepreneurial and business skills</li> </ul>	<ul style="list-style-type: none"> <li>– Sex differences in access to information and services (such as extension)</li> <li>– Extent of training or networking among local women, as compared to men<sup>d</sup></li> <li>– Removal of barriers to accessing cultural, legal and political processes<sup>a</sup></li> <li>– Systemic acceptance of women’s entitlement and inclusion<sup>c</sup></li> </ul>
Sources: <sup>a</sup> Mayoux 2000; <sup>b</sup> Alsop and Heinson 2005; <sup>c</sup> Malhotra et al. 2002; <sup>d</sup> CIDA 1997 in Ibrahim and Alkire 2007.		

NO.	QUESTIONS AND FILTERS	CODING CATEGORIES	
M401	During your wife's pregnancy, did you do anything to reduce your wife's workload?	Yes ..... No .....	2→M403
M402	If so, what did you do (cooking, washing, bathing children, fetching water, childcare)? (Multiple response)	Cooking ..... Washing ..... Bathing children ..... Fetching water ..... Childcare ..... Other .....	
M403	During your wife's pregnancy, did you offer her more or different foods?	Yes ..... No .....	
M404	During your wife's pregnancy, did you ask any other family members to help your wife with household work?	Yes ..... No .....	
M405	In the months after your wife gave birth, did you do anything to reduce your wife's workload to make breastfeeding easier for her?	Yes ..... No .....	2→M407
M406	If so, what did you do (cooking, washing, bathing children, fetching water, childcare)?	Cooking ..... Washing ..... Bathing children ..... Fetching water ..... Childcare ..... Other .....	
M407	In the months after your wife's delivery, did you offer your wife more foods?	Yes ..... No .....	
M408	In the months after your wife gave birth, did you ask any other family members to help your wife with household work?	Yes ..... No .....	
M409	How soon after delivery do you expect your wife to return to her regular household work?	Weeks ..... Months ..... When she feels ready ..... Immediately .....	
M410	In the last week, did you hold your child until it slept (put the child to bed) at least once?	Yes ..... No .....	
M411	In the last week, did you ever feed the child?	Yes ..... No .....	
M412	Have you ever taken your child to the vaccination center?	Yes ..... No .....	
M413	Have you ever taken your wife for Antenatal care visit?	Yes ..... No .....	

**Figure 5. Example of Nobo Jibon GAPS survey of men's caregiving and household support practices during pregnancy and breastfeeding.**

### 3.4 Power within: Internal and psychological resources

“Power within” has to do with a person’s self-worth and self-knowledge and is often measured at the individual level, in terms of women’s increased self-confidence and self- efficacy or problem-solving capacity.

In this section, we look at indicators related to the following:

- self-efficacy, self-esteem and self-confidence
- aspirations
- internal beliefs.

“Power within is the capacity to imagine and have hope; it affirms the shared human search for dignity and fulfillment and is strengthened by an understanding of power and the common good, and a constant practice of questioning and challenging assumptions. Spirituality, story telling, music, dancing and critical reflection can affirm people’s power within which can serve as a nourishing force energizing the tireless efforts of social justice activists. Effective grassroots organizing efforts use such methods to help people affirm personal worth, tap into their dreams and hope, and recognize their power to and power with” (Miller et al. 2006).

Ibrahim and Alkire (2007) describe power within as the “ability to induce change in one’s life, thus inducing self-acceptance.” In proposing internationally comparative indicators, they offer a question encapsulating three dimensions: aspects the person wants to change, willingness to change, and ability to contribute to change (Figure 6).

Malhotra et al. (2002) classify this dimension of power as a psychological asset, using indicators such as self-esteem, self-efficacy and psychological well-being; collective

awareness; and women’s sense of inclusion and entitlement. Self-efficacy is administered as an individual measure, referring to “what individuals believe about themselves, and what they are able to do, rather than what their actual capacities are.” As mentioned above, CARE’s WE-MEASR indices include measures of self-efficacy around specific health domains. A draft CSISA questionnaire developed for AAS follows the standardized index of “I” statements to capture confidence to solve problems. While standardized self-efficacy measures are appealing and have been tested in multiple contexts, measuring self-efficacy and individual self-confidence alone may be challenging to translate and may miss some of the critical relational dimensions of self- efficacy and self-confidence: “People’s sense of self- efficacy is derived from how they interpret their success, from observing others who they see as models of behaviour, and from the social persuasion, or feedback, they get from others. The contextual or environmental factors are critical to an individual’s sense of self-efficacy, [though they] do not entirely condition it” (We Can Campaign 2011). Indicators of social and relational dimensions at household and community levels are fundamentally complementary to individual indicators of self-efficacy and self-confidence, and may include women’s sense of inclusion and entitlement, collective awareness of injustice, and systemic acceptance of women’s entitlement (Mayoux 2002 in Ibrahim and Alkire 2007). Other indicators may include perceptions about about group accomplishments and perceived knowledge and skills development (McMillan et al. 1995 in Ibrahim and Alkire 2007).

Power within also relates to women’s, men’s, girls’ and boys’ own aspirations, which are included as a core area of inquiry in CARE’s *Good Practices* guidance note for gender analysis. Aspirations may not fall into the framework of standardized outcome indicators, and aspirations may evolve as their own social relations, opportunity structures and resources expand. Expanding aspirations

**BOX IV – Indicator of changing aspects in ones’s life**

Q1. - Would you like to change anything in your life? Yes [1] No [0]

Q2. - What three thing(s) would you most like to change?

A:
B:
C:

Q3. - Who do you think will contribute most to any change in your own life?  
*[Enumerator. list up to 2 reasons]*  
 Myself [1] My family [2] Our group [3] Our community [4] Local government  
 [5] State government [6] Other (specify) \_\_\_\_\_

Source: (R.Alsop et al., 2006)

**Figure 6. Example of indicator of change.**

**Table 10. Nutrition, health and bodily integrity.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Ability to make childbearing decisions, use contraception and access abortion</li> <li>– Self-efficacy to refuse sex<sup>a</sup></li> <li>– Self-efficacy to discuss and use family planning<sup>a</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Dietary diversity of women and children under 5 in relation to men in the household</li> <li>– Men’s knowledge and accountability for health and nutrition outcomes<sup>b</sup></li> <li>– Couples’ communication around health, sexuality and reproductive decisions<sup>a</sup></li> <li>– Share of men’s and women’s expenditures in healthcare, education and children’s expenses</li> <li>– Greater intimacy; improvements in couples’ relations<sup>c</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Gender-equitable attitudes toward women’s sexual agency; men’s involvement in reproductive decisions; engaged fatherhood<sup>d</sup></li> <li>– Reduced son preference in health and feeding</li> <li>– Accessible and quality public health services</li> <li>– Men’s health-seeking behaviors</li> </ul>

Sources: <sup>a</sup>CARE USA 2013; <sup>b</sup>HKI and Save 2010; <sup>c</sup>CARE, personal communication; <sup>d</sup>Barker et al. 2011.

**Table 11. Self-efficacy, aspirations and internal beliefs.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Self-esteem, self-efficacy and psychological well-being<sup>a</sup></li> <li>– Assertiveness and autonomy<sup>b</sup></li> <li>– Willingness and capacity to contribute to change<sup>c</sup></li> <li>– Self-perceived inclusion or exclusion<sup>d</sup></li> <li>– Expanded aspirations; capacity to aspire<sup>e</sup></li> <li>– Appreciation in household; sense of self-worth<sup>a</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Supportive household relations; domestic support for exercising rights<sup>a</sup></li> <li>– Having sources of inspiration and support, role models, and peers<sup>f</sup></li> <li>– Collective awareness of injustice and potential for mobilization<sup>a</sup></li> <li>– Perceived ability to change things collectively in the community</li> </ul>	<ul style="list-style-type: none"> <li>– Recognition of need to challenge gender subordination, including cultural tradition, legal discrimination and political exclusion<sup>b</sup></li> <li>– Level of interaction and sociability with people from different social groups<sup>d</sup></li> <li>– Systemic acceptance of women’s entitlement and inclusion</li> <li>– Perceived group accomplishments<sup>d</sup></li> </ul>

Sources: <sup>a</sup>Malhotra et al. 2002; <sup>b</sup>Mayoux 2000; <sup>c</sup>Ibrahim and Alkire 2007; <sup>d</sup>Alsop and Heinson 2005; <sup>e</sup>Cornwall 2014; <sup>f</sup>We Can Campaign 2011.

and visions of the future can be revealing indicators of an enabling environment or of personal self-confidence. Cornwall et al. (2014) emphasize that women’s capacity to transform and exercise control over their lives is determined in part by their social environment: “Despite marginal increases in spending power, women may find themselves unable to envisage the kinds of changes that could bring them greater empowerment, because prevailing social norms and limiting self-beliefs conspire to restrict their ability to re-imagine the horizons of the possible” (17). They may be captured in indicators around gender-equitable attitudes at the community level, supportive household relations, existence of positive role models, or affirmation or recognition of one’s views at community level.

In social change processes that are admittedly ambitious and long-term in scope, surveying internal beliefs can

be critical programming information. However, sets of attitudes may not be inherently coherent or necessarily in concert with a person’s actions; the theory of cognitive dissonance suggests that “attitudes tend to be much harder and slower to shift than behavior” (We Can Campaign 2011, 24), and therefore attitudinal surveys may not capture the full extent to which microbehavior changes are emerging. Using qualitative methods that capture the nuanced changes in both actions and attitudes may be necessary to complete the picture of how and in what ways social norms are shifting. The We Can Campaign, a grassroots movement to transform social norms around gender-based violence, conducted an extensive qualitative evaluation to elucidate where people are in the stages of attitudinal and behavior change, as well as what factors influenced social change. Sticking with the stages of the behavioral change model, the campaign contends that even the contemplation of

change is worth counting: “Anyone can choose to change, and every change, however small, is of equal value. An internal change, the contemplation of something different, may not emerge into action for a long time, or not at all: nonetheless, the Campaign’s vision of change holds that these internal shifts in consciousness all add up, to contribute to its overall aim” (We Can Campaign 2011, 28).

#### POTENTIAL PROCESSES

**Indicators of well-being.** Given the subjective, context-specific and inter-relational nature of psychosocial well-being, ethnographic and qualitative methods may be needed to develop appropriate measures and indicators. Bragin et al. (2014) use participatory and ethnographic methods to define subjective indicators of psychosocial well-being across three diverse conflict-affected settings: Burundi, Nepal and Uganda. The approach follows five steps:

- 1) concept identification, or working with participants to help identify and frame the concept of “psychosocial well-being” in context
- 2) clarifying the concept through semistructured interviews and focus group discussions
- 3) working with the interview team to develop consensus on the concepts
- 4) validating the concept through focus group discussions and structured interviews
- 5) developing the interview guide for the research.

Analysis across the three settings enabled researchers to identify domains that were common to all three countries, those that were common to two of the countries, and

those that were unique to a particular country (Figure 7). Interestingly, the domains that were common across all three countries map closely to the indicators of empowerment commonly used by development organizations: education; access to resources; love within the family; friendship and support outside the family; and voice at home, in the community and beyond. However, the process also helped put specific indicators to intangible values such as “moments of joy” (“to be able to see my children healthy, to laugh with them and play”; “to be able to laugh with husband”) and map the correlations between the different dimensions of well-being (Bragin et al. 2014).

### 3.5 Power with

Many livelihoods interventions leverage the collective power (“power with”) of women’s groups for accessing markets and resources, or for the accumulation of social capital, which is considered a livelihood resource (Hickey et al. 2004). A gender-transformative approach extends the focus to the important processes of conscientization, solidarity and collective action, tracking not only groups’ livelihoods achievements but also their linkages to other social movements and actions taken to claim rights (Cornwall 2014). The literature also highlights the importance of less tangible dimensions of the quality of relationships (with peers, family members, co-workers and community members) as they relate to individuals’ self-esteem, quality of life and ability to take action in their own interests. In an important sense, power with is an outcome of gender-transformative work, which aims to convert relationships of unequal power to those of collaboration, respect, solidarity and shared goals.

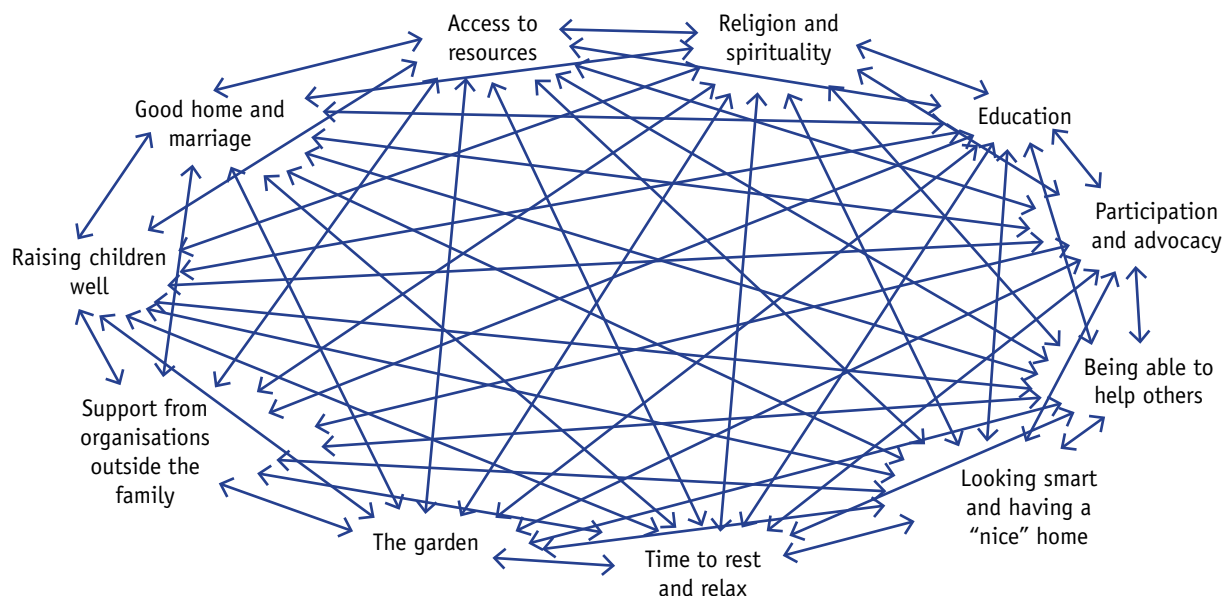


Figure 7. Example map of indicators of psychosocial well-being in Northern Uganda; Bragin et al. 2014.



In this section, indicators cover the following domains:

- collective action and group strength
- social capital and solidarity
- household decision-making.

### 3.5.1 Collective action and group strength

The relevance of collective action in the agriculture sector has been highlighted in research confirming evidence that, under the right conditions, women farmers can benefit from working collectively, and especially can reduce the risks of their engagement with new, often more distant markets (Penrose-Buckley 2007; Baden 2013; Buvinic et al. 2013). Measurement on the impact of collective action often focuses on the gender breakdown of group membership, the percentage of women in leadership positions, and enhanced access to livelihoods resources, economic opportunities and community leadership positions.

Research has also shown that the quality and governance of collectives matter if they are to support gender-transformative change and women’s meaningful participation. Factors such as having a structured space to reflect on gender and power, group dynamics, the interaction between group leaders and group members, etc., can determine the effectiveness and inclusiveness of the collective (Klouda 2007; Evans and Nambiar 2013). Even among singlesex groups, social differences such as class, caste and education level can create exclusionary dynamics and lack of trust, which can inhibit effective social action. Group trust, solidarity and inclusiveness may be important factors to track. Indicators of effective leadership in

groups may include tracking the extent of ongoing support and training to leaders (membership), the effectiveness of leaders, and the accumulation of technical capacities (budgeting, record-keeping, etc.) that are essential to group effectiveness.

Given the multivariate forms of groups and the dynamic processes through which collectives shape outcomes at household, market and community levels, qualitative inquiry is critical to complement standard data on group participation and achievements. In addition to measuring their livelihood achievements, a transformative approach notes the evolving and increasingly politically aware actions of groups. As Evans and Nambiar (2013) suggest, collective actions initiated to address a context-specific issue have the potential to mobilize women to voice and address greater concerns, including societal norms. As the impact and focus of mobilizing may shift over time, measurement systems require the agility to remain relevant in monitoring actions and outcomes. For example, the Self Employed Women’s Association in Ahmedabad, India, began seeking norm changes in one domain (protesting against discriminatory labor standards), which led to collective action in other domains, such as demands for political representation, laws on domestic violence and affirmative action (Evans and Nambiar 2013).

Likewise, CARE’s Pathways qualitative mid-term evaluation found that, although the Pathways intervention mobilized groups primarily for agriculture and economic improvements, an important and unanticipated indicator of change was the mobilization of women’s groups to directly intervene in households where gender-based

**Table 12. Collective action and group strength.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Women’s perception that their interests are represented<sup>d</sup></li> <li>– Perceived group accomplishments and future expected accomplishments<sup>a</sup></li> <li>– Taking joint action to defend other women against abuse<sup>b</sup></li> <li>– Expansion of group ambitions; actions initiated by groups<sup>c</sup></li> <li>– Political participation (protests, campaigning)<sup>b</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Group cohesion, trust and inclusivity</li> <li>– Diversity of representation and leadership</li> <li>– Effectiveness of group leadership<sup>d</sup></li> <li>– Role for weaker members in decision-making<sup>c</sup></li> <li>– Collective governance and group maturity scores (CARE participatory performance tracker)</li> <li>– Evolution of group rules and law</li> <li>– Political-social empowerment</li> </ul>	<ul style="list-style-type: none"> <li>– Reforms and policy change that reflect collective mobilization messages</li> <li>– Influence with local and social political bodies<sup>c</sup></li> <li>– Rules governing membership in communal organizations<sup>f</sup></li> <li>– Emergence of a group identity within the community<sup>e</sup></li> <li>– Questions, complaints and requests from women at village council<sup>f</sup></li> <li>– Positive perception of women’s groups and participation in public debate<sup>e</sup></li> </ul>
<p>Sources: <sup>a</sup>McMillan et al. <i>in</i> Alsop and Heinson 2005; <sup>b</sup>Mayoux 2000; <sup>c</sup>Oakley 2001; <sup>d</sup>Holland and Brook 2004; <sup>e</sup>Klouda 2007; <sup>f</sup>Malhotra et al. 2002.</p>		

*“Power with has to do with finding common ground among different interests in order to build collective strength. Based on mutual support, solidarity, collaboration and recognition, and respect for differences, power with multiplies individual talents, knowledge and resources to make a larger impact. Power with can help build bridges across differences by openly acknowledging conflicts and seeking to transform or reduce them for a larger aim. Power with can generate a larger impact but can also provide a grounding sense of community and spiritual connection. At this moment when social justice efforts feel over-institutionalized and fragmented, deliberate strategies to construct and promote power with are vital, including alliances and movement-building. All of these require processes to acknowledge diversity and disagreement while seeking common ground around values and vision” (Miller et al. 2006).*

violence was occurring, and to protest alcohol-related violence at the community level (CARE 2014a).

#### POTENTIAL PROCESSES

**Political-cultural empowerment.** In a mixed-methods assessment of grassroots groups and resource-poor women’s empowerment in India, Subramanian (2011) constructed an index of political-cultural empowerment to highlight the interplay of structure and agency: how the agency of individuals (in particular, their leadership style) shapes the characteristics and structure of a group (i.e. the involvement of members in shaping their own rules and norms); and how in turn the structure of a group (age of members, relatively more bureaucratic structure) determines their achievements in what she terms “political- cultural empowerment.” To capture the nature of group dynamics and the processes of consciousness, confidence and collective action over time, the study tracked variables such as duration of membership; the structure of the group (bureaucratic, hybrid or collectivist); the size of the group; and the style of leadership of the group’s leader. Sub- questions in the index of “political cultural empowerment” measured respondents’ conformity to social norms in belief and in action (Subramanian 2011):

- a. A woman should leave the room whenever any male individual enters the room (agree/unsure/disagree).
- b. A woman should leave the room whenever any elder enters the room (agree/unsure/disagree).
- c. Is respondent actively working within family to seek freedom to visit the nearby town?
- d. Is respondent actively working within the community to seek representation of women in *Gram Panchayat*?
- e. Is respondent actively working within the community to seek representation of women in *Panchayat* committees?

**Participatory performance tracker.** CARE’s group participatory performance tracker and collectives readiness tool offers processes for systematically tracking the functionality and efficacy of a collective, and tracking

its “graduation” to maturity and self-sufficiency. One domain relates specifically to gender equity (tracking, for instance, existence of bylaws related to gender leadership and membership); others relate to group cohesion and leadership, group skills and functions, group members’ use of agriculture techniques, expansion of networks, and other market achievements. The tool is a facilitated self-assessment administered by groups every 6 months. Using agreed-upon definitions for each domain (e.g. “group is led by elites with little input from other members, especially from marginalized communities”), the group members rank themselves from 1 (poor) to 4 (excellent) and calculate an overall group score. This score is used along with other tools for managers to determine the maturity of groups and where they may need further strengthening.

**Measures of group change.** Measures of group change were a key component of the process of CARE’s strategic impact inquiry into women’s empowerment. In his guidance note for this process, Klouda (2007) denotes several domains where change related to group participation may be expected. These include changes in individual interactions within the family (self-esteem, better family relations); changes within the group itself (relationships of solidarity and trust, formation of friendships, evolution of formal laws and rules); emergence of a group identity within the community (sense of identity, belonging, recognition); and further evolution of a group (some becoming exclusionary, others taking action in realms well outside the original purpose of the group’s formation). Within each of these domains, a checklist of indicators was proposed, such as “dress improvement (scale 1–5 before and after group)” and “attitudes toward the future (as reflected in activist or resigned behaviors around savings, insurance, education of children, etc.).” These indicators (and others that emerged during narratives) were coded, quantified and used to back up narrative reports (Klouda 2007).

### 3.5.2 Social capital, networks and solidarity

As noted earlier, social capital is often measured as a livelihood capital, a social asset that strengthens women’s fall-back position and supports resilience in economic hardship. While documenting expansion of social networks (for both livelihoods and political achievements) is important, the number does not capture some of the less tangible factors that give meaning to group association. A multicountry investigation into the “pathways and motorways” to women’s empowerment returned consistently to the vital importance of relationships of solidarity and support to foster collective action in favor of women’s empowerment. The quality of relationships (often expressed in terms of love, respect and trust) appears to be a critical factor in determining positive collective change. The quality of the relationships to monitor may include not only those of group members, but interactions with other direct intermediaries, such as social workers, front-line workers and government agents (Cornwall 2014).

#### POTENTIAL PROCESSES

**Social change network analysis.** Social change network analysis is a framework and approach for assessing the functioning, purpose and aims of a network. The approach is heavily based on participatory methodology as the primary means to gather and assess information on the social and political outcomes generated by networks. The design also enables autonomous network members to increase their own analysis skills. The approach highlights four qualities intersecting with three operational dimensions, which construct the backbone for any network assessment. The four qualities are democracy, diversity, dynamism and performance. The three operational dimensions are political purpose and strategies, organization and management, and leadership and participation.

Some of the key strengths of the approach that makes it particularly suitable for gender-transformative approaches are the following:

- It underscores the importance of organic outcomes—the internal changes experienced by staff and network members—in addition to general impact and other outcomes. This is an important dimension of change that is often overlooked and helps us to understand if the existence of the network adds value for its members.
- There is a significant focus on measuring political outcomes, examining how social actors and network members influence longer-term changes in social relations and in shifting power structures in a given setting (Wilson-Grau and Nuñez 2007).

### 3.5.3 Equitable household decision-making

The household is often considered the core social institution and is recognized as a site of “cooperative conflict,” in which individuals have both joint and separate interests (Razavi 2007). Household decision-making is used frequently in household surveys, and is proposed by many researchers as a potentially internationally comparable measure of expanded agency. Ibrahim and Alkire (2007) make a distinction between two commonly used decision-making indicators. The first is the extent to which individuals exercise control in their life or power over everyday personal activities (with response options usually ranging from “control over all decisions” to “no control at all”). The second indicator represents personal choice or power to—the degree to which an individual can influence specific household decisions. Standard questionnaires include a module about “who usually” makes a tested range of large and small decisions, with response options usually being “respondent,” “respondent and spouse jointly,” “someone else,” and “other.”

**Table 13. Social capital, networks and solidarity.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>– Increase in networks of support in times of crisis<sup>a</sup></li> <li>– Acting as a role model for others (particularly in nontraditional roles)<sup>b</sup></li> <li>– Women reporting increase in social status and self-esteem<sup>c</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Relationships of love, solidarity and trust within groups<sup>c</sup></li> <li>– Quality of relationships with intermediaries (frontline workers, social workers)<sup>c</sup></li> <li>– Increased support (emotional, instrumental or general) from family and community members<sup>c</sup></li> </ul>	<ul style="list-style-type: none"> <li>– Extent to which men regard women as equal to them</li> <li>– Perception of fairness; likelihood of women obtaining justice in disputes between a man and a woman<sup>a</sup></li> <li>– Women’s ability to affect political decisions<sup>a</sup></li> <li>– Linkages to social movements</li> </ul>

Sources: <sup>a</sup>Alsop and Heinson 2005; <sup>b</sup>Mayoux 2000; <sup>c</sup>Klouda 2007.

**Table 14. Household decision-making.**

Agency	Relations	Structures
<ul style="list-style-type: none"> <li>- Ability to make strategic decisions (choosing spouse, fertility and child spacing)<sup>a</sup></li> <li>- Perception that one’s opinion is respected</li> <li>- Sense of appreciation in the household</li> <li>- Willingness to make independent decisions<sup>b</sup></li> </ul>	<ul style="list-style-type: none"> <li>- Degree of controlling behavior by intimate partner</li> <li>- Spousal and family communication patterns</li> <li>- Couple’s communication<sup>a</sup></li> <li>- Incidence of family conflict (i.e. arguments or physical or sexual conflict)</li> <li>- Active listening; sitting down together for discussion<sup>d</sup></li> </ul>	<ul style="list-style-type: none"> <li>- Women’s exposure to coercive controls<sup>c</sup></li> <li>- Customs that govern whether women are allowed to disagree with husbands<sup>b</sup></li> <li>- Perceptions that certain decisions are exclusively male or female</li> </ul>
<p>Source: <sup>a</sup>Malhotra et al. 2002; <sup>b</sup>Alsop and Heinson 2005; <sup>c</sup>Mason and Smith 2003 <i>in</i> Alsop and Heinson 2005; <sup>d</sup>CARE 2014.</p>		

Despite its common use, this indicator can be problematic both to collect and to interpret. Standardized response categories do not lend themselves to nuanced discussion (what does it mean to make a “joint” decision?). In some cases, the social norms and social expectations around women’s involvement in certain decisions can lead women to understate their role when questioned or in fact to trade away some decision-making authority in exchange for other benefits (Doss et al. 2014). In other cases, as Alsop et al. (2006) point out, data on who makes what decision can ignore the possibility that a person might delegate a given decision or have no interest in it. To correct that problem, they suggest adding an additional question that captures “the degree to which a person could influence a decision if they wanted to” (22).

Another important limitation has been the overwhelming focus on the situation of married women (or those living in unions), where empowerment is operationalized largely in terms of relations between marital partners, which misrepresents the complexities and significance of negotiations in joint families, polygamous households or female-headed households (Malhotra et al. 2002). Analysis of decision-making modules may be slanted toward a possibly untrue assumption that “sole” control is the ideal. For example, in a gender analysis in Cambodia on decision-making patterns, women clearly affirmed that they did not prefer sole control over major livelihood decisions but demanded to be equitably involved in the decision process over these assets (Hillenbrand et al. 2014). In CARE’s Pathways baseline survey, female-headed households were (by virtue of their decision-making autonomy) considered more “empowered” than women in married households, yet they were significantly more vulnerable in their asset base and fall-back position (TANGO 2013).

In addition to the problematic response categories, the domains of decision-making used in surveys can be problematic. An unstated operating assumption in most household-level studies is that a person’s ability to make strategic life choices “is linked with her access to, and control over, economic and other resources and her ability to make smaller, quotidian decisions” (Malhotra et al. 2002). Decisions are often purposively selected that relate directly to a project’s activities. Decision-making surveys tend to emphasize control over material and financial decisions to the exclusion of strategic decisions that have a major impact on a woman’s life, such as whom she will marry. The strategic relevance of decisions is often specific to the community context and ethnic and socioeconomic status; it can be easy to exclude the small or large decisions that are likely to matter most for women in specific circumstances. Further, it can be difficult to assign relative weights to the range of decisions that are included in an analysis: decision-making power over cooking is unlikely to be equivalent to decision-making power over marriage or children’s schooling or health, but they are given equal weight in empirical indices. Increased control over decisions that fall into the typically female domain (such as what to feed the children and control over women’s own earnings) gives little indication of the full extent of women’s bargaining power within the household, or whether gender norms have shifted.

#### PROMISING PRACTICES

**Qualitative and social norms analysis.** The inherent challenges described above call into question the usefulness of household decision-making as a correlate for other dimensions of empowerment. Malhotra et al. (2002) observe that the focus of household measures on decision-making may overshadow other key aspects

of voice, leadership and participation at the household level, such as couples' communication. Indicators on couple communication have been limited largely to studies on contraceptive use, while efforts at measuring sexual negotiation and communication have only begun to gain legitimacy with emerging research on HIV and AIDS. Changes in communication patterns may be a meaningful first step toward genuinely negotiated power and respectful relations. For instance, CARE's qualitative Pathways mid-term review found that while decision-making control patterns had not markedly changed in the course of the program, a number of progress markers indicated improvements in communication, negotiation and respect for women's opinions, such as "he shouts at me less and talks to me more," "men and women now sit down together when we make decisions," and "we practice active listening" (CARE 2014b). Qualitative and social norms analysis may capture changes in women's exposure to coercive controls that influence their opinions in household decision-making processes, the extent to which specific decisions are perceived as exclusively male or female, and customs that govern whether women are allowed to disagree with their husbands or not (Ibrahim and Alkire 2007). Indicators of individual empowerment in this domain may include willingness to make independent decisions, the perception that one's voice is respected or a sense of appreciation in the household (Alsop and Heinson 2005 *in* Ibrahim and Alkire 2007).

Some promising practices can improve the accuracy and usefulness of the standard indicator. Alsop and Heinson (2005) note that using participatory and qualitative studies is important to identify the decisions that are meaningful in resource-poor people's lives (Ibrahim and Alkire 2007, 22). While qualitative discussions may be difficult to quantify and compare across cultures and contexts, the process itself may be transformative. In the same mid-term evaluation by CARE mentioned above, for example, a participatory rural appraisal cash-flow tree exercise was used to explore decision-making patterns. The female respondents found it eye-opening to observe that their opinion was valued principally in decisions where their financial input was needed (CARE 2014a).

**Storytelling and drawing tools.** Other qualitative, participatory and open-ended approaches found in CARE's *Gender Toolkit* use storytelling and drawing tools to explore individual and collective perceptions about decisions—as well as how the respondents perceive the power dynamic in each situation and how they would like existing power dynamics to change. In one drawing exercise, participants are asked to identify and draw

critical turning points in a person's life ("When did a major change take place in your life?") and to discuss how different individuals are involved in that decision. For each identified scenario or decision (adult or adolescent), the facilitator asks respondents to discuss the following:

- Who usually makes the decisions, adults or girls (boys)?
- Which type of decisions do adults and girls (boys) make?
- Which ones do you think that adults should make and why? Which ones should girls (boys) make?
- Are there any situations where a girl (boy) might feel really small?

**Participatory mapping.** Another participatory tool, drawn from the reproductive health field, uses participatory mapping to explore the power dynamics in various relationships and how these affect women's condom use and negotiation success. A similar process can be adapted to explore power dynamics in other relevant decisions of a livelihoods program, including in market negotiations, internal group interactions, community decision-making bodies and negotiations with different family members.

A gender-transformative approach to this question needs to examine not only the actual decision-making involvement of men and women, but also changes in the social norms and expectations around what are considered to be exclusively male or female domains.

**Surveys.** With surveys, there is a need to situate and field-test both the selected domains of decision-making and the response categories in context and also to complement survey data with inquiry into the processes and relationships through which decisions are negotiated. A number of surveys provide examples of field-tested, context-specific decision-making response categories, which can eliminate some of the ambiguities around the substantive, consultative or pro forma nature of women's participation in decisions.

A baseline survey from a health project in Pakistan integrated some open-ended processes, allowing women themselves to identify what they consider to be a major recent decision, and offers field-tested response categories (Box 1). Similarly, CARE Canada's LINKAGES project (CARE Canada 2013) offers guidance for using qualitative conversations to listen for a set of field-tested responses indicating graduated degrees of autonomy and influence in the household (Box 2).

BOX IV – Indicator of household decision-making

**Q1. - When decision are made regarding the following aspects of household life, who is it that normally takes the decision?**

a) Minor Household Expenditures	
b) What to do if you have a serious health problem	
c) How to protect yourself from violence	
d) Whether and how to express religious faith	
e) What kind of tasks you will do	

**Use following Codes:** Respondent [1] spouse [2] respondent and spouse jointly [3] someone else [4] jointly with someone else [5] other [6]

**Q2. - If answer in any of Q1 is different than respondent1 => (Using this same table)**

**To what extent do you feel you can make your own personal decisions regarding these issue if you want to?**

a) Minor Household Expenditures	
b) What to do if you have a serious health problem	
c) How to protect yourself from violence	
d) Whether and how to express religious faith	
e) What kind of tasks you will do	

**Codes:** To a high extent [4] medium extent [3] small extent [2] Not at all [1]

Source: For Question 1, See Table. For question 2, (R Alsop et al., 2006)

**Figure 8. Example of indicators of household decision-making.**

# Chapter 4: Recommendations

The literature review underscores that some areas of gender-transformative measurement (particularly around social norms measurement) are relatively new and do not have firmly established indicators in the livelihoods and agriculture sector. Further, appropriate indicators of transformative change are highly context-specific, subjective and often emergent. The nature of gender-transformative processes and the geographic, organizational and social complexity of livelihood systems and operating contexts make it unadvisable to prescribe specific leading indicators for programs. To develop appropriate measurement systems and leading indicators of change, a set of guidelines—rather than particular indicators—may help to ensure that programs have the access and ability to support gender transformation. These key recommendations are as follows:

## **Examine organizational systems and training with staff to promote gender reflection, dialogue and praxis.**

Alignment of organizations and individuals for gender-transformative change is critical to ensure staff and scientists at all levels of the organization are equipped to work in ways that are sensitive to and supportive of gender equity. Dialogues on gender with development staff and partners can integrate a mix of mandated introductory lectures or readings on evidence-based literature on gender and development approaches and critical debates, alongside personal and experiential reflections on gendered experiences, perceptions and values. Development actors should not only be supported in gender and social relations, but also require support and training to effectively contribute to and apply feminist monitoring, evaluation and learning systems. Along with greater engagement of social scientists, other specialized skill sets (e.g. in the areas of behavior change communication) may be necessary.

## **Recognize that gender-transformative change is an inherently political rather than technical process.**

Understanding that challenging power dynamics is a fundamentally political process may require a long-term shift in organizational thinking and partner engagement—not necessarily through direct intervention and mission drift but through deliberate linkages to other social movements and sectors that monitoring and evaluation systems have identified as important to people's quality of life and expansion of strategic choices. For measurement systems, this may mean being open to measuring collective mobilization and politically transformative skills (negotiation, critical reflection, literacy, information technology) and capturing outcomes

beyond the immediate confines of the project. A methodology such as outcome mapping can delineate the spheres of direct influence of the program partners and illuminate the limitations of the program's contributions (not attribution) to broader, long-term transformation.

**Engage in participatory action research approaches for gender analysis to identify and monitor leading indicators.** As with processes of complex social change, it is neither realistic nor desirable to prescribe indicators for measurement. Rather, gender analysis should be used as a basis for reflection and dialogue with program stakeholders to identify relevant issues for gender transformation and subsequently articulate leading indicators and actions to engage them. This literature review offers rigorous processes for identifying indicators through holistic gender analysis and learning systems, as well as a sampling of indicators and processes that have been used to measure them. (See, for example, Jupp and Ali 2010; Bragin et al. 2014; and outcome mapping.) We highlight a few key imperatives to ensure that these processes support equitable gender transformation:

- **Centralize the experiences and priorities of those who face multiple forms of social exclusion.** The political nature of empowerment underscores the importance of capturing how identities and oppressions intersect across gender, sexuality, occupation, ethnicity or race, class, caste, age, marital status, occupation, education level, or other factors. While participatory action research offers an important approach to ensure community ownership and engagement to shape programming, it is highly susceptible to elite influence and capture. Thus, specific efforts must be made to understand how communities and households are differentiated, and to focus attention on how programming remains accountable to marginalized groups. Gender-transformative programming should stand behind leadership within marginalized groups to drive change processes and engage others as allies to support gender transformation. Tools such as social network analysis (described in Chapter 2) can be used to identify these intersectional exclusions as well as influential voices for equitable change.
- **Remain sensitive to unintended outcomes and harm.** Gender-transformative change is a political process and is commonly met with backlash as existing power structures are threatened. Thus it is important to be cognizant of and responsive to threats that may emerge. Any programming that engages gender and

power relations can meet with tension and conflict, and monitoring gender-based violence and being equipped to respond is imperative. However, tension itself may also be an indicator that power relations are shifting, which can present positive opportunities to identify and mediate dialogues for constructive change if handled effectively. Measurement systems that are sensitive to unintended outcomes are able to identify unforeseen positive changes, which in turn may lead to more relevant and context-specific gender-transformative indicators.

- **Ground analysis across local realities and within broader political and economic trends at the macro level.** While this review primarily focused on community and household-level indicators, local trends are inextricably linked to broader trends in increasingly complex ways within the age of hyperconnectivity that has characterized the 21st century (Razavi 2007). Broader economic, social and political trends—including trends and power shifts in the development field—can also provide important context for interpreting and understanding change at local levels. Programming does not happen in a vacuum, and conflict, natural disasters, shifting political climates or economic downturns may shape changes in unexpected ways (Batliwala 2006). Macroeconomic policies that shape migration patterns or cripple indigenous industries, fishing resources or seed diversity, for example, can dramatically change gender norms and expectations around masculinity or femininity as well as livelihood strategies. On politically charged issues such as land control, some feminist scholars note that an exclusive focus on women’s individual property ownership and land titling can lead to policy reforms

that actually disadvantage women or detract attention from broader issues of foreign domination and capitalist transformation (Razavi 2007). Understanding local and national histories shapes gender analysis and remains important for understanding progress markers and above all ensuring that a development intervention does not stand in the way of political solutions and resource-poor people’s equitable access to social justice. In some cases, these broader issues may be opportunities for diverse individuals across communities to unite and advocate for needed changes in their lives.

- **Ensure tools can give insight on processes and experiences of gender transformation.** Measuring gender transformation requires a strong grounding in how people experience change—in relation to their own aspirations, their interpersonal relationships and their self-realization. Alongside measures on what changes are taking place, gender-transformative approaches place equal emphasis on capturing the processes and drivers of change.

**Organizational change is required to ensure effective gender-transformative monitoring, evaluation and learning systems.** Initiatives will need to make strategic decisions on what to measure based on analysis and strengthen systems for regular analysis, reflection and action in relation to learning and feedback loops. For effective monitoring, evaluation and learning systems, organizations must invest in staff to build technical skills as knowledge workers and foster an organizational culture that rewards innovation and learning—rather than output delivery and efficiency—as a way of working.

#### **Box 1: SECTION IX. PARTICIPATION IN DECISION-MAKING**

Q801 Think about the last time there was a major decision to be made in your house. It could have been sending a child to school, decision for marriage of child/ren, buying or selling livestock or jewelry, or paying for health or funeral expenses. How was this decision made? What was your role in making this decision?

- (1) Never been consulted.
- (2) Consulted in decision-making process but have no say in finalizing decision.
- (3) I have been given equal right to give my opinion.
- (4) Decisions are made after discussion with consideration for all and with collective suitability.
- (5) I make decisions myself.
- (6) I finalize decisions after consultation with family members.

Q802 Could you tell us which was that decision?



**Box 2:**

In your household, how are decisions made about how the profit from your business is used?

Ask this question to a small focus group or to individuals. Use it to start a discussion about how profit from income-generating activities (including farming, business ventures, etc.) is controlled and managed in the household. Ask an open-ended question and listen to the answers. Ask probing questions to generate discussions and dig for gender dynamics. Tick the closest one of the following eight options and write notes in the space provided. Do not at any time read out the options given below. It is important to keep this as an open conversation.

Listen for: Who has what role? How much say does the woman really have in the final decision? Does it sound like she is able to actively contribute ideas and have her wishes met or heard? If she says she and the other person do “joint” decision making, does it really sound like she has equal status to the other person in the discussion?

1.1. Of course I have a say in what I do with my income; it is only me in this house!

Enumerator, for widows or divorced women, it may be necessary to probe. Even if they are saying they do most of the decision making themselves, there may be someone else in the background.

1.2. I decide on how to spend the money myself, completely independently of my husband (or brother, uncle, mother-in-law, etc.).

1.3. I will sometimes bounce an idea off of another family member, but for the most part, my profit is in my control and I decide what to do with it.

1.4. I discuss with my husband. He may have suggestions. If they are good, I take them. If his suggestions are not the best, I use some means to avoid taking them.

1.5. For small needs I can decide by myself, but for others my husband and I discuss together. Even if he has different opinions from me, we express our views freely and he respects my knowledge and judgement. In the end, we find a solution that meets my needs and his.

1.6. With my business profits, my husband (or other) and I discuss. Even if I have some different ideas about how to spend the money, his say is greater than mine so I must take his advice.

1.7. I don't consider these to be my business profits. I'm doing this business for the good of the family. I put my money in a family pot, and my husband puts his in the pot, and then we decide together.

Enumerator, if you receive this answer, probe: Who puts more of their profits into the family pot, you or your husband (other)? When you decide together, whose say carries more weight? Why? It could be you get a final answer from options 6.2 to 6.6!

1.8. It is not me who decides and it is not my husband/other who decides, it is society. Society says that a woman should spend money on her children and her house, so that is what I do. Then, with the money I have left over, I invest in my business.

(Capelazo 2012)

**Make linkages and partnerships to support gender-transformative social change.** To operate ethically, organizations have an obligation to ensure they network and partner with other organizations that have gender-transformative expertise. As a program team, it is important to regularly sit down together to map other accessible resources and social movements that can support local communities to respond effectively to risks, conflicts, needs and opportunities that may emerge over the course of programming.

**Ensure monitoring, evaluation and learning systems and programming remain accountable to marginalized community members.** The emergent ways in which gender-transformative monitoring, evaluation and learning systems are constructed often contradict traditional donor expectations. If gender-transformative approaches are to be implemented effectively, a broader cultural shift in the donor and development community and appropriate resourcing of skills, capacities and reflective processes are required. Pioneering organizations that are committed to gender transformation must advocate proactively with donors and development partners to negotiate a balance in measurement methods and indicators to better reflect and explore local realities. Given the risks and political dynamics surrounding gender-transformative work, organizations must uphold accountability to marginalized groups targeted in programming. This level of advocacy is important to shift

the measurement status quo from proving one's worth and impact for donor reporting and fundraising toward exploring what it takes to support gender transformation within societies (Batliwala 2006).

Within the field of agriculture and livelihoods, monitoring, evaluation and learning systems continue to struggle to detect how gender relations are transforming and intersect with other forms of oppression. While progress has been made in understanding well-being through individual— rather than household—indices, there are few gender-synchronized monitoring, evaluation and learning systems that explore gender-transformative change for both women and men, and that monitor change within relationship dynamics. Social norms research also remains nascent, and there are few examples of systematic efforts to measure social norms. This situation falls short of gender transformation, as current measurement systems tend to look at gender equity in outcomes without sufficient grounding in interpreting the contexts within which change happens. Further, few metrics dig deeper to consider how new forms of power and relationships are emerging within societal structures and relations, beyond agency. Moving forward, there is immense potential for continued documentation of gender-transformative monitoring, evaluation and learning to advance feminist monitoring, evaluation and learning across practitioners in the agriculture and livelihoods sector and in the broader development field.



# Notes

1. <http://gendertoolkit.care.org/pages/frameworks.aspx>
2. <http://gender.care2share.wikispaces.net/Gender+Equity+and+Diversity+work+at+CARE>
3. <http://raisingvoices.org/activism/institutional/#tabs-212-0-3>
4. [http://www.who.int/gender/documents/OMS\\_Ethics&Safety10Aug07.pdf](http://www.who.int/gender/documents/OMS_Ethics&Safety10Aug07.pdf)
5. [http://gendertoolkit.care.org/Areas\\_of\\_Inquiry/7\\_Violence\\_Justice.aspx](http://gendertoolkit.care.org/Areas_of_Inquiry/7_Violence_Justice.aspx)
6. <http://gendertoolkit.care.org/Pages/exploitation%20analysis.aspx>
7. <http://www.usaid.gov/sites/default/files/documents/1865/USAID%20Toolkit%20gender-based%20violence%20Final%20Section%203.pdf>
8. <http://www.raisingvoices.org/wpcontent/uploads/2013/03/downloads/Activism/SBL/BasicMonitoringToolsOutcomeTrackingTool.pdf>
9. <http://www.intrac.org/data/files/resources/672/Tracking-Progress-in-Advocacy-Why-and-How-to-Monitor-and-Evaluate-Advocacy-Projects-and-Programmes.pdf>
10. <http://www.intrac.org/data/files/resources/672/Tracking-Progress-in-Advocacy-Why-and-How-to-Monitor-and-Evaluate-Advocacy-Projects-and-Programmes.pdf>
11. [http://gendertoolkit.care.org/Pages/Decision-making\\_Exercises.aspx](http://gendertoolkit.care.org/Pages/Decision-making_Exercises.aspx)

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