

# **Learning with Purpose from Empowerment**

A study of Methodological Barriers and Challenges to Enhancing Organisational Learning from Women's Empowerment and Gender Equality Interventions

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Abstract:

Since the early 1990's, sector-wide evaluation reports have identified substantial weaknesses connected to women's empowerment and gender equality interventions. These weaknesses result from the failure to institutionalise activities, a lack of resources and deficient reporting of results. Additionally, recent evaluation reports have identified the same weaknesses as were identified in the early 1990's. Subsequently, funding for the sector have increased from an average of USD 5,2 billions in 2007-08 to USD 8,8 billions in 2013-14. This indicates an emergent need to investigate why weaknesses persist despite a sector-wide acknowledgement of the importance and relevance of women's empowerment and gender equality. This thesis discusses this paradox through a literature review; 64 evaluation reports and 19 academic articles concerning methodological barriers and challenges to evaluating and reporting results are reviewed. The purpose is to propose approaches to enhance organisational learning by identifying challenges to the evaluation practices of gender-specific interventions. The results indicate that several challenges exist for the evaluating women's empowerment and gender equality; under prioritisation of learning, an emphasis on accountability, lack of impact-focus in measurements, a reluctance to prioritise context analyses and participatory approaches, and inadequate measurement practices of empowerment processes. This thesis discusses how to reduce these challenges and three approaches are proposed; to increase collaboration and coordination through networks, to formalise enforcement tools and learning strategies and to mainstream organisational learning by decentralising evaluation responsibilities. This thesis thus concludes that the sector-wide weaknesses will persist unless stakeholders prioritise learning as a pivotal element of their organisational structure.

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## Abbreviations

ALNAP: Active Learning Network for Accountability and Performance

CCA: Climate Change Adaptation

CD: Capacity Development

CIDA: Canadian International Development Agency

DAC: Development Assistance Committee

DANIDA: Danish International Development Agency

DFID: Department for International Development (UK)

EC: European Commission

GBV: Gender-based Violence

GE: Gender Equality

JCGBV: Joint Consortium on Gender-based Violence

LFA: Logical Framework Approach

M&E: Monitoring and Evaluation

MFA: Ministry of Foreign Affairs

NORAD: Norwegian Agency for Development Cooperation

OECD: Organisation for Economic Cooperation and Development

SIDA: Swedish International Development Cooperation Agency

UNDP: United Nations' Development Programme

WE: Women's Empowerment

WEGE: Women's Empowerment and Gender Equality

WEGEI: Women's Empowerment and Gender Equality Intervention

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## Popular Scientific Summary

Each year, billions of US dollars are allocated through international development aid to interventions that aim to empower women and promote gender equality in developing countries. These interventions are often cross-sectorial, which means that they have several aims and seek to expand women's ability to make strategic life choices in contexts where this ability was previously denied to them, while also improving societal conditions in areas of climate change adaptation, education, nutrition, infrastructure and health. Development aid to this sector has increased from an average of USD 5,2 billions in 2007-08 to USD 8,8 billions in 2013-14, which indicates a common notion of the importance and relevance of women's empowerment and gender equality. At the same time, taxpayers and decision makers in donor countries are increasingly demanding results and value for their money, which have caused a results-based agenda, affecting the ways in which development interventions are evaluated.

Subsequently, comprehensive reports have since the early 1990's identified several weaknesses connected to women's empowerment and gender equality interventions. Recent reports have come to the same conclusion, which indicates that the sector has not succeeded in implementing previous recommendations. This means that the same challenges and weaknesses identified in the early 1990's still prevail, despite a sector-wide recognition of the importance of improving the practices of empowering women and promoting gender equality. The weaknesses often result from the failure to institutionalise activities, a general lack of resources and deficient reporting of results.

The fact that funding is increasing, while weaknesses persist, suggests a paradox. This thesis discusses this paradox by focusing on the defective practice of evaluating interventions and reporting results through a literature review. This is done through the analysis and review of 64 evaluation reports and 19 academic articles regarding the methodological barriers and challenges to evaluating and reporting results.

The results indicate that several barriers and challenges exist for efficient evaluation of women's empowerment and gender equality intervention, such as an under prioritisation of learning strategies, an emphasis on accountability, lack of impact-focus in measurements, a reluctance to prioritise context analyses and participatory approaches, and inadequate measurement practices of empowerment processes. This thesis further discusses how to reduce the consequences caused by these barriers and challenges, and three approaches are proposed.

It is thus recommended to increase collaboration and coordination through stakeholder networks, to formalise enforcement tools and learning strategies and lastly, to mainstream organisational learning by decentralising parts of the evaluation responsibilities to the local level. It is hence possible to conclude that the sector-wide weaknesses will persist unless stakeholders in the WEGE sector start to prioritise learning as a pivotal element of the organisational structure.

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## 1. Introduction

This chapter holds the introduction to the research and the background of the topic. Firstly, the motivation section frames the topic. Secondly, the problem area presents the issue of evaluating women's empowerment and gender equality interventions (WEGEIs) in the context of the results-based agenda and the aid effectiveness paradigm, hereby presenting the context and the enabling environment of the research topic. Thirdly, the problem area is followed by a presentation of the aim, as well as the research questions.

### 1.1 Motivation

In 2000, a report developed by Sida reviewed agency experiences of women's empowerment and gender equality interventions (WEGEIs) in the period of 1993-1998 (Woodford-Berger, 2000). The report followed up on the recommendations of the DAC (Development Assistance Committee) assessment study from 1993 concerning members' evaluation policies and practices regarding WEGE. The report concluded that serious weaknesses connected to the monitoring and evaluation (M&E) practice of WEGEIs in the period of 1993-1998 prevail and persist, and that areas recommended for improvements include those highlighted in the 1993 assessment, which means that agencies had failed to implement the proposed recommendations from the previous assessment.

In 2006, the Norwegian Agency for Development Cooperation (Norad) commissioned an evaluation of the 'Strategy for Women and Gender Equality in Development Cooperation'. The report concluded that there were substantial weaknesses in the "*institutionalisation of activities, a lack of resources and deficient reporting of results in the field*" (Norad, 2006). The report constituted a review of evaluation reports from several international agencies. The findings applied to gender-specific development support and the report concluded that there is an emergent need to investigate why these weaknesses prevail in efforts to empower women and promote gender equality (Norad, 2006). This means that serious challenges to successful implementation of WEGEIs persist in 2006 despite a broad attention to the issues of WEGE within the development sector, which might indicate that the development community has failed to live up to its commitments to pursue women's empowerment and gender equality (Woroniuk, 2014). Thus, this research aims to investigate the current state of the M&E practice of WEGEIs, and how and if the issues identified in the two reviews continuously prevail, despite a sector-wide focus on 'learning and improving' and a long-term commitment to gender equality, both as a cross-cutting theme and a development aim.

## 1.2 Problem area

‘Women’s empowerment’ is a dynamic concept originally used to define the process of grassroots struggles to transform unequal power relations, but has now become part of an “*expansive discourse coalition of corporations, global non-governmental organisations, banks, philanthrocapitalists and development donors*” (Cornwall, 2016: 342) that seeks to promote gender equality. The most recent High-Level Forum for Aid Effectiveness, held in 2011 in Busan, clearly indicated that capacity development (CD) is a key priority for global development cooperation and that women’s empowerment and gender equality as a theme within the CD sector have gained a strong foothold (Batliwala, 2011; Cornwall, 2016; Gendernet, 2016). This is both evident in the content of the final document of the forum and in the general increase of aid being allocated to the WEGE sector (OECD, 2011; Gendernet, 2016). In 2013-2014, aid allocated to women’s economic empowerment reached USD 8,8 billions on average, which is an increase from USD 5,2 billion in 2007-2008 (Gendernet, 2016). Despite this increase, it is important to note two main constraints. Firstly, the vast amount of aid is allocated to activities with GE as a ‘significant’ objective, meaning that it is an important, but secondary objective of the activity. Secondly, less than 24 per cent of the aid to economic sectors targeted GE as a primary or secondary aim in 2013-14, which is significantly lower than the average of 35 per cent across all sectors (Gendernet, 2016).

The past decades have witnessed a shift in the politics of international development and a change in factors influencing support for WEGEIs (Batliwala, 2011; Langenkamp & Heidbrink, 2006). Taxpayers and decision-makers in donor countries are increasingly demanding results and value for their money, which have resulted in a ‘results-based agenda’, affecting the ways in which development interventions are planned, designed, implemented and evaluated. The agenda has led to a focus on tangible results, which seems uncontested by most actors in development cooperation. There is arguably consensus on the fact that “*we need performance information to understand and adapt to development contexts and to make informed choices*” (Vähämäki et al., 2011: 2). Consequently, the 2011 High-Level Forum marked the beginning of the ‘aid effectiveness paradigm’; a paradigm with strong emphasis on quantifiable results and ‘value-for-money’ when it comes to aid and development (Mawdsley et al., 2014).

These tendencies mean that “*the question of ‘what works’ in international development policy and practice is becoming ever more important against a backdrop of accountability and austerity*” (Gayfer et al., 2012: 445). Donors thus create vast pressure for implementing partners and evaluators to measure more than is possible (Mawdsley et al., 2014), which

consequently means that pressure is manifested in the implementing partners to continuously show results that comply with programme mandates (Ortiz & Taylor, 2008). Subsequently, it is commonly understood that development assistance is not working as well as it has potential to, and one of the main reasons is that organisations are failing to learn from experience (Forss et al., 1994).

The role of monitoring and evaluation (M&E) is traditionally to provide knowledge on what works and what does not (Ortiz & Taylor, 2008) and following this notion, M&E should help us understand the impacts of interventions, inform organisational management processes and enhance adaptive learning. However, it is a wide-spread notion that development organisations find it difficult to prioritise learning despite a sector-wide motivation to enhance the practice (Eyben & Napier-Moore, 2009). Instead, M&E is primarily undertaken with the aim to inform donors and to ensure accountability. Thus, an investigation of why methodological barriers and challenges persist, and a discussion of how these can be solved, is necessary in order to discuss how organisational learning can be enhanced in the context of WEGEIs.

### 1.3 Research aim

The aim of this research is to propose approaches to enhance organisational learning in the context of WEGEIs by identifying challenges to its M&E practices. The research thus focuses on two main areas; challenges and methodological barriers to M&E and the operationalisation of organisational learning.

### 1.4 Research question

The research question comprises one main question and three sub-questions, as it is necessary to answer the three sub-questions in order to answer the main question.

*Which challenges exist for monitoring and evaluating WEGEIs, which implications do these challenges have for organisational learning, and how can these implications be reduced?*

SB1) Which challenges for M&E practices do the WEGE sector experience?

SB2) How is organisational learning as a strategy operationalised by organisations and institutions working to empower women and promote gender equality?

SB3) How can the WEGE sector reduce the challenges identified and strengthen organisational learning from interventions?

## 2. Methodology

This chapter presents the methodology of the research, which is based on two literature reviews. It describes the data collection method and the research process in detail. The first section discusses the review method and how it relates to studying evaluations in the context of international development, while the second section describes the research process in detail.

### 2.1 Literature reviews in the context of international development

A literature review is a thorough summary and a critical analysis of what is known about the topic being studied (Hart, 1998; Cronin et al., 2008; Ramdhani et al., 2014; Randolph, 2009). A literature review has several purposes, depending on the specific content and scope of the study being conducted. However, there are in general two main objectives of a literature review. The first one is to provide an understanding of the knowledge available of a certain topic (for example ‘what is known, in scientific literature, about evaluating women’s empowerment and gender equality interventions?’). The second purpose is to highlight the significance or need for new research within that research field (for example, ‘what needs to be known about evaluating women’s empowerment and gender equality interventions?’) (Cronin et al., 2008).

Recently, systematic reviews, which are more rigorous than traditional literature reviews, have emerged as a key method in the sector of international development with the purpose to inform policy-making. A systematic review is perceived as an unbiased and rigorous method to map evidence within a complex sector and can be defined as a rigorous type of literature review (Mallet et al., 2012), which means that the method essentially functions as a comprehensive statement about what works. The method involves synthesising and assessing all available evidence-related literature on a topic in order to develop an empirically derived and robust answer to a research question (Mallett et al., 2012).

However, there is a concern that systematic reviews carried out in a *“rigid and non-reflexive manner, may generate partial and misleading ‘statements about what works’ that are nevertheless seen to be authoritative and trustworthy”* (Hagen-Zanker & Mallett, 2013: 1). A literature review, on the contrary, allows the research to be flexible and less rigid, which is necessary when seeking to investigate how learning is operationalised in practice, as in the case of this research. At the same time, it is possible to transfer some of the core principles of systematic reviews to the practice of literature reviews to increase the transparency and the replicability of the research, which potentially improves the quality and the strength of the

review. Pritchett and Sandefur (2013) term systematic reviews as a ‘rigid method’ in international development research. They argue that strict rankings can be highly misleading and recommend instead to evaluate programs focusing on the specific context and not attempting to identify best-practices “*by putting most weight on the most rigorous evidence with no allowance for context*” (Pritchett & Sandefur, 2013: 1).

The above notions mean that the literature review is separated into two processes; one comprises a scientific literature method that follows the standards of systematic reviews, and seeks to generate academic articles. The second review seeks to generate evaluation reports and hence represents the practical field. The latter review follows a more flexible method in that it only includes literature from a grey-literature database, namely the evaluation report database of the OECD (DEReC). It was hence chosen to adapt the traditional literature review method to the research aim, for example by dividing the review process into two, and by focusing on grey literature in the form of evaluation reports in one of the reviews.

The review identifying academic literature adheres to the principles of a systematic literature review, comparable to the approach developed by ALNAP (see figure 2.1.1). The second review method contains room for flexibility in order to limit the search to one evaluation database. The scope of both reviews was rather broad, as one sought to generate academic peer-reviewed articles regarding women’s empowerment evaluations, while the other review aimed at identifying M&E reports evaluating gender-related interventions in several thematic areas. Numerous M&E reports were cross-thematic and covered more than one area, which meant that it was necessary to keep a broad scope in order not to exclude relevant reports.

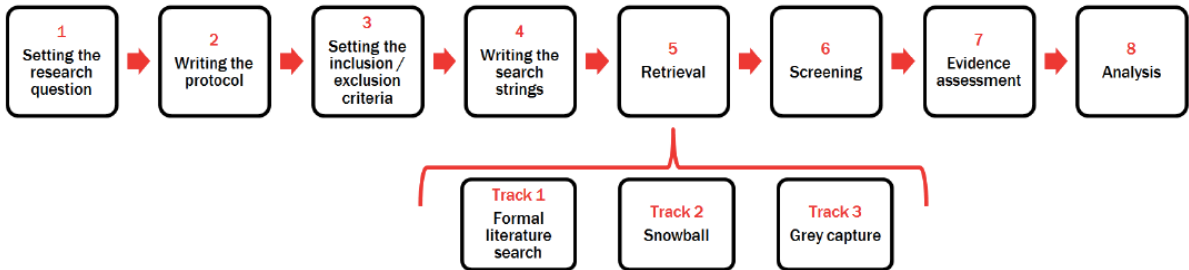
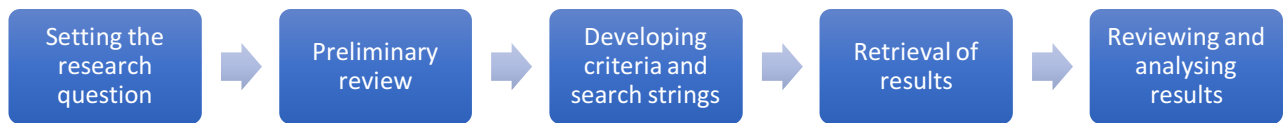


Figure 2.1.1 Stages in a Rigorous Literature Review (ALNAP)

The ALNAP evidence-focused review consists of eight stages and functions as the foundation of the adapted version applied to this research (see figure 2.1.2). The adapted review method is divided into five stages; 1. Setting the research question, 2. Preliminary review, 3. Developing

the inclusion and exclusion criteria and the search strings, 4. The retrieval phase, 5. Reviewing and analysing the final results.



*Figure 2.1.2 The research process*

### 2.2.1 Categorising the reviews

Randolph (2009) argues that a literature review can be categorised accordingly with a set of characteristics; focus, goal, perspective and coverage. It is firstly possible to reflect upon the focus of the literature reviews. Reviews focusing on research outcomes are the most common, as the outcomes-oriented review contributes in identifying the lack of information or knowledge of a topic, which establishes a justifiable need for a study (Randolph, 2009). However, this research focuses on both the outcomes and the practical application of the results; it identifies knowledge on learning from WEGEIs by focusing on the findings and conclusions of evaluations reports and academic articles, while subsequently encompassing an assessment of how evaluation methods are applied in practice. Therefore, the review was divided into two; one focusing on academic articles and one comprising evaluation reports in order to investigate both focuses. Further, the goal of the literature review is to generalise findings and to identify central barriers and challenges connected to the M&E practice of WEGEIs, and to investigate how these implicate organisational learning. The third characteristic, the perspective of a review, depends to a large degree on whether the review is based on quantitative or qualitative research (Randolph, 2009) and because these two reviews are based on qualitative traditions, biases are revealed and discussed to reduce the invalidity that they potentially create (see section 3.1). The final characteristic is coverage, which refers to the degree of exhaustiveness of the review, meaning the process of deciding how wide to cast the net in the retrieval phase of the review. Some reviews claim to be exhaustive, while others choose a representative sample of articles that represents the most central pieces in a field (Randolph, 2009). The review of the academic articles includes all articles identified in the databases that passed the criteria, as elaborated in the following section.

## 2.2 Research process

This section describes the data collection process in five stages. These are described in detail, including the potential issues and biases connected with the research process. These are further

discussed in the following chapter, comprising the delimitations and methodological challenges of the research.

### 2.2.1 Developing the research question

The first stage of the research process comprised developing the research question. Firstly, the aim was developed based on the motivation and knowledge of the topic. The aim of the research is to propose approaches to enhance organisational learning in the context of WEGEIs by identifying barriers and challenges to the M&E practice. Therefore, the research questions seek to identify challenges to M&E practice of WEGEIs, and secondly to investigate the implications that these challenges pose for enhancing organisational learning. The three sub-questions were developed to narrow down the focus of the research and to guide the criteria and search strings. As the research questions guide the search strings of the review, and hence also determine which data is generated, it is essential that the questions are focused and that search strings are carefully considered. This can be ensured through a preliminary review.

### 2.2.2 Preliminary review

Because of the broadness and complexity of the topic, it was chosen to conduct a preliminary literature review to identify which areas and issues were the most relevant. It can be challenging to construct a review in an interdisciplinary field because of the complexity (Webster & Watson, 2002) and a preliminary review of ‘what is out there’ creates the knowledge necessary to reduce this complexity. A challenging task to overcome when conducting a review is the first step, namely to develop a research question (Ramdhani et al., 2014), as one can risk selecting a focus that is either too broad or too narrow, which potentially implicates the research process.

Thus, a preliminary review creates a knowledge overview of the field and limits the complexities of defining a research aim. Also, the field of women’s empowerment and gender equality interventions is characterised by conceptual ambiguity (see section 4.1), which emphasises the need for such a review. The preliminary review provided an overview of the concepts and guided the search strings of the main literature review, for example by identifying the conceptual discrepancies and their implications for the research (see sections 3.2 and 4.1). The preliminary review generated a large amount of results from several different research areas, which indicated that the search string was inadequate for the research aim and in need for a clearer purpose and delimitation through inclusion and exclusion criteria. The preliminary review was conducted through JSTOR, as clarified below.

## JSTOR

Search string: *women empowerment AND gender equality intervention evaluation*

- Initial search: 8,055
  - o Action: Include ‘empowerment’ in the title and/or abstract (AND empowerment, abstract)
- Search result: 4,692
  - o Action: Exclude results with the word ‘mainstreaming’ in the abstract (NOT mainstreaming, abstract)
- Search results: 4,687
  - o Action: Results must include ‘evaluation’ in the abstract (AND learn(ing), abstract)
- Result: 75

JSTOR generated numerous articles despite attempts to limit the results and adjust the focus. Also, the results (75) consisted of 74 journal articles and 1 book and were spread out on 29 different subjects with a majority in education (34). Also, most articles regarded mainstreaming of gender equality in western-focused institutions and settings, which meant that JSTOR was deemed inadequate for the following literature review. Thus, the two databases chosen for the academic literature review focused more on international development areas and sectors.

### 2.2.3 Developing the criteria and the search strings

The preliminary review made it apparent that altering the search string affects the results, which initiated a reflection on concepts and criteria. The preliminary review indicated the necessity of including the search words ‘evaluation’ and ‘empowerment’ in abstract and/or title to maintain a focus, making the results more streamlined and hence within the same sectors (international development) and themes.

#### Content type

- For M&E reports: must be full-text versions of evaluations and/or monitoring reports of international interventions or development cooperation policies, which meant to exclude appendices, frameworks, toolkits, academic studies and project designs.
- For academic articles: peer-reviewed and full-text

#### Language

- For all databases: available in English



## Time limitation

- For all databases: it was chosen to have a limitation on publication dates and the research includes results published after 1993, and excludes documents published earlier. This was chosen on the background of a search result analysis in Scopus, showing that the first result was published in 1993 and that the number of results did not increase prior to 2002, peaking in 2010 with 100 results (see figure 2.2.3).

## Scope and search words

- For all databases: the search results must include the word *evaluation* in the abstract and/or in the title. This was developed after the preliminary review, as the initial search generated several results not focusing on M&E.
- For all databases: the search results must directly focus on empowerment and must include *empowerment* in the abstract and/or in the title.

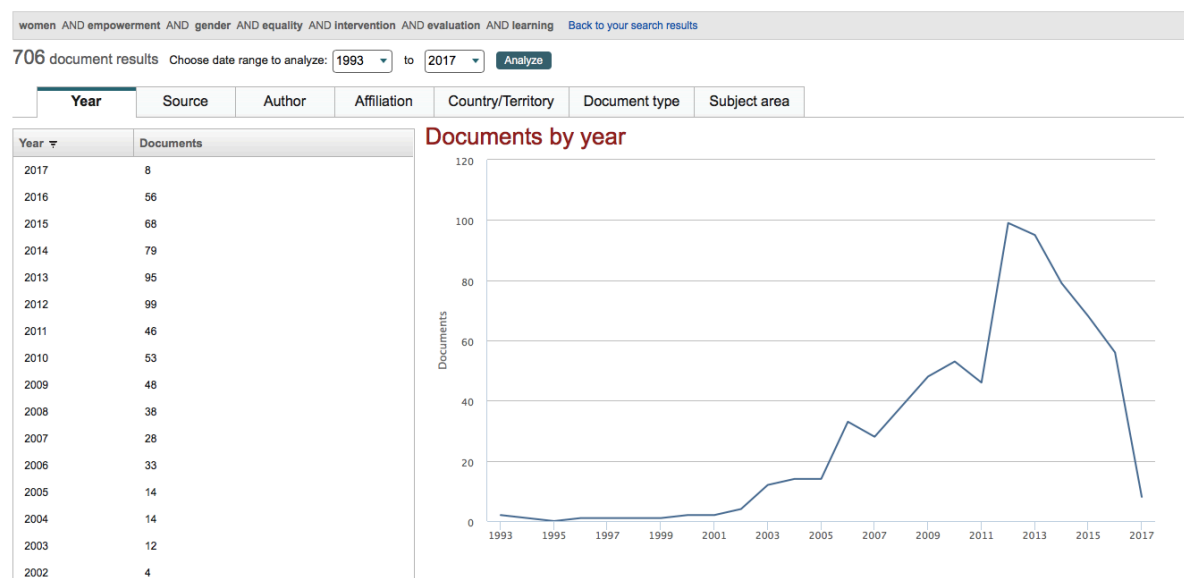


Figure 2.2.3 Search Result Analysis of Scopus

Following the preliminary review and the criteria development, the search string is as follows; *women empowerment and gender equality intervention evaluation*. However, many databases are designed differently and the search string had to be adapted to the specific database system.

## 2.2.4 Retrieval

This subsection describes the retrieval stage of the reviews, divided into two sections. The first section goes into detail with the review generating ‘grey literature’ in the form of M&E reports

and how these were identified, retrieved and analysed, and for what purpose. The second section describes the research processes of both reviews.

2.2.4.1 Databases and grey literature

The databases used in the research are divided into two categories, one for each review. The first category comprises academic literature, while the second category is developed with the purpose of retrieving ‘grey literature’ in the form of evaluation reports.

Table 2.2.4.1 Review databases

Academic literature databases	Evaluation report databases
Scopus	DEReC
SocIndex	-

Including grey literature increases the “*breath, relevance, topicality and ultimate utility of your review*” (Hagen-Zanker & Mallett, 2013: 11) and contributes to create a method, and a research process, able to capture data from a broad range of sources. ALNAP further argues that;

*“failing to incorporate a way of retrieving this material (grey literature, eds.) into the search strategy means you are unlikely to capture all available research – in particular research referred to as grey literature, such as working papers, concept notes, donor reports, policy documents and briefings”* (Hagen-Zanker & Mallett, 2013: 11).

In standard peer reviewed research, there is no strong emphasis on including grey literature in reviews. However, it is considered particularly relevant in the context of international development, especially when focusing on impact evaluations (Hagen-Zanker & Mallett, 2013:). In the context of this research, grey literature is particularly relevant as evaluation reports are within this category, and essential to include in answering the research question.

2.2.4.2 Data collection process

Scopus

Search string: *women AND empowerment AND gender AND equality AND intervention AND evaluation AND learn(ing)*

- Initial search: 713 documents
  - o Action: Results must include ‘empowerment’ in either the title and/or the abstract (TITLE-ABS-KEY empowerment).

- Search Result: 60 documents
  - o Action: Results must include ‘evaluation’ in either the title and/or the abstract (TITLE-ABS-KEY evaluation).
- Search result: 11 documents
  - o Action: Following the screening, 1 article was excluded as it did not meet criterion 4.2 (see table 2.2.5).
- Result: 10 documents

#### SocINDEX with Full Text – EBSCOHost

Search string: *women AND empowerment AND gender AND equality AND intervention AND evaluation AND learn(ing)*

- Initial search: 0 (the initial search string gave no results, which made it necessary to adjust the search string to the database)
  - o Action: Adjusting the search string to ‘women empowerment evaluation’
- Search result: 13 documents
  - o Action: 4 documents were excluded in the screening stage.
- Result: 9 documents

The results from the two databases comprised 19 peer-reviewed articles. These consisted of five literature reviews, five evaluation studies, four systematic reviews, four case studies and a meta-analysis. The oldest article was published in 1993 (Kendall, 1993), while the most recent was from 2016 (Jersky et al., 2016). Most articles were published in 2014 (8), followed by 2008 (3) and 2013 (3). Sample of the reviews are featured in appendix 1 and 2<sup>1</sup>.

#### DEReC – DAC Evaluation Resource Centre

Search string: *women empowerment evaluation*

- Initial search: 3711 documents
  - o Action: Choose ‘gender equality and women in development’ as the ‘sector or theme’
- Search results: 110 documents
  - o Action: Review and analyse
- Result: 64 documents

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<sup>1</sup> For the complete review, please contact author via [e-mail](#)

## 2.2.5 Reviewing and analysing results

This stage firstly assessed the relevance of the results by reviewing them accordingly with the criteria. Once the reviews were completed, articles and reports were analysed in depth using the review and analysis system (table 2.2.5). It is pivotal to have a structured approach in this process, which is why this review applies a method that facilitates consistency and systematic assessments of the data (Ramdhani et al., 2014). Appendices 1, 2 and 3 hold samples of the reviewed articles and reports<sup>2</sup>.

*Table 2.2.5 Review and analysis system*

<b>Review of academic articles</b>	<b>Review of grey literature (evaluations)</b>
Title	Title
Author and year	Criterion 1 – Content type (full-text versions of evaluations and/or monitoring reports of international interventions or development cooperation policies, exclusion: appendices, frameworks, toolkits, academic studies and intervention designs). This step also includes duplicate removal.
Criterion 1: Full-text and peer-reviewed. This step also includes duplicate removal.	Evaluation carried out by
Criterion 2: Language (inclusion: English, exclusion: all other languages)	Donor/funding institution
Criterion 3: Time (inclusion: published in or after 1993, exclusion: published before 1993)	Year
Criterion 4.1: Search word ('empowerment' included in the title and/or abstract)	Criterion 2: Language (inclusion: English, exclusion: all other languages)
Criterion 4.2: Search word ('evaluation' included in the title and/or abstract)	Criterion 3: Time (inclusion: published in or after 1993, exclusion: published before 1993)
Source (Journal)	Criterion 4.1: Search word ('empowerment' included in title and/or abstract)
Purpose and/or aim	Criterion 4.2: Search word ('evaluation' included in title or abstract)
Data collection method	Type (evaluation of an intervention, programme, project or policy)

<sup>2</sup> For the complete review, please contact author via [e-mail](#)

The role of (organisational) learning	Level of the intervention (multi-country, national, local)
Main findings (of methodological barriers and challenges to M&E)	Purpose and/or aim
Thoughts/comments	Data collection method
-	The role of (organisational) learning
-	Main findings (of methodological barriers and challenges to M&E)
-	Thoughts/comments

The academic articles were reviewed and analysed by reading the title, abstract and conclusion, as well as to search for the word ‘learn(ing)’ to examine its notions on the role of organisational learning. The review of evaluation reports was similar, but designed with additional questions, as these required a more thorough read-through. Most reports had the same structure with an executive summary, comprising of purpose, methods, findings, lessons learned and recommendations. It was possible to investigate whether a chapter or section was dedicated to organisational learning through the table of content. If not, the text was skimmed through manually by searching for ‘learn(ing)’ to detect sentences and sections involving learning strategies. This made it possible to investigate if and how organisational learning was incorporated, or considered, in the report, thus collecting data to answer sub-question 2<sup>3</sup>.

The analytical approach was based on identifying tendencies qualitatively and categorising the results, as proposed by Cronin et al., (Cronin et al., 2008), which is exemplified in the different question sets, one for academic literature identified in Scopus and SocIndex and one for reports retrieved from DERE. Both question sets had two categories to generate tendencies on ‘the role of (organisational) learning’ and ‘main findings of methodological barriers and challenges to M&E’ (see appendix 3), The first category holds the findings from each article and report on learning strategies, while the other category comprises tendencies of barriers and challenges to the evaluation approach. Thus, the five sections in the findings-chapter each holds a tendency that was dominating in both the academic literature and in the evaluation reports.

It was chosen to adapt the analytical review system by developing two different question sets. This was done because the two categories are different in structure and aim, but also because they are collected with the purpose to answer different components of the research question.

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<sup>3</sup> SB2) *How is learning as a strategy incorporated in M&E approaches?*

Data for answering sub-question 1<sup>4</sup> was collected through the main findings of methodological barriers and challenges to M&E in the academic articles and in M&E reports. Answering sub-question 3<sup>5</sup> was based on the recommendations proposed in the evaluation reports, and on the main findings of the academic articles.

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<sup>4</sup> SB1) Which challenges exist for M&E approaches?

<sup>5</sup> SB3) How can the development sector strengthen WEGEIs and reduce the challenges identified in previous sector-wide reviews?

### 3. Research limitations and methodological challenges

This chapter comprises a discussion of the research delimitations and methodological challenges and concerns, divided into three sections. The first section regards subjectivity and biases in the context of literature reviews, while the second section examines the conceptual discrepancies and their implications for the research. Thirdly, a section presents the delimitations and scope of the research.

#### 3.1 Biases and subjectivity in literature reviews

Subjectivity inherently exists in all review processes, making it essential to be aware of its existence in order to reduce the invalidity that it potentially creates. It can be a subjective process to choose a method and hence deem whether that method is adequate in answering a research question (Hagen-Zanker & Mallett, 2013; Whitemore et al., 2001). This means that subjectivity is inevitable in the initial stages of a research process and it is thus important to argue for the advantages and challenges of the chosen method to increase transparency and validity.

Traditional literature reviews are critiqued for being “*too restricted to literature already known to the authors, or literature that is found by conducting little more than cursory searches*” (Mallett et al., 2012: 447). Systematic reviews, on the contrary, include all data available within the research field and can reduce the implicit personal biases. There is potential bias connected with choosing data in the retrieval stage of traditional reviews, as we tend to prefer authors that we know and include the articles that we have access to (Hagen-Zanker & Mallett, 2013). This highlights the importance of transparency. Despite the review method and the extent of the scope, the research process must be as rigidly described as possible, making it possible for a researcher to duplicate the process and end up with roughly the same data, and hence develop findings comparable with the ones in the original research.

To study the field of WEGEI requires both flexibility and adaptation of methods, which is why following a traditional review method rigidly is inadequate in this context. This is caused by both the conceptual and operational ambiguity of women’s empowerment, as discussed in chapter 4. ALNAP proposes an approach to systematic reviews in the context of international development that adheres to the principles of the original systematic review method, but simultaneously allows for flexibility; hence combining the core strengths of both review

methods. Thus, the method applied in this research is adapted from the ALNAP approach, but adjusted to this research.

It is not a bias-free exercise to categorise the strength of research, or to assess whether organisations are learning from their interventions, even when the guidelines to do so are straightforward and clear (Hagen-Zanker & Mallett, 2013). Thus, strategies to reduce invalidity from biases, and the methodological challenges, were considered prior to the data collection process. Firstly, the search process including all actions and mid-results, were described in detail. This provides a researcher with the possibility to undertake the same research, which increases transparency. It was additionally chosen to adapt the data collection process to the context of the research field by searching for data through two separate reviews, one aiming at generating academic articles and one comprising evaluations reports. This was done to ensure that the collected data represented both academic research and the organisations implementing and evaluating interventions in practice.

The aim of qualitative research is to make sense of and identify patterns in the data to constitute a meaningful picture without compromising the dimensionality (Leung, 2015). As described in section 2.2.6, it was chosen to base the analytical approach on a qualitative assessment to enhance validity, namely because the conceptual ambiguity complicates clear-cut categorisations. This meant that the reports applied different methods, the recommendations and conclusions were highly context-dependent, and conclusions were described qualitatively. This made a quantitative comparison potentially complex and unsuitable. It would potentially have been possible to develop a classification scheme for both organisational learning, and for barriers and challenges to evaluation approaches, but this was not done caused to lack of time and resource.

It is, however, important to acknowledge that to analyse the data qualitatively was also connected with potential pitfalls. Firstly, the tendency of subjectivity made it important to have a set of formal approaches to analyse both the articles and the reports. Thus, a ‘formal’ assessment strategy was necessary in order not to be blind to contradictory tendencies in reports.

### 3.2 Conceptual discrepancies and terminological ambiguity

The field of WEGE is characterised by discrepancies and terminological ambiguity (see section 4.1), which created challenges for the data collection. Some articles used ‘gender



empowerment’ to cover interventions aiming to empower women, while others used ‘*women’s empowerment*’ to conceptualise the same aim, meaning that some sources treated gender and women as the same concept. The screening stage of the preliminary review showed that the majority did, however, apply the concept of ‘*women’s empowerment*’, which is why this version was chosen as the main concept in the search string, and in the research in general. This was also caused by the fact that many articles on ‘gender empowerment’ referred to western-centred discussions of equality and policies, while *women’s empowerment* tended to focus more on developing countries. Furthermore, some development organisations had also recently redeveloped their policies and strategies on WEGE and hence altered their concepts, which meant that different concepts referred to the same intervention elements, which subsequently contributed to terminological ambiguity.

An additional terminological challenge regards the concept of ‘gender mainstreaming’. As described in section 2.2, results on gender mainstreaming in the preliminary review were mainly focused on organisational policies and less on development interventions. However, it was later deemed necessary to include articles concerning gender mainstreaming as most reports applied the concept in relations to gender equality intervention processes, and as part of the overall WEGE strategy of the organisation. There are indeed differences between interventions directly aiming at empowering women and those seeking to mainstream gender into interventions with other main objectives, but both intervention types are facing the challenge of measuring gender-related change and are hence both relevant to this research.

The sector-wide application of ‘gender mainstreaming’ further means that most development interventions have a gendered dimension incorporated into the objectives. This made delimitation challenging, as excluding mainstreaming articles and reports could potentially exclude otherwise relevant data. Thus, by ensuring that ‘empowerment’ was featured in the abstract and/or the title of the document (criterion 4.1), both for academic articles and for the M&E reports, the aim was to streamline the data generated and to exclude irrelevant articles. This criterion excluded data on interventions that were not directly targeting women as a significant objective, which meant that the articles and reports all regarded women’s empowerment to different extents.

### 3.3 Delimitations

Monitoring and evaluation are distinguished processes that complement each other; monitoring refers to an ongoing measurement process for management purposes, while evaluation can be

defined as a periodic measurement process (Ortiz & Taylor, 2008; Chipato, 2016). This research uses M&E when referring to both activities as part of an intervention process. Thus, the term 'M&E' is applied as a broad reference to all activity related to monitoring and evaluation.

Additionally, this research assumes that there is a relation between enhancing learning and improving the quality of evaluation; thus, efficient learning strategies are believed to increase the successfulness of interventions, namely because learning contributes to identify solutions to the methodological challenges and barriers that persist for M&E. Despite this notion, it is acknowledged that there are other elements and factors determining success in international development organisations, such as technology, financial resources, trust, etc. This thesis confines itself to the relation between enhancing learning and reducing challenges to M&E in the context of WEGEI because not much research has been done on the relation between these two processes, and additionally because learning in development organisations has been, and remains, down prioritised.

Furthermore, the research does not distinguish between different types of development interventions. It is acknowledged that there are large differences between long-term regional programmes and short-term project on a local level, but it was deemed too complex to distinguish these. Thus, this research applies 'WEGEI' (women's empowerment and gender equality intervention) when referring to donor funded and international development interventions, at all levels, that principally, or significantly, seek to empower women with the purpose to promote gender equality.

## 4. Conceptual and theoretical framework

This chapter comprises the conceptual and theoretical framework of the research. The first section discusses empowerment as a concept. The second section accounts for the interconnections between empowerment and capacity development (CD), while the final section presents evaluation approaches to WEGE and CD, focusing on the role of organisational learning.

The first section is meant to support an understanding of the specific barriers and challenges to M&E for WEGEIs, namely because the section outlines the characteristics of the concept. These notions are hence applied in chapter 5 comprising the findings, together with the empirical data. The second section contextualises women's empowerment and capacity development, making it possible to understand how the two development processes are interconnected and face similar challenges regarding learning and evaluations. Capacity development has received great academic attention, and it hence contributes with a deeper understanding of women's empowerment to compare these two processes. The third section aims to conceptualise organisational learning and its characteristics, in the context of WEGEIs, in order to comprehend how it is incorporated into the evaluation reports in the literature review.

### 4.1 Operationalising and understanding 'empowerment'

Empowerment can be defined as a tool to obtain gender equality. However, empowerment is a term that has been conceptualised through a variety of definitions and within various contexts (Scrutton & Luttrell, 2007; Ibrahim & Alkire, 2007; van der Bold et al., 2013; Narayan, 2005). The interpretational ambiguities pose challenges to how development interventions are designed, planned, implemented and measured, and ultimately which impacts they have (van der Bold et al., 2013; Murray et al., 2010; Farnworth & Munachonga, 2010; Freeman & Mikkelsen, 2003). The evaluation of Irish support to gender equality concludes that not all staff members fully understand the concepts related to empowerment and gender equality, which means that they are unsure of how to apply them (Murray et al., 2010), while a second report states that "*there is often no agreement on what to look for, how to measure progress*" (Freeman & Mikkelsen, 2003: 2). Due to these discrepancies, a critical reflection of the concept is necessary, as this likewise increases the transparency of the methodological and analytical choices of the research.

Despite different interpretations and definitions of the concept, there are several overlapping characteristics. It is commonly understood that empowerment takes place on different levels and within different dimensions (van der Bold et al., 2013; CARE, 2010). CARE has developed a prominent framework that defines empowerment as a process aiming to build agency, change relations and transform structures (CARE, 2010; Narayan, 2005). This means that empowerment, as a process, can take place on an individual level, a relational level and a societal level (see figure 4.1). Several scholars and practitioners refer to the 1999 definition of the empowerment concept; *“the expansion in people’s ability to make strategic life choices in a context where this ability was previously denied to them”* (Kabeer, 1999: 437), which focuses on choice, agency and self-awareness, and perceives empowerment as a process. This interpretation can be compared to the definition by Luttrell et al. (2009), defining empowerment as a process in which disadvantaged individuals gain the power to claim their rights, exercise access to resources and participate in decision-making processes. Alsop and Heinsohn (2005) conceptualise empowerment as *“both an outcome, in which a person or group enjoys a state of empowerment, and a process, an action that moves a group or person from a lower to a higher state of empowerment”* (Alsop & Heinsohn, 2005: 52). This research considers empowerment as a process rather than an outcome, as a non-static concept in constant transformation, and as a non-linear process. This understanding necessitates the acknowledgement that the capacity of an individual is dynamic; *“it changes over time, and is subject to both internal and external influences”* (Simister & Smith, 2010: 3). Consequently, this means that an adequate M&E approach for empowerment must be able to grasp the intangible as well as the tangible results.

Additionally, women’s empowerment is argued to be operationalised through two different types of development interventions (van der Bold et al., 2013). Firstly, structural interventions aim at eradicating discrimination against women by improving access to resources and strengthen decision-making through policy interventions, while a second intervention type aims to empower women directly, e.g. through microfinance interventions (van der Bold et al., 2013). This intervention type targets women primarily and has a cross-sectorial nature, as it seeks to empower women economically provided that they adhere to conditions within health and education. Both intervention types seek to empower women, but through different entry points; it can be argued that the first intervention type targets the structures and relations to a higher degree than the latter type, which focuses more on building agency and to a certain extent also to alter relations.



Figure 4.1's CARE's Gender Equality Framework

There is hence consensus that women's empowerment takes place on different levels and within different dimensions, relates to agency and choices, and can be defined as both a process and an outcome with a cross-sectorial nature.

## 4.2 Capacity Development and WEGE

Capacity development is likewise a debated concept. Capacity can be understood as *"the ability of people, organisations and society as a whole to manage their affairs successfully"* (OECD, 2006: 4), while organisational capacity refers to *"the capability of an organisation to achieve effectively what it sets out to do"* (Fowler et al., 1995: 3). Capacity development can therefore be defined as an intentional process developing capacities for and by a group of beneficiaries. OECD defines it as *"the process by which people, organisations and society as a whole create, strengthen and maintain their capacity over time"* (OECD, 2010: 2). Therefore, it can be argued that the principles of women's empowerment can be categorised under the wide framework of CD. Firstly, because both intervention types aim to strengthen the capacities of agents, making them capable of initiating change (Otoo et al., 2009) and secondly, because both processes take place at different levels, respectively the individual, the organisational and within the enabling environment (Vallejo & Wehn, 2016).

Consequently, Ortiz and Taylor argue that M&E approaches must be able to assess how an intervention contributes to *"the wider development processes and to sustainable capacity"* (Ortiz & Taylor, 2008: 9) as well as be able to measure the quality of the empowerment process.

Accordingly, Ortiz and Taylor (2008) state that M&E must aim to inform about programming for the purpose of learning. Figure 4.2 illustrates the CD process, which correlates to the empowerment process. Learning mechanisms should ideally be incorporated into this process at all stages (Simister & Smith, 2010), which is discussed in chapter 6.

Accordingly, empowerment and capacity development are processes that both aim to initiate change on different levels and within different spheres. They are contextual, concern behaviour, choices and agency, and this potentially makes them complex to measure. This research thus intends to investigate how organisational learning can be enhanced in evaluation approaches so that future interventions of WEGE can become more efficient in achieving their aims.

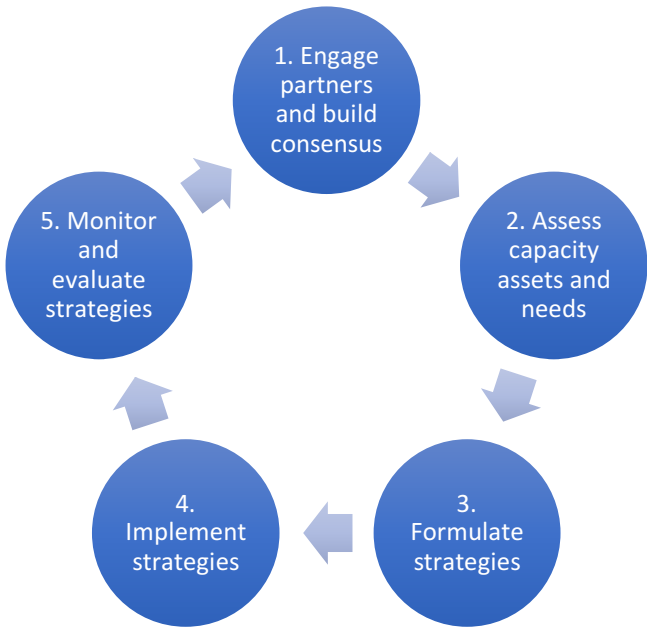


Figure 4.2. The Capacity Development Process (adapted from the UNDP development approach)

### 4.3 Organisational learning and M&E

There are various interpretations of organisational learning in the context of M&E and WEGEIs, but it is possible to identify some overlapping characteristics. Firstly, change and learning takes place in different environments. Otoo et al. (2009) propose a framework aiming to enhance learning from capacity building activities. They argue that learning takes place in three different spheres; the socio-political environment, within policy instruments and organisational arrangements (Otoo et al., 2009). Additionally, learning takes place on different levels; at the agency level regarding capacities of the individual, on the relational level referring to the effectiveness of an organisation and finally, on the level of the enabling environment where norms, policies and practices determine the societal context (Ortiz & Taylor, 2008). This

research predominantly focuses on change within organisational arrangements. Organisational learning can thus be defined as;

*“the purposeful and evolutionary growth of individual and collective knowledge within an organisation that manifests in shared work practice and that ultimately matures into organisational routines and standards”* (Knipfer et al., 2013: 32).

Organisational learning must be built into the organisational structure in order to manifest and for learning outcomes to be prioritised over programmatic accountability results. High staff-turnover, time limitations, scarce financial resources and situational complexity do, however, constrain this prioritisation (Chipato, 2016). This underlines the importance for organisations to develop and implement formal learning strategies.

The role of learning in CD and WEGE processes depends on the evaluation approach, and its capability to capture change within the different levels. This notion fits into the ongoing discussion regarding results-based measurement models (such as the logical framework approach, LFA) versus flexible approaches (e.g. outcome mapping). The LFA can be described as a set of time-bound indicators of achievement that are applied at all stages of the project. Hence, the linear approach structures the elements and highlights the linkages between them (Gasper, 2000). However, the LFA only focuses on intended achievements, which potentially makes the approach a limited tool in evaluating complex and behaviour-based interventions, such as WEGEs (Gasper, 2000). Alternatively, the method of outcome mapping focuses directly on behavioural change and is especially appropriate in the assessment of change at the organisational level (Simister & Smith, 2010). This research discusses the overall complications and challenges for M&E and learning from WEGEs and does not go into depth with the specific evaluation approaches. It seeks instead to investigate the fundamental issues of the evaluation practices and draw conclusions based on the review of these practices.

The extent to which learning takes place at the three levels depends on various factors, for example the adaptive capacities of an organisation to absorb lessons learned and incorporate recommendations into its structure (Samset et al., 1993). Forss et al. (1994) subsequently argue that dominating knowledge structures may facilitate organisational learning, which means that this research seeks to investigate to which extent organisations have such structures implemented. The wide field of different theories and interpretations of organisational learning

are acknowledged, but it is outside the scope to discuss these specifically. Instead, this research investigates how organisational learning is present and strategized in evaluation reports.



## 5. Findings

This chapter presents the findings of the research, divided into six sections. The first five sections each presents a main tendency, while the final section provides a summary. The five main tendencies are derived from the two literature reviews, and represent findings from both the analysis of the academic literature and from the evaluation reports. The first section comprises tendencies related to contextual understandings and gender analyses. The second section presents findings on organisational learning. The third section presents the tendency to triangulate the data collection by mixing qualitative and quantitative methods, and how this works as a strategy to grasp the complexity of measuring empowerment. The fourth section regards participatory evaluation approaches, while the fifth section analyses the time dimension of evaluations. Finally, the sixth section holds a summary of the analysis.

### 5.1 Contextual understanding as a prerequisite for empowerment

It was identified in the academic literature and in evaluation reports that contextual understandings function as a prerequisite for successful designing, planning, implementation and evaluation of WEGEIs (Pereznieto & Taylor, 2014; Heimburger & Ward, 2008; Buvinic & Furst-Nichols, 2014; ICAI, 2012). It was highlighted in evaluation reports that gender, norms and culture differ depending on the context and that assumptions about these must be thoroughly investigated and analysed when designing and evaluating an intervention (Heimburger & Ward, 2008). This notion is in line with the characteristics of empowerment, as presented in chapter 4.

In the academic review, developed by Pereznieto and Taylor (2014), it was identified that 25 per cent of the 254 evaluations scrutinized, undertook a gender analysis. This corresponds with the findings of this research, as academic articles often explain that learning from evaluations cannot take place without context-specific gender analysis (Littlefield & Roberson, 2005). The review of the evaluation reports made it possible to identify that gender analyses at the project design and in the evaluation stage are lacking, as explained below.

The importance of undertaking gender-specific analyses of the political, economic, cultural and social context was thus emphasised as a prerequisite for gender-specific interventions, both by the academic literature and the evaluation reports. However, both literature reviews made it evident that several organisations do not prioritise these analyses, and several evaluation reports criticised the absence of context and gender analyses (Pinder, 2005; Netherland's MFA, 2015a;

Etta et al., 2013; NCG, 2011; COWI, 2006a; Glass & Doocy, 2013; DevTech Systems Inc., 2005; Hjálmarsdóttir & Kharono, 2013). A 2015 evaluation report inferred that gender analyses have been a rare phenomenon and that the insufficient attention paid to gender issues in interventions hinders M&E, and thus also organisational learning mechanisms (Netherlands MFA, 2015a). The same tendency is apparent in the 2008 CIDA evaluation of its policy on gender quality;

*“while CIDA’s GE Policy calls for systematic inclusion of gender analysis in the Agency’s initiatives, the file review found that a significant portion (one quarter) of directive and responsive investments do not include gender analysis at the design and planning stages”*

(Bytown Consulting & C.A.C International, 2008: 10).

Furthermore, an evaluation report assesses how the European Union (EU) supports gender equality and women’s empowerment in partner countries and infers that the current evaluation system is weak. The report argues that this undermines the ability of the EU and other donors to meet commitments when it comes to promoting women’s empowerment for achieving gender equality (COWI, 2015).

Several evaluation reports highlighted the fact that the ‘one-size-fit-all’ approach does not apply to all interventions, especially in the context of women’s empowerment, gender equality and capacity development (Johnston, 2005; Netherlands MFA, 2015a). This underlines the importance of contextual understanding through gender analysis of the different levels in which empowerment takes place. *“Context matters – awareness of these context-specific differences is essential and reconfirms the importance of contextualised gender analyses when preparing interventions”* (Netherlands MFA, 2015b: 21).

The academic literature too emphasised the importance of contextual understandings. Two academic articles highlight the positive relation between high-quality gender analyses and enhanced organisational learning. Bishop and Bowman argue that it is commonly agreed that to strengthen a contextual understanding through analyses leads to a more adequate M&E approach, which ultimately enhances learning (Bishop & Bowman, 2014). Littlefield and Roberson (2005) argue that programmes must be adapted to the context and fitted to the enabling environment for learning to take place.

The evaluation reports further discussed different approaches of gaining contextual understandings. One approach is based on the application of gender-sensitive indicators, as proposed in an evaluation report developed by Hunt and Brouwers (2003). They argue that only a few evaluations apply gender-sensitive or gender-specific indicators, but those that do have a higher quality of gender analyses. This means that they tend to include more information on the context-specific conditions and benefits for women (Hunt & Brouwers, 2003). However, several evaluation reports identified that gender-specific indicators are often absent (COWI, 2006a; NIBR, 2005a; Peebles et al., 2015; SDC, 2009; Italian MFA, 2015; Holzaepfel & Paul, 2013). Evaluation reports often blame this on a lack of baseline data (COWI, 2006a; Santillán et al., 2004; Schüler, 2006), or an under prioritisation from stakeholders and decision-makers. Another common approach to gain contextual understandings, which is proposed by an evaluation report, is through participatory evaluation approaches. This approach proved to ensure the implementation of gender analysis and hence contribute to a contextual understanding, according to the 2003 OECD evaluation (Hunt & Brouwers, 2003). This is discussed further in section 5.4.

## 5.2 The operationalisation of organisational learning

The review of evaluation reports indicated that organisational learning takes place to a limited extent, and that this limitation is caused by the absence of formal learning strategies within the organisations planning, designing, implementing and evaluating WEGEIs (Watkins, 2004; Murison, 2005; Rose & Subrahmanian, 2005; Edbrooke & Peters, 2005; Waterhouse & Neville, 2005; Netherland's MFA, 2015a; Etta et al., 2013; Jensen, 2006; NIBR, 2005a; Netherland's MFA, 2015b; COWI, 2006a; Norad, 2006; Jersky et al., 2016; Byron & Örnemark, 2010). Furthermore, the findings from the two literature reviews made it possible to infer that there is recognition of the importance of learning, but subsequently an acknowledgement that learning strategies require comprehensive resource allocations (Johansson de Silva et al., 2014). The latter was especially evident in several evaluation reports.

The academic literature is subsequently emphasising the importance of learning. Batliwala argues, in an article examining evaluation approaches to WEGEIs, that "*M&E is most useful and relevant when it is approached as a learning process, rather than a reporting or fundraising requirement*" (Batliwala, 2011: 4). The article states that the ideal aim of M&E is to internalise habits of learning systematically, and secondly, to articulate results for sharing best practices. This means that not only donors gain insights into the results, but also external stakeholders interested in best practices. The findings of the review of evaluation reports

inferred that it was possible to detect a recognition of the importance of learning from past interventions to improve the practice. However, limited motivation to prioritise the implementation of learning strategies was identified. The same conclusion was found in two academic articles, each stating that learning strategies are under-prioritised regardless of the sector-wide emphasis on the importance of learning from evaluations (Jersky et al., 2016; Pereznieto & Taylor, 2014). This is in line with a third academic article, developed by Carter et al. (2014), arguing that accountability is currently the dominant purpose of M&E systems. They critique this trend by stating that institutional learning as the main purpose must be prioritised to make sure that M&E systems actually support the empowerment of women. The academic field, in general, argued that evaluation systems tend to serve three main functions; accountability, steering and learning.

When examining the purpose of the evaluation reports in this literature review, it was evident that most of the evaluation reports had an explicit accountability purpose as the main objective. This means that the purpose was to investigate if, and to what extent, the intervention was following the planned change process. Six evaluation reports did, however, state that a significant objective of the evaluation was to initiate a learning process. The 2004 Danida evaluation emphasises the importance of making the evaluation feed into a learning process (DIIS, 2004), while the 2015 evaluation of Italian support to emergency initiatives in Palestine states that it adopts a dual learning and accountability perspective. This means that the evaluation both accounts for funding purposes and proposes how to share the lessons learned with stakeholders (Italian MFA, 2015). A 2015 evaluation of Belgian support to gender equality subsequently states that it seeks to report on the results to account for the resources needed and secondly to “*learn from the past in order to do better in the future*” (Caubergs et al., 2014: 11). Furthermore, a two evaluation reports emphasise that the evaluation was meant to facilitate a learning process (Byron & Örnemark, 2010; Freeman & Mikkelsen, 2003). A 2012 evaluation of adaptation support to African countries states that it aims to focus on the learning process rather than reporting on the outcomes (Nottawasaga Institute, 2012).

Several evaluation reports further concluded that several organisations experience constraints at the operational level of the evaluation process, which is caused by inefficient learning mechanisms (COWI, 2015) or inadequate M&E approaches (Porter & Sweetman, 2005; Gayfer et al., 2012). This makes it possible to argue that to under-prioritise learning strategies can lead to low-quality interventions, which emphasises the relation between efficient learning strategies and high-quality interventions. This was proposed by the academic literature as well (Batliwala,

2011). A comprehensive evaluation of DFID's support to gender equality in development interventions concludes that learning mechanisms remain weak within the organisation;

*“much more could be done by sharing and learning from existing experiences and adopting a more coherent and high profile political stance on the importance of addressing gender issues”* (Waterhouse & Neville, 2005: 19).

Another DFID-evaluation report infers that limited monitoring takes place within the programme, which means that learning is not being *“ploughed back into the management of the programme in order to improve or change implementation”* (Etta et al., 2013: 8). A similar tendency is evident in another DFID-evaluation stating that; *“ways are needed to measure the impacts of complex, multi-sector and longitudinal interventions (...) to feed into an overall learning”* (Edbrooke & Peters, 2005: 2). This means that a few evaluation reports did propose specific strategies on how to operationalise learning and implement the proposed recommendations into the intervention.

Learning from examples and narratives can, for example, work as a strategy to incorporate learning processes, as presented in a 2015 evaluation stating that the case examples highlighted in the report have been selected to *“maximise the lesson-learning opportunities from the evaluation”* (COWI, 2015: 10), which means that learning can be maximised through storytelling (Ortiz & Taylor, 2008). However, the evaluation still lacks a strategy on how to incorporate the results into the organisation. This relates to an additional tendency limiting learning processes in evaluation reports; the fact that most evaluation reports were developed without guidance on who should read the report, how it should be read and how the findings are meant to inform future interventions. This means that the reviewed reports had specific aims, but rarely comprised a strategy of how the results and recommendations should guide future interventions. It is therefore possible to identify certain discrepancies between what is emphasised by the academic literature as important for learning, and what is exercised in practice, as described in the evaluation reports.

### 5.3 Mixing methods to grasp complexity

The review of the 64 evaluation reports identified that some M&E approaches were not able to capture the results of interventions, which may indicate that the evaluation system in place was not adequate in capturing the changes created (COWI, 2006b). One evaluation report concluded that it was *“impossible to ascertain gender impact because this study was a desk review that*

*cannot capture the effects of such processes*” (COWI, 2006b: 6). This does not necessarily mean that the intervention is without effect, but rather that the M&E approach is inadequate. This might relate to the fact that there are no *“agreed measures of empowerment, partly because it is used in many disciplines at different levels of analysis, with varying intent”* (Spry & Marchant, 2014: 35). Both academic articles and evaluation reports emphasised that mixing qualitative and quantitative methods is the most adequate approach to grasp the complex impacts of WEGEIs (Carter et al., 2014; COWI, 2015; Perezniето & Taylor, 2014; Norad, 2006). This notion is often based on the understanding that qualitative or quantitative methods alone are insufficient in capturing empowerment impacts. On the one hand, an academic article argued that qualitative tools for M&E allows for a more nuanced understanding of change, but *“the way in which qualitative information is collected can also be criticised in tending to highlight successes rather than failures”* (Carter et al., 2014: 341). On the other hand, an evaluation report argued that relying M&E on qualitative interviews can, potentially, reduce validity because of the personal biases that are inherently present;

*“there is a permanent danger of being given biased information. The danger stems from a belief among respondents that the benefits they enjoy through the evaluated programme may be in peril if they do not answer unequivocally positively”* (NIBR, 2005b: 11).

This means, according to the NIBR evaluation report, that answers to the questions posed by the interviewer might be predisposed by the extent to which the respondent would like the intervention to continue, rather than how the intervention functions, which potentially reduces validity (NIBR, 2005b). Two academic articles argued that quantitative tools alone are, on the contrary, neither able to capture empowerment impacts to a sufficient extent (Bishop & Bowman, 2014), namely because empowerment is not directly observable and therefore difficult to measure (Carter et al., 2014). Also, self-perception and changes on the agency-level is challenging to quantify;

*“where no evidence of change was detected, it tended to be in those (quantitative, eds.) indicators linked to issues at a more personal or household level, such as women’s involvement in household decision-making and attitudes towards gender roles in the household”* (Bishop & Bowman, 2014: 259).

Bishop and Bowman thus indicates that self-perception and factors within the agency-level are not adequately captured through quantitative indicators. Another academic article subsequently

argued that quantitative studies are less likely to include a holistic and multi-dimensional dimension to women's empowerment (Pereznieto & Taylor, 2014), which they argue is because indicators tend to focus more on economic aspects and less on self-perception and decision-making. In the academic article by Pereznieto and Taylor (2014), it is subsequently argued that a mixed-methods approach is the most effective in terms of capturing change and outcomes, and that it provides material for learning. Almost all evaluation reports in the literature review applied both qualitative and quantitative tools to evaluate interventions (see appendix 3). It was additionally emphasised by the academic field that besides mixing qualitative and quantitative methods, it is important to reflect upon which data collection tools, methods and approaches generate which results. Carter et al. (2014) argue that different tools stress different aspects of empowerment;

*“we take the four dimensions of empowerment (...) and consider the degree to which these are captured through quantitative and qualitative monitoring and evaluation systems. The main finding is that quantitative methods stress aspects of power-to, whilst qualitative methods have potential to provide insight into a broader range of outcomes and impacts”* (Carter et al., 2014: 327).

This notion underlines the academic perception of the empowerment concept; namely that it is multifaceted and takes place on different levels. An additional issue relating to quantitative tools regards the use of indicators and whether these are adapted to the gender equality agenda. Several evaluation reports argue that indicators are not suitable in capturing change, as they are not context nor gender-specific (COWI, 2015; Jones et al., 2015; NCG, 2011). The 2015 evaluation report of EU support to gender equality in partner countries states that gender-sensitive indicators primarily are applied in social sectors, and even within these sectors, indicators are not used systematically (COWI, 2015). Additionally, an evaluation of DFID support to gender equality concludes that gender-specific M&E is present to a limited extent. The report argues that this is caused by the lack of gender-specific indicators, which means that the system in place to track progress were not able to capture gender-related change (Jensen, 2006).

The 2015 evaluation of the policy on women's rights and gender equality in the Netherlands also detected weaknesses in the design of the results framework, caused by unsuitable indicators that were not specified to the context; *“gender specific indicators that go beyond activity/output level for the final beneficiaries are lacking”* (Netherlands' MFA, 2015a: 19). Pereznieto and

Taylor (2014) propose to adequately measure gender-specific and transformational change by ensuring that indicators are based on the contextual analysis, which again underlines that the five main findings are interconnected. Based on the findings from the literature, the evaluation reports and from the characteristics of empowerment (chapter 4), it is possible to argue that adapting an evaluation approach to a specific intervention necessitates quantitative indicators and qualitative assessment tools that are based on a contextual gender analysis.

#### 5.4 Participatory approaches to M&E

Several evaluation reports proposed to base evaluations on participatory approaches (Freeman & Mikkelsen, 2003; Netherland's MFA, 2015b; IED/ADB, 2010). The arguments for doing so were often based on three notions. Firstly, participation is a cornerstone within WEGEIs and CD. Secondly, participation ensures local ownership and thirdly, because participation increases contextual understandings of the socio-political and organisational environments. Also, "*gender equality and participation are closely linked, since increased participation of women (...) is one pre-condition for pursuing empowerment*" (Freeman & Mikkelsen, 2003: 8). Participatory approaches are hence emphasised by evaluation reports in cases where the aim is to establish partnerships with local organisations to ensure contextual understanding of the environments;

*"the building of long-term partnership with the local organizations helped to ensure a proper analysis of the priorities and needs of the population, to give continuity to those actions and to improve the sustainability and the transfer of knowledge and experiences"* (Italian MFA, 2015: 69).

One evaluation report proposes to decentralise M&E to local partners and stakeholders to increase responsibility and local ownership; "*the focus of learning (...) needs to move out from the centre (...) and to field level in particular*" (Williams, 2011). Furthermore, the 2003 OECD/DAC review of best practices to evaluate interventions with gender equality objectives concludes that participatory approaches ensure contextual understanding through gender analysis (Hunt & Brouwers, 2003). It is therefore possible to infer that participatory approaches can enhance the quality and depth of the contextual understanding, which potentially enables a reduction of the impacts of the challenges presented in 5.2. Further, this entails to allocate evaluation responsibility to local agents to promote sustainability of the intervention, and to ensure that the evaluation incorporates local perceptions and contextual understandings.



It was emphasised by the academic literature that participatory approaches have an empowering capacity. Urdang, for example, argues that local participation is an exercise of power from below, which means that it has an empowering dimension (Urdang, 2006). The same tendency is evident in an evaluation from 2011 concluding that only a few of the INGOs involved in the intervention had good systems in place for building evaluation capacities for local partners. The report thus recommends stakeholders to “*explicitly improve information flows to and from local partners by involving them in all aspects of programme design and implementation*” (NCG, 2011: 16). The report further proposes that partners pursue to disentangle the issues of ownership, as this enables an understanding of whose ownership is important for which change process (NCG, 2011), which further enhances participation and contextual understanding.

### 5.5 The time dimension of M&E

The theoretical framework (chapter 4) described the discrepancies of the empowerment concepts. These interpretational differences mean that there is an on-going debate regarding whether traditional empirical measures of empowerment, including quantitative indicators, are meaningful tools to capture the responsiveness of interventions properly (Bonilla et al., 2017). However, there is in general agreement, both within academic literature and within the practical field, that empowerment is a process rather than a state (Bonilla et al., 2017: 2; Perezniето & Taylor, 2014; NIBR, 2005a; Woroniuk, 2014: 2; Freeman & Mikkelsen, 2003). It is possible to argue that this entails that evaluations focus on long-term impacts to capture the effects of interventions, namely because outcomes and impacts change over time. This is often not possible for resource scarcity reasons, which means that evaluation processes tend to focus on visible changes and short-term outputs (Ortiz & Taylor, 2008). This is evident in an evaluation report by the Netherland’s MFA; “*evaluations take place right before or just after the implementation of projects, whereas fundamental change in gender inequality takes much longer to materialise*” (Netherland’s MFA, 2015a: 19).

It is hence important to consider the time span of interventions prior to planning the M&E strategy, as it determines when and how empowerment processes ought to be measured and tracked. It is often a luxury to have the possibility to undertake frequent and long-term evaluations for interventions, but this must be prioritised if the aim is to properly track the impacts of empowerment.

One evaluation report argues that short-term monitoring tracking is essential as well, namely because empowerment is a dynamic and complex process; “*performance measures need to*

include short, intermediate and impact indicators to be able to track the effects of policy dialogue within the time frame” (Peebles et al., 2015: 12). Monitoring can therefore contribute with an on-going test of the inputs, and in gaining an understanding of which activity elements lead to which outputs. It is hence possible to argue that the complexity of empowerment processes makes it necessary to track results on two levels; immediate and short-term results and the long-term impacts, which is proposed and emphasised by the academic literature (Otoo et al., 2009).

The time dimension relates to the measuring process, meaning whether the evaluation captures outputs, outcomes or impacts. Impact is often more complex to operationalise and measure than outputs and outcomes (Otoo et al., 2009; Ortiz & Taylor, 2008). This is illustrated in figure 5.5 below, demonstrating that there is no explicit proof that outputs and outcomes are directly caused by the input (IEG, 2012), which is why impact analysis is important to investigate. It can hence be argued that impact is important, both for ensuring accountability and for operationalising learning. One academic article argues that attribution, referring to the interconnection between input and impact, is notoriously difficult to demonstrate in the context of WEGEIs and CD, namely because these development processes take place in “non-linear, complex adaptive systems, which demand open learning approaches in order to navigate towards impact” (Ortiz & Taylor, 2008: 29).

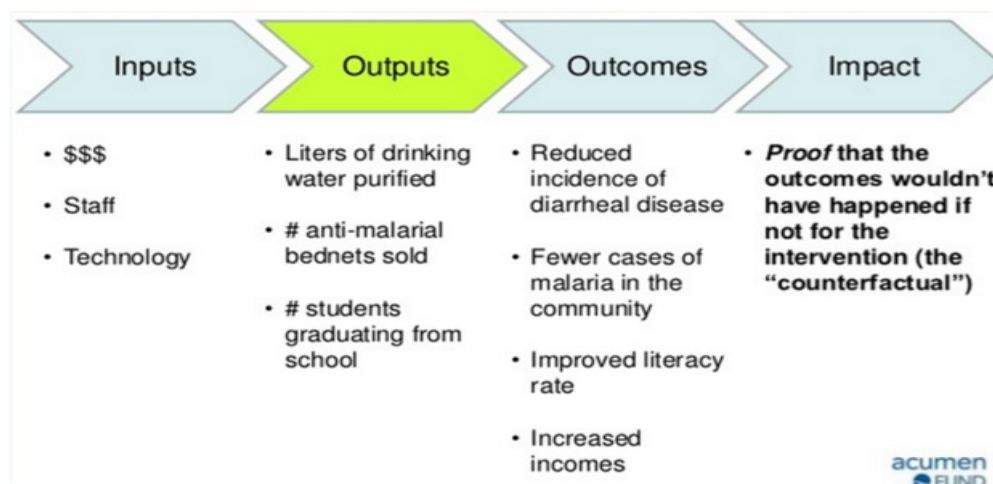


Figure 5.5 The Chain of Causality<sup>6</sup>

Several evaluation reports tend to measure outputs and outcomes rather than impacts (Norad, 2006; Ofori-Bah et al., 2004), while other evaluation reports in the literature review measured

<sup>6</sup> Retrieved from: <https://www.ffwd.org/blog/thoughts/what-tech-nonprofit-startups-and-their-funders-should-know-about-impact-measurement/>

outputs exclusively (Holzaepfel & Paul, 2013; Glass & Doocy, 2013). This meant that in some cases was impossible to determine whether the changes would have happened without the intervention activities (Ofori-Bah et al., 2004). Woodford-Berger (2000) argues that to ignore impact eventually leads to a lack of knowledge on which intervention elements lead to which empowerment changes, which hence can mean that the operational misperceptions of gender concepts will continue to prevail within the sector.

It is, however, important to acknowledge that measuring impact is a complex task, especially in the context of WEGEIs. Certain empowerment indicators might only manifest long after project completion and to capture these requires resource-intensive post-evaluations, as argued by several evaluation reports (Freeman & Mikkelsen, 2003). However, the absence of attribution and impact measures can be deemed as a challenge to evaluating WEGEIs. It can further be deemed as a barrier to organisational learning, namely because it inhibits an understanding of which intervention activities and inputs lead to which changes.

## 5.6 Summing up

The five sections each comprises a main tendency relating to the barriers and challenges facing the practice of evaluating women's empowerment and gender equality interventions. Firstly, the importance of contextual understanding and analysis of the enabling environment is emphasised by the academic articles, as well as the evaluation reports, and it is subsequently identified that such analyses rarely take place in practice. The second main finding regards organisational learning strategies and highlights the few examples that did incorporate such strategies. Thirdly, the notion of mixing quantitative and qualitative methods was presented and the data indicated that most WEGEI evaluations did implement a mixed-methods strategy in practice. It was, however, not possible to investigate to which extent. The fourth section regards participatory approaches to evaluating empowerment, which is emphasised in academic literature but rarely undertaken in practice. Finally, the fifth finding considered the time dimension of evaluations and it was inferred that women's empowerment should be treated as a process that needs to be evaluated with both short-term and long-term tools.

It is, based on these findings, possible to infer that an ideal approach to evaluate WEGEIs is context-specific, suggests specific strategies for learning, is based on a mixed-methods approach, is undertaken with local participation, applies both short-term and long-term tracking systems and captures impacts.

It was highlighted in several reports how organisations had failed to act on previous assessments identifying similar weaknesses, which might indicate that organisations have weak abilities to learn from previous evaluations. Furthermore, it is possible to infer that the five findings identified largely correspond to the weaknesses presented in the 2000-Sida report presented in the first chapter<sup>7</sup>. The first recommendation in the Sida-report regards adoption of participatory approaches, as proposed and discussed in section 5.4. The second recommendation largely corresponds to section 5.1 concerning contextual understanding and local gender analysis, while the third, fourth and fifth recommendation calls for an overall improvement of M&E guidelines and approaches.

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<sup>7</sup> *Five recommendations: “1. The adoption of more participatory approaches in overall programming, project design and implementation, 2. Better knowledge of local culture, conditions and perspectives, 3. The development and dissemination of evaluation guidelines and methodologies to improve the quality of discussions and assessments of gender issues in evaluations, 4. Improvement in the quality of evaluations and in the assessment of effects and impact with regard to gender equality and women’s empowerment, among other things through improving the availability use of sex-disaggregated data and, 5. Better attention to issues of gender equality and women’s empowerment in evaluation Terms of Reference and increased competence on evaluation teams.” (Woodford-Berger, 2000).*

## 6. Discussion

The findings presented in the previous chapter make it possible to argue that WEGEIs are less quantifiable than traditional infrastructure investments, namely because their aim is to develop individual, organisational and social capacities. This means that approaches measuring their results must be able to capture dynamic processes and relational changes that are potentially unpredictable and intangible (Graham & Pettinato 2005; Malhotra et al., 2002; Uphoff 2005; Carter et al., 2014; Cornwall, 2016). M&E of WEGEIs should thus contribute to understand the effects of interventions, inform organisational management processes and enhance adaptive learning. The findings presented in the previous chapter made it possible to infer that several elements contribute to the applicability of evaluation approaches. These elements have in common that they are complex to implement, and require resources to be applied in practice, which are reasons to why the practice of empowering women and promoting gender equality continuously faces challenges.

### 6.1 Enhancing learning through three approaches

The findings indicated that there is a willingness to improve M&E systems and to enhance learning, but it was subsequently indicated that enforcement remains weak. The following sections thus seek to propose and discuss three approaches aiming to enhance learning and decrease challenges to M&E of WEGEIs. Firstly, a section discusses how increased collaboration, coordination and knowledge-sharing through networks strengthen learning. The second section discusses approaches to enhance the enforcement of learning strategies; hereby moving towards a ‘culture of learning’. The third and final section discusses how organisations can mainstream learning while decentralising M&E to the local level, involving local partners to ensure participation and ownership of intervention processes.

#### 6.1.1 Disseminating knowledge in networks

Several M&E reports highlighted the importance of coordination and collaboration with partners and stakeholders (IED/ADB, 2010; Macdonagh, 2005; Glass & Doocy, 2013). It was repeatedly recommended to collaborate through networks with civil society actors, national authorities and local stakeholders to champion a process of sharing best practices and lessons learned. This notion was, for example, emphasised in the 2005 evaluation of DFID support to WEGEIs, emphasising how the organisation ought to disseminate knowledge within the institution and across the region;

*“DFID could play a valuable role in collaborating with others to enhance global and national statistical information and capacity (...) by disseminating materials, holding seminars, facilitating project staff to attend policy meetings and seeking to replicate it in other regions” (Murison, 2005: 3).*

A second DFID evaluation proposes that the institution establishes a pool for sharing gender practice and expertise to enhance the integration of empowerment and gender equality with other stakeholders in the region (Johnston, 2005: 2). The systematic reliance on such a pool, or network, could potentially contribute in making interventions more efficient, namely because it increases synergy with partners and provides an arena for information sharing on what works and what does not. It further strengthens a policy dialogue in addressing gender issues and may also increase the sharing of gender analysis data and the application of gender-aggregated indicators (IED/ADB, 2010). A learning network can therefore reduce several of the challenges and barriers identified in this research.

Efficient learning pools, and collaboration through networks, were highlighted as a main reason to why DFID was deemed at the forefront of gender sensitive development. The organisation *“plays an active role in influencing results and engaging in dialogue on gender equality and women’s empowerment through partnerships”* (COWI, 2006a: 10). Glass and Doocy (2013) recommend increasing collaboration and coordination among the various stakeholders to improve the refugee program in Uganda, while several evaluations recommended to review the terms of engagement with partners to ensure closer ties and strengthened relationships internally and externally (Nottawasaga Institute, 2012; Byron & Örnemark, 2010). ADB additionally proposes to engage more fully with in-country gender networks as it provides *“opportunities to exchange ideas and share experience”* (IED/ADB, 2010: 4). It is therefore possible to argue that such networks potentially generate knowledge dissemination and enhance learning from one organisational level to another.

To create a learning pool requires an understanding of how knowledge is generated within and between organisations, which relates to the societal levels in which empowerment and learning take place (as described in chapter 4). There is hence a need to assess variations in methods, systems and processes within different levels in order to generate, and share, best practices. This means that the international policy level has a direct channel to learn from operations at the local level, which initiates a move towards a bottom-up approach. Such an approach does not only ensure partnerships and local ownership, but contributes with an increased contextual

understanding of the intervention environment. To enable system agents to learn from each other requires an assessment of how knowledge is generated at different levels in order to establish a strategy.

The DFID evaluation series from 2005/2006 suggest that an evaluation should consider how knowledge generated is being used to inform programmes within countries, which means to investigate how results are disseminated throughout the organisation. Figure 6.1.1 illustrates how this process can take place by emphasising that knowledge ideally should move back and forth between levels, as it is a non-linear and dynamic process.



Figure 6.1.1 Disseminating learning through four levels

One example of how a learning network, or pool, is operationalised in practice is the Irish Joint Consortium on Gender Based Violence (JCGBV). The consortium works as a national learning pool comprising organisations responding to gender based violence (GBV) in international development interventions. This means that the consortium seeks to institutionalise responses to GBV at an inter-organisational level. It has been effective in initiating learning events, and learning resources have been widely disseminated among members (Williams, 2011). The evaluation of the consortium states that its structure is both a challenge and an asset, as diversity of experiences and notions benefits learning, while the challenge stems from accommodating the needs and views of a diverse group (Williams, 2011). The consortium could benefit from further institutionalisation, for example by recruiting a coordinator to support the members in sharing and disseminating lessons learned. It is hence possible to argue that the challenge of the consortium relates to the operationalisation of communication as a tool to enhance learning.

The African Midwives Research Network (AMRN) also functions as a knowledge-sharing network with several member organisations. The evaluation of the network concludes with specific recommendations on how to enhance the impact-potentials of the network. The AMRN has an informal and loose structure, which potentially makes it vulnerable to change and high staff turnover (Forss & Maclean, 2007). Thus, the evaluation report proposes to formalise the network structures through registries and to increase the flow of communication between members.

These two examples of national and regional networks have in common that their informal structure and minimal communication potentially inhibits sustainability. High staff-turnover and funding cuts thus increase the vulnerability of the networks, which means that they become inefficient in disseminating knowledge and promoting learning.

Forss et al. (1994) argue that learning from experience in an organisation can take place through communication or involvement. Learning through communication is often based on written communication, e.g. newsletters and dissemination of evaluation reports. Learning through involvement and participation takes place through seminars and workshops. On the one hand, learning through communication assumes low absorptive capacity of the organisations, it potentially reaches many and requires few resources, but it does consequently have limited abilities to transform the system on issues at the policy level, such as gender equality. Namely, because it has limited abilities to initiate change of the organisational structures. On the other hand, learning through involvement and participation assumes high absorptive capacities and financial resources, and only reaches a few. It does, however, potentially create changes of the existing structures and is therefore a relevant tool in empowering women and promoting gender equality.

Figure 6.1.1.2 illustrates the process of knowledge dissemination within an organisation. Forss et al. argue that sharing knowledge through communication initiates a learning process limited to change within the existing structures. Learning through involvement and participation has, on the contrary, the potential to initiate change of the existing structures, which means that the organisation can adapt to changing conditions and environments.

It is hence important to reflect upon the ways in which learning and knowledge-sharing takes place within a learning network. Communication reaches many, but is not able to transform the system to the same extent as involvement and participation. Thus, a learning pool might benefit from mixing these two knowledge methods by providing network-members with the



opportunity to become involved and participate in learning activities, and to communicate best practices within and across the levels of the learning network.

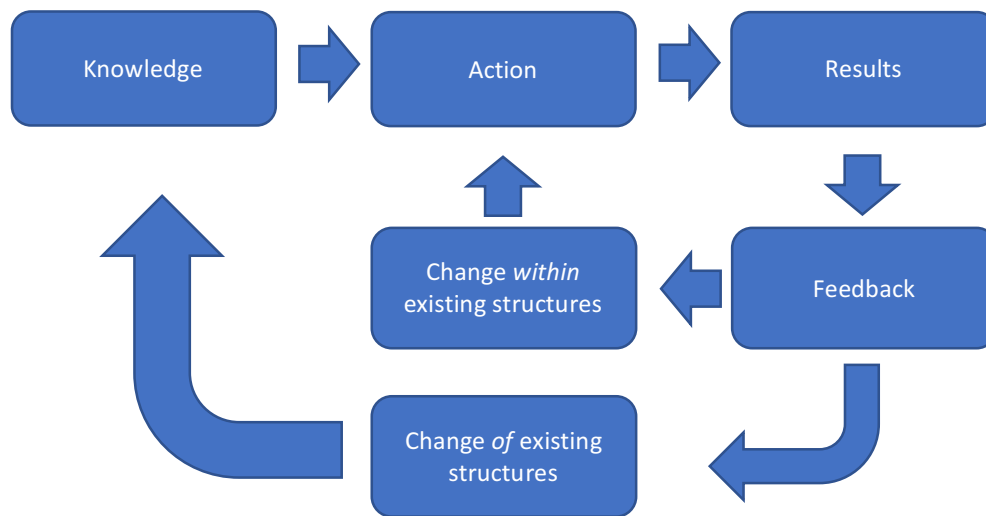


Figure 6.1.1.2 Knowledge structures in organisations (adapted from Forss et al., 1994).

As recommended in the evaluation of the GBV consortium, a learning pool can benefit from recruiting a specialist (Williams, 2011) to support the learning process. This does not only support the learning process in general, but also supports gender analyses and contextual understandings, ensuring that the gendered dimension is adequately implemented.

It is important to acknowledge that to establish learning pools and networks is related to several challenges. It is a logistical challenge, it requires financial resources and engagement and it can be difficult to implement in a sector with high staff-turnover. This means that efficient learning pools depend on the willingness of donors to allocate resources to the purpose, institutionalised learning strategies and formalised learning tools, based on communication and involvement.

### 6.1.2 Strengthening enforcement tools

Based on the findings and the previous section, it is appropriate to infer that there is a sector-wide need to develop strategies and tools able to guide a learning process within organisations working with WEGE. Several evaluation reports stated that learning had not been systematically planned for, documented or shared within the organisation (ICAI, 2012: 1; Byron & Örnemark, 2010). Subsequently, evaluation reports focused more on why the organisations should implement a certain activity or improve a specific ability, and less on the specific method or strategy to do so. This means that most evaluation reports emphasised

learning, but did not propose a specific strategy, which indicates that willingness is high, while enforcement remains weak (Woodford-Berger, 2000; Woroniuk, 2014; Tsegai & Murray, 2005; Freeman & Mikkelsen, 2003).

An evaluation of Austrian support to WEGE concludes that *“the relevance of the gender policy document itself appears to be rather limited (...) staff do know it, but do not use it for providing guidance for their work”* (von Braunmühl et al., 2012: 2). This point was evident in several reports stating that a gender policy document, without specific enforcement requirements, was inefficient and did not promote learning. In line with this is the fact that several organisations submit reports to the management, but these reports are rarely used in practice to improve the intervention, even in cases where clear deficiencies are identified (Norad, 2006). These points relate to the above notions on knowledge dissemination through communication and involvement, as evaluation reports and policy documents are not sufficient without proper involvement and enforcement tools. This is further in line with the DFID evaluation series, stating that an evaluation should not end as soon as the final report has been developed and presented. Instead, an evaluation report should contribute to learning processes at different levels *“for example through delivery of short seminars and discussion groups, and drafting of guidance notes for staff of all disciplines”* (Pinder, 2005: 46), which again emphasises that efficient and adaptive learning takes place through both communication and involvement.

To base enforcement tools on communication, involvement and participation entails that the sector shifts its focus away from accountability and towards adaptive learning. Such a shift will consequently lead to *“a vibrant expression of organizational and individual learning and growth, and a critical contribution to the collective learning”* (Batliwala, 2011: 4). This means to move away from viewing M&E as a tool for accountability for donors, and view it as an instrument for enhancing learning instead. It is further possible to argue that promoting a culture of organisational learning is a tool to strengthen the focus on stronger enforcement. A Sida report from 2003 has the main objective to promote learning, which means that the evaluation was based on ‘a spirit of learning’, which has:

*“influenced the process to a higher degree than what the evaluation team has experienced in previous evaluations. There were many expressions of this: a) Frequent exchanges of lessons between the evaluation team and stakeholders within and outside Sida in Sweden, b)*

*Application of participatory methods for data collection and analysis to the degree possible, and c) Participation of UTV<sup>8</sup> in one country study” (Freeman & Mikkelsen, 2003: 23).*

Ortiz and Taylor (2008) recommend implementing learning approaches through the organisational culture, namely because increasing the focus on learning is more cultural than procedural; *“learning-based organisational cultures translate into a more effective conception, design, implementation and evaluation”* (Ortiz & Taylor, 2008: 38). This focus necessitates the acknowledgement that learning takes place in both formal and creative settings. Several organisations working to promote internal learning state that learning activities and outcomes are not predetermined, but must be contextually formed and staff-driven. This entails that organisations move away from bureaucratic evaluation systems to learning-based organisational systems that promote adaptive management (Ortiz & Taylor, 2008).

The Asian Development Bank (ADB) evaluation from 2010 concludes that the focus for future interventions should be to *“effectively train operational staff, sensitize them to gender issues, and directly support operations”* (IED/ADB, 2010: 7). This is related to promoting a culture of learning, and to change existing structures, as it is an attempt to adapt the organisation to the reality in which it operates. Section 4.1 regarded the conceptual ambiguity of the empowerment concept, which has resulted in a confusion of how to operationalise it. It is therefore possible to argue that to train staff, and sensitise them to gender issues, is an enforcement tool aiming to reduce the ambiguities of women empowerment and gender equality. This consequently reduces the discrepancies of tools and practices of WEGEIs and enhances the contextual understanding (Byron & Örnemark, 2010).

To strengthen enforcement tools and promote a culture of learning require resources and engagement. This means that impacts might be impaired by the limited resources that gender-specific staff is currently equipped with, unless donors acknowledge the need for financial allocation for learning purposes and efficient evaluation tools and strategies. It is finally possible to infer that a learning strategy based on strong enforcement needs to include sufficient and sound tools based on communication, involvement and participation.

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<sup>8</sup> The Department for Evaluation and Internal Audit in Swedish International Development Cooperation Agency (Sida)

### 6.1.3 Mainstreaming learning through decentralisation

Based on the notions above, it is possible to argue that learning is limited when it takes place in an organisation isolated from the rest of the intervention network. Forss et al. (1994) argue that learning through involvement necessitates participation of all stakeholders, which emphasises a decentralised approach to M&E. Following this notion, local partners must be involved in the evaluation process for two main reasons. Firstly, because it is commonly understood that local ownership of intervention activities increases sustainability (Byron & Örnemark, 2010; Freeman & Mikkelsen, 2003) and secondly, because research indicates that participation of those responsible for implementation at the local level in developing M&E leads to a higher rate of implementation (SDC, 2009).

It is therefore possible to infer that sustainability is at risk when local ownership is under prioritised. Geut (2015) argues that it is unlikely that small community-based organisations continue to implement project activities after funding has stopped; “*socio-cultural sustainability of the ‘changed discourse’ and ‘changed attitudes’ is at risk*” (Geut, 2015: 14). A tool to ensure the sustainability of projects at the local level is therefore to involve a broader consortium, or network, of local organisations and communities, as this increases local ownership. Further, the structure and the communication channels of such networks need to be formalised and locally driven in order to ensure sustainability.

The evaluation of the JCGBV, introduced above in section 6.1.1, states that the responsibility of evaluations and organisational learning processes need to move out of the centre of the consortium and into the local level (Williams, 2011). Following this notion, learning is more likely to take place if evaluation is decentralised and different stakeholders are involved in the process. This subsequently provides local implementers with responsibility and ownership of the evaluation and learning processes. To involve several stakeholders in the M&E processes of an intervention can potentially contribute to a mainstreaming of learning. Gender mainstreaming and learning mainstreaming can be viewed as pluralistic approaches that promote the assessment of implications for developing learning in a given intervention or policy. To promote such a mainstreaming culture thus entails that the sector of WEGEIs consider possibilities and implications for learning in all areas of the planned intervention. It is, however, important to acknowledge that mainstreaming learning is resource-intensive and requires financing, as well as engagement, from donors and agents in all levels of the intervention cycle.

## 7. Conclusion

This research sought to identify the challenges that exist for efficient evaluation approaches, to understand how organisational learning is strategized and operationalised by the organisations and institutions carrying out evaluations and finally, to discuss how the WEGE sector can reduce these challenges and strengthen organisational learning.

The Sida-review from 2000 proposed five recommendations for improving the evaluation practices of WEGEIs. Subsequently, this research identified five tendencies each relating to the methodological barriers challenging the same practice. It is evident that several points presented in both studies overlap, especially in terms of emphasising participatory approaches, underlining the importance of contextual understandings, as well as improving the quality and efficiency of the evaluation practices.

Conceptual ambiguity and terminological discrepancies pose fundamental challenges to the evaluation practices of WEGEIs. This thesis identifies how the WEGE sector emphasises the importance of promoting the WEGE agenda, but often lack a fundamental understanding of what it means to empower women in a strategic and operational way. The field of WEGE is characterised by complex concepts and their use is continually subject to debate amongst both researchers and practitioners. This makes it necessary to establish a common understanding of these terms, as well as of their strategic use. It is therefore possible to infer that it is challenging to determine whether WEGEIs are creating the intended changes without a more operational understanding of what it means to empower women.

Overall, the conclusions of the evaluation reports proved remarkably similar across thematic areas, organisations and time periods, which indicates that learning processes remain insufficient; namely because the same critique persist despite comprehensive evaluation reports and recommendations on how to improve interventions. It was identified in this research that this is partly due to the complexity of translating outcomes across different social, political and economic contexts, but is also due to a resistance to allocate funding to M&E, and learning in particular. Donors need to acknowledge the fact that WEGEIs will not improve without an attitude change towards the funding of ambitious M&E systems, aiming to initiate learning and develop adaptive organisations.

This thesis recommends three approaches each aimed at enhancing organisational learning. The first approach proposes to increase inter-organisational collaboration through learning

networks, while the second approach suggests formalising enforcement tools and learning strategies. The final approach regards the mainstreaming of organisational learning by decentralising evaluation approaches throughout the intervention network. These approaches entail that the WEGE sector move away from notions of accountability and towards organisational learning. This makes it possible to conclude that the sector-wide weaknesses will persist unless stakeholders start to prioritise learning as a pivotal element of their organisational structure.

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# Appendix 1

The following three appendices includes samples of the review of results from the three databases. For the complete review, please contact author via [e-mail](#).

## SocIndex

ID	Title	Author and year	C1: C	C2: L	C3: L	CA.1: CA	CA.2: Source (Journal)	J	K
1	Still learning: a critical reflection on th Bishop, D. And Boy Yes	Yes	Yes	Yes	Yes	Yes	Gender and Development	Purpose and/or aim	Data collection meth
2	Learning about women's empowerment Carter, J., Byrne, S. Yes	Yes	Yes	Yes	Yes	Yes	Gender and Development	The article examines the Women's Em Literature review	
3	A review of approaches and methods Perenziato, P. And Yes	Yes	Yes	Yes	Yes	Yes	Gender and Development	The review aims to inform al. Meta-evaluation	
4	Using the Social Relations Approach t Hillenbrand, E. Lak Yes	Yes	Yes	Yes	Yes	Yes	Gender and Development	This article frames a baselin Case-study/evaluatio	
5	Improving health service access and w. lersky, M., Titmuss Yes	Yes	Yes	Yes	Yes	Yes	Australian and New Zealand . To evaluate an urban art-ba: Mixed methods: qual		
6	Enabling Women's Agency: Arab Worr Underwood, C. An Yes	Yes	Yes	No	No	No	Women & Therapy	To examine the outcomes of Mixed methods: qual	
7	Treatment Outcomes and Perceived Blafave, L., Desport Yes	Yes	Yes	Yes	Yes	Yes	Women & Therapy		
8	The 'Dual Role' approach: encouragin Gunnel, T. 2008 Yes	Yes	Yes	No	Yes	Yes	Journal of Women and Social	The article presents an eval Case-study/evaluatio	
9	Computer Technology for the Feminis Littlefield, M., and Yes	Yes	Yes	Yes	Yes	Yes	Journal of Community & App	The purpose of this paper is Case-study/analysis c	
10	Philosophical Dialogues as Paths to a Triliva, S. And Dafe Yes	Yes	Yes	Yes	Yes	Yes	Canada Correctional Service	To evaluate the therapeutic: Evaluation/Qualitativ	
11	Program Evaluation of Therapeutic Se Kendall, K. 1993 Yes	Yes	Yes	Yes	Yes	Yes	Canada Correctional Service		
12	'He will ask why the child gets sick so Tolhurst, R., Amek Yes	Yes	Yes	Yes	Yes	No			
13	Culture Specific HIV Interventions for Mcquiston, C. M. 2 No	Yes	Yes	Yes	Yes	Yes			
15	The role of (organizational) learning	Main findings (of methodological barriers and challenges to M&E)							
1	The aim of the article in itself is to enhance learning from the field	It will be a considerable (but potentially inspiring) challenge to Orlan to further improve its current technically rigorous, pragmatically delivered approach in evaluations to come							
2	In this article we set out to examine the 'fit' between the types of data that are collected for the learning and innovation	All three projects have a degree of flexibility in their M&E systems which allows for learning AND "M&E systems have three functions: accountability, steering and learning - we fear that it is upward accountability that is gaining ground".							
3	Learning from evaluations can take place through mixed-methods, and the aim of the article was to enable learning in the sector	The review found that mixed-methods evaluations were the most effective in terms of measuring change and outcomes.							
4	The processes of gender change requires effective learning tools facilitating introspection and interpretation of changes over time.	The analysis process emphasised processes of gender change and the dynamic nature of gender relations and institutional changes also requires effective process-monitoring and learning tools that facilitate introspection and interpretation of changes over time.							
5	Improving (...) requires new strategies and learning from innovative programs	The health center creates an environment of social connectedness, strengthened parenting, maternal and child wellbeing and empowerment - It also supports increased utilisation of health, education and support services and early detection of treatable child health issues.							
7	Only focuses on internal learning of participants	The women included feeling more empowered and learning to take responsibility							
9	(Learning) programmes must be consistent with the context, e.g. Fitted to the environment in which learning are planned to take place	(Learning) programmes must be consistent with the context, e.g. Fitted to the environment in which learning are planned to take place							
10	Treats learning as the main goal of WEGE interventions	Important for the participants: - Group as-a-whole process; - Relational outcomes; feeling of belonging; Personal and emotional outcomes; self-efficacy and empowerment							
11	Mostly focused on internal learning	Groups receiving the most innate support emphasised active participant and empowerment							

## Scopus

ID	Title	Author and year	C1:	C2:	C3:	C4:	C4a:	Source	Purpose and/or aim	
1	Promoting Women's Economic Empowerment: What w	Baumic, M. and Furst-Nicht, Yes	Yes	Yes	Yes	Yes	Yes	World Bank Group	Reviewing evaluations of interventions that seek to empowerment women economically	
2	A checklist to avoid pilot failures: lessons from a set of v	Johansson de Silva, S., Paol, Yes	Yes	Yes	Yes	Yes	Yes	Journal of Develop	Synthesising 10 lessons from the RRI (results-based initiatives) as a checklist to avoid pilot failure (to foster women's economic empowerment)	
3	A systematic review of training interventions addressing	Kouta, C., Pithara, C., Zohn, Yes	Yes	Yes	Yes	Yes	Yes	Oxford University	Identifying community and workplace-based training interventions aiming to increase capacity among marginalized at-risk women to deal with sexual violence	
4	Sexuality Education: Emerging Trends in Evidence and P	Harberland, N. And Rogow, Yes	Yes	Yes	Yes	Yes	Yes	Journal of Adoles	This article summarizes the elements, effectiveness, quality, and country-level coverage of CSE (Comprehensive Sexual Education)	
5	How a personal development program enhances social i	Spry, N. & Marchant, T., 20Yes	Yes	Yes	Yes	Yes	Yes	Australian Journal	Evaluating a Personal Development Program	
6	An Evidence Review of Gender-Integrated Interventions	Kraft, J. M., Wilkins, K. G., Yes	Yes	Yes	Yes	Yes	Yes	Journal of Health C	To identify evidence-based behaviour change interventions addressing gender dynamics in order to improve child health outcomes	
7	This is My Story: participatory performance for HIV and	Jaganath, D., Mulenga, C., Yes	Yes	Yes	Yes	Yes	Yes	Health Education I	Evaluating the Process and Collaboration for Empowerment and Discussion (PACED) one year after implementation	
8	Influence of health interventions on gender relations i	Jennings, L. And Gagliardi, Yes	Yes	Yes	Yes	Yes	Yes	International Jour	Investigating how mobile-based health programs geared towards women may exacerbate gender inequalities	
9	Community mobilization, empowerment and HIV preve	Bancharad, A. K., Mohan, H Yes	Yes	Yes	Yes	Yes	No			
10	Putting the "S" Back into Sexual and Reproductive Hea	Hemburger, A. And Ward, Yes	Yes	Yes	Yes	Yes	Yes	International Jour	Investigating the fragmented, non-holistic approach to reproductive health	
11	The Care Economy, Gender and the Silent AIDS Crisis i	Urdang, S, 2006	Yes	Yes	Yes	Yes	Yes	Journal of Southe	Considers the impact of AIDS on women's role and responsibilities within the household care economy'	
<b>ID: The role of (organisational) learning</b>										
1	N/A		<b>Main findings: (of methodological barriers and challenges to M&amp;E)</b>							<b>Thoughts/comments</b>
2	Learning requires resources, evaluations systems need to provide real-time feedback, a timeline of the intervention does not compromise good planning and learning leads to adaptation		Programmes need careful planning, implementation and follow-up in order to provide results.							N/A
3	Examples of how learning tools: " a 2-day regional workshop addressed to practitioners followed by a 3 month action learning activity and a 6-day intensive training"		Lack of interventions in the prevention and response to sexual violence against at-risk vulnerable women which needs to be addressed							Deals with learning, but on a personal level (training of trainers, etc.). Does not investigate organisational level: not how the organization can improve and learn, but how the trainers learn from interventions)
4	Examples of how learning is incorporated into the studies reviewed: "African review assessed teaching approaches as outlined in the materials and found, overall, inadequate attention to affective (emotional)		Teacher training approaches that allow teachers to internalize learning about gender issues and to practice and master new pedagogies should be applied.							NA
5	NA		Adult education plays a role in mobilising women for social connection and purposive outcomes that may serve to address the global issue of empowering women.							Importance of context when measuring empowerment: "There are no agreed measures of empowerment, partly because it is used in many disciplines at different levels of analysis, with varying intent (Narayan, 2005). By definition, it depends on the context."
6	NA		The majority of evaluations including interventions that engaged men and women to modify gender norms, had mixed effects. Evidence was most compelling for empowerment approaches							NA
7	NA		Retention in the following themes caused by the programme: 1. trust in a relationship and how it affects women, 2. equality for PLWHA and 3. life after HIV and AIDS. All (90 per cent) reported greater sense of empowerment.							NA
8	NA		Mobile phone programs can influence gender relations in positive ways by providing modes for communication and cooperation.							The role of male participation is included. No input on learning
10	NA		High-quality programmes include gender awareness and the importance of related power dynamics							Underlines the importance of contextual understanding, also emphasises to understand the risk and vulnerability

ID	Title	CT: Evaluation carried out by Donor/Year	C2: L.C3: T.C4.1 C4.2 Type	Level of the Purpose and/or aim
1	Evaluation of EU Support to Gender Equality an Yes	COWI, ITAD, ADE	EC/Eur. 2015 Yes	Yes
2	Evaluation of EU Support to Gender Equality an No		EC/Eur. 2015 Yes	Yes
3	Evaluation of EU Support to Gender Equality an No		EC/Eur. 2015 Yes	Yes
4	WP8: Evaluation of DFID Development Assistant Yes	Independent consultant DFID	2005 Yes	Yes
5	Evaluation of DFID Development Assistance: GE No		2005 Yes	Yes
6	WPs: Evaluation of DFID Development Assistant Yes	Independent consultant DFID	2004 Yes	Yes
7	WP12: Evaluation of DFID Development Assistant Yes	Independent consultant DFID	2005 Yes	Yes
8	WP10: Evaluation of DFID Development Assistant Yes	Independent consultant DFID	2005 Yes	Yes
9	WP7: Evaluation of DFID Development Assistant Yes	Independent consultant DFID	2005 Yes	Yes
10	WP13: Evaluation of DFID Development Assistant Yes	Independent consultant DFID	2005 Yes	Yes
<b>ID Data collection method</b>				
<b>The role of (organisational) learning</b>				
1	Mixed methods: document review, CSP/SP analysis, survey of EUD	Case examples have been selected to maximise the lesson-learning opportunities from the evaluation", learning takes place from narratives and specific examples.	EU not delivering a strong institutional commitment on GEWE; weak systems for Gender Plan, limited use of GEWE contextual analysis; monitoring and evaluation processes pay scant attention to gender; the gender marker is poorly understood and is not applied in practice and as a results.	See recommendations for how to revitalise efforts to support WEGE for example to mainstream gender into monitoring and evaluation procedures"
4	Mixed methods: document review, interviews	A challenge in balancing information required to track the policy focus of bilateral expenditure and to monitor progress, and the type of information needed to enable country programmes to share best practice and maximise learning	DFID applied a a rights-based approach, emphasising longer preparation processes and in-depth engagement with stakeholders (contextual understanding and in-depth gender analysis; creating relations with partners)	Concludes that there are no significant learning mechanisms present in the DFID strategy in relations to maternal mortality
6	Mixed methods: desk inquiry, field visits and consultations	"There has been limited progress in learning from the wealth of country experience and feeding this experience into policy development or guidance for the organisation."	Lack of consistency in application that has undermined effective use of these resources; limited progress in learning from country experience and feeding this experience into policy development or organisation	Concludes that there is limited available evidence on the impact of gender policy and mainstreamin strategies
7	Mixed methods	Centralising experiences and lessons learned in order to enhance learning: "DFID/CHAD should build up a central pool for sharing gender practice, resourcing gender expertise and gathering gender efficiency anecdotes to improve the integration of gender"	The key challenge is the lack of implementation of sound gender policies, owing to the absence of gender-sensitive knowledge and resources to engage local constituencies	See discussion/recommendations - the lessons learned in the article focus only on what can be learned; not how; no learning strategy
8	Mixed methods: desk review, meetings and telephone discussions with key informants - mapping	Should recommend ways to strengthen learning to contribute to policy guidance, which ensures that gender issues are better integrated in future. It is also suggested that the evaluation should not end as soon as the final report has been presented. Rather, that report should make suggestions as to how it can become a learning tool at country and programme level, for example through delivery of short seminars and discussion groups, and drafting of guidance notes for staff of all disciplines"	1. Gender equality is being sidetracked and is receiving less attention now than it was eight years ago. 2. Programmes have tended not to focus on the areas where women have a significant interest.	limited time frames of programmes; impacts of most reform measures are only apparent over time, and assessments are conducted at the end of a programme
9	Quantitative Review	DFID has a weak institutional memory (the shift to new aid modalities seems to have incurred a loss of lessons learned around gender. Institutional memory within DFID appears to be weak and there are few opportunities for sharing experience across programmes. Currently low levels of learning; much more could be done by learning from experiences and adopting a more coherent stance on the importance of addressing gender issues.	1. Many achievements in the area and enormous potential to further contribute to women's empowerment and gender equality. 2. the trend away from local to macro level interventions has increased the emphasis on an instrumentalist approach to gender mainstreaming	Concludes low levels of learning in DFID and weak memory; suggesting emergent need for strategies
10	Mixed methods	DFID could enhance learning by for example: "consider drawing actively on its several good practices by disseminating materials, holding seminars, facilitating project staff to attend policy meetings and seeking to replicate it in other regions. It may be particularly useful to prepare summary documentation on good practice."	The organisation has undertaken several important interventions - positive experiences appear to be driven by the commitment of individual staff members - however, out of the 12 interventions reviewed against the mainstreaming indicators, four met none of them and five met only between one and three of these	Proposes specific methods to enhance learning