



Canadian International
Development Agency

Agence canadienne de
développement international



CIDA'S **FRAMEWORK FOR ASSESSING** **GENDER EQUALITY RESULTS**

This framework is an important advancement for the Canadian International Development Agency (CIDA). There are few, if any, corporate-level frameworks for assessing performance on gender equality as a crosscutting theme. This publication summarizes the newly developed *CIDA's Framework for Assessing Gender Equality Results*. The framework was designed to provide a means to undertake a corporate-level assessment of CIDA's performance on gender equality as a crosscutting theme and thus support continuing progress in this area. The implementation of this framework will support CIDA's results-based management approach by providing feedback related to CIDA's accountability for development results and by identifying lessons intended to strengthen management for gender equality results.

The major initial question posed by the framework is the following: to what extent do CIDA's development results reflect the Agency's commitment to gender equality as set out in *CIDA's Policy on Gender Equality*? In other words, the framework will examine whether CIDA investments are making contributions to CIDA's corporate gender equality results and if so, whether these results are significant in relation to the overall initiatives undertaken. As reflected in the design of the framework, an assessment will include all types and sectors of CIDA investment, including investments in directive programming, responsive programming, and core funding of institutions. A corporate-level assessment using this framework is being planned for the coming year.

It is hoped that the framework will be of use to you and your organization as you seek to develop your own approaches for assessing results in support of gender equality.

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Catalogue No. CD4-25/2005E

ISBN 0-662-40865-9

Printed and bound in Canada

**CIDA'S FRAMEWORK FOR ASSESSING
GENDER EQUALITY RESULTS (2005)**

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Acknowledgements

The Gender Equality Division would like to acknowledge the work of the Agency Task Group in developing this Framework.. The Task Group included: Julia Bracken (Team Leader, Policy Branch), Lucie Bazinet (Americas Branch), Tamara Sequeira (Asia Branch), Valerie Young (Performance and Knowledge Management Branch) and Johanna Schalkwyk (Consultant). The pilot for directive and responsive programming was undertaken by Julia Bracken and Johanna Schalkwyk. The pilot for the core funding component was undertaken by a consultant, Beth Woroniuk. Valuable advice and support regarding data generation was provided by Maher Mamhikoff and Hubert Drolet in the Strategic Information Division (Policy Branch). We would also like to extend thanks to all those who provided comments to the Task Group and participated in consultations, especially the members of the Agency's Gender Equality Core Group.

1. INTRODUCTION

This assessment framework responds to the need to assess progress on the implementation of *CIDA's Policy on Gender Equality*. It is also an important advance in assessing gender equality as a cross-cutting policy theme.

An earlier version of the framework was proposed in June 2003 as a work in progress. The revised framework presented in this document reflects the findings of a pilot done to test the assessment tools and the utility of the approach.¹



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1. The formulation of the assessment framework was a joint initiative of the Gender Equality Division, Policy Branch and the Agency's Gender Equality Core Group (which includes representatives of all branches). This was a two-year process with continuous participation by a five-member "task group" with representatives from Policy Branch, Asia Branch, Americas Branch and the Performance and Knowledge Management Branch. The pilot was undertaken in 2004. A separate report was prepared to summarize the pilot findings. A set of technical notes has also been prepared to support implementation.

2. RATIONALE (WHAT PURPOSES DOES THE FRAMEWORK SERVE?)

The assessment framework supports CIDA's results-based approach in two ways.²

- ◆ **Accountability for development results.** The framework sets out “assessment tools” for reviewing the range of CIDA investments in relation to CIDA's corporate gender equality results, and a means to aggregate assessments of particular investments to draw conclusions about the extent to which CIDA investments are making contributions to the corporate gender equality results.
- ◆ **Strengthened management for results.** Findings about strengths and gaps identified through the use of the assessment tools provide a sound basis to identify more in-depth follow-up studies designed to provide insights into the quality of results achieved, factors conducive to achieving results, reasons for gaps and lessons for future programming.

The central question this framework is designed to address is – *to what extent do CIDA's development results reflect its policy commitment to gender equality?* Gender equality is a key result area for the Agency, which has had a formal commitment to support equality between women and men through its development co-operation investments since 1976. While CIDA's approach has evolved since then to reflect experience gained, the basic and continuing theme since the first statement has been that CIDA investments should recognize differences in the situation of women and men to deliver equitable benefits and contribute to reducing inequalities. The 1999 update to CIDA's Policy on Gender Equality reflects the consensus between CIDA and its development partners (including partner governments and other development assistance agencies) that gender equality is an important development goal in its own right, and is also integral to the achievement of poverty reduction and sustainable development. The Policy also reflects Canada's international commitments to equality between women and men, particularly the 1995 *Platform for Action* endorsed in Beijing (and reaffirmed in 2005) and the *Convention on the Elimination of All Forms of Discrimination against Women*, to which Canada and most development partners are signatories.³

The term “gender equality results” is used in the framework to refer to results that contribute to reducing inequality between women and men in accordance with the Policy.

The *accountability of CIDA managers for achieving gender equality development results* has been clearly stated in several policy documents. CIDA's Policy on Gender Equality states that “accountability for the implementation of this policy rests within each of CIDA's corporate and program branches, partners and executing agencies.” The 1998 Agency Accountability Framework states that the President is accountable to the Minister for “actual development results achieved, in conjunction with partners” and for “the decisions and actions taken in achieving the objectives established by CIDA within its mandate;” vice-presidents are accountable for “development results, consistent with the Agency policy framework in conjunction with partners.” Accountabilities for development results are also specified for directors and program managers throughout the Agency.⁴ These accountability requirements increase the importance of management for results and the value of analyses that identify lessons to support more informed decision making toward achieving gender equality results.

2. See discussion in “Review of Current RBM and Accountability Practices in CIDA.” May 2002.

3. For *CIDA's Policy on Gender Equality* and related information, see <www.acdi-cida.gc.ca/equality>.

4. See the Annex for a further discussion of accountability relationships for gender equality development results under the different business delivery models.

3. FOCUS OF ASSESSMENT (WHAT IS BEING ASSESSED?)

The framework sets out an approach to performance assessment that differs in significant ways from more familiar project-based performance measurement, because it focuses on Agency performance on a cross-cutting theme, rather than on a specific investment. Performance assessment of a specific investment generally focuses on the question: did the investment contribute to the specific results it was designed to achieve? In contrast, performance assessment of the Agency in implementing *CIDA's Policy on Gender Equality* focuses on the extent to which CIDA investments contribute to gender equality results defined at the broader, corporate level.

Drawing on *CIDA's Policy on Gender Equality*, the overall result or impact to which CIDA seeks to contribute is “equality between women and men to ensure sustainable development.” The Policy also identifies *three corporate objectives* that can be restated in the form of results as follows.⁵

- i) **Decision making.** More equal participation of women with men as decision makers in shaping the sustainable development of their societies.
- ii) **Rights.** Women and girls more able to realize their full human rights.
- iii) **Development resources and benefits.** Reduced inequalities between women and men in access to and control over the resources and benefits of development.

These are results to which CIDA can *contribute*, but will not achieve on its own. An assessment of CIDA performance therefore needs to focus on the nature and significance of the *incremental contributions* made through CIDA's investments in specific initiatives.

While gender equality expected results have been identified at the corporate level, CIDA's actual results and contributions to gender equality depend on decisions made in the selection, design and management of specific investments. These investments may be made through any of CIDA's three business models (directive programming, responsive programming and core funding/institutional support), respond to different priority sectors (such as governance, private sector, health, education) and use various approaches (from community development to institutional capacity building). Most of these investments do not have gender equality as their principal objective. However, to the extent that they affect people, all these investments potentially have positive (or negative) effects on gender equality.

Accordingly, the assessment framework begins with a *major initial question: to what extent do CIDA's development results reflect its policy commitment to gender equality?* That is, are CIDA investments making contributions to the corporate gender equality results? In what proportion of cases are these contributions meaningful or significant in relation to the overall initiative undertaken? Do the number of investments in which there are significant contributions to gender equality results add up to a significant proportion of CIDA's overall investment in development? Where are the strengths and gaps?

The *initial focus is therefore on development results*, rather than processes, inputs or efforts (such as doing gender analyses or the preparation of gender equality strategies). While the latter are important, they are the means to achieve results, rather than results themselves. The initial findings about development results provide the basis to structure more *in-depth follow-up analyses to identify lessons* to inform decision making and future management for results.

5. The restatement of “goal” and “objectives” in the form of results was envisaged in the Policy as a basis for performance measurement.

An *assessment of CIDA performance must cover all types of investment*, whether delivered as directive programming, responsive programming or core funding/institutional support. (The three business models are defined in the CIDA RoadMap, see Annex.) Given differences in the characteristics and objectives of the investments made under the three business models, the *framework provides for two different approaches*:

- (i) *Approach for directive and responsive programming.* For both directive and responsive programming, investments are designed to respond to a particular development problem or set of problems, have a set of expected results that relate to that problem, and are undertaken in a specific location for a specific time period. The Agency's results-based management (RBM) tools are used for planning and management, and there are regular reporting mechanisms to capture information on actual outcome-level development results (the changes achieved through the investment). In responsive programming, accountabilities are shared to a greater extent between CIDA and partners than they are in directive programming, but the actual results achieved can be reviewed in the same way for both business models.

For directive and responsive programming, the assessment focuses on the results achieved by projects that are completed or near completion and aims to identify whether project results contribute to any of CIDA's corporate gender equality results. The approach for these types of programming is discussed in Section 5.

- (ii) *Approach for core funding of institutions (including multilateral, regional and non-governmental organizations).* Core funding differs significantly from project or program funding. Institutions receiving core funding generally have an ongoing relationship with CIDA. The investment is in the institution, and that institution, rather than CIDA, takes responsibility for the design and management of specific programs. In contrast with directive and responsive programming (where CIDA aims to have a direct effect on development results), with core funding, CIDA aims to achieve development results indirectly through support to partners with policies, priorities and approaches that are congruent with those of CIDA. Performance reporting by these institutions relates to the use of their resources from all sources in support of institutional policy objectives.

For core funding, the assessment focuses on the quality of the institutional strategy and mechanisms for achieving gender equality development results, with particular attention to the monitoring and reporting of gender equality results. The approach is set out in Section 6.

4. VALUE-ADDED (WHAT DOES THE FRAMEWORK ALLOW US TO DO?)

The innovative aspects of this framework are the assessment tools to be used in the initial phase of a two-phase assessment process.

In the case of directive and responsive programming, the assessment tool provides a means of categorizing the results against the corporate gender equality results and then weighing the significance of these results on a graduated scale. This provides:

- ◆ a means of focusing on gender equality results that is realistic in view of CIDA's investments in partner countries and that is related to the decisions taken by CIDA in planning and managing its investments;
- ◆ a common framework for considering contributions to gender equality by projects in various sectors and a means of aggregating these diverse contributions to provide an overview of how well CIDA is implementing the *Policy on Gender Equality*; and
- ◆ a basis on which to make informed decisions for the follow-up phase of the assessment on issues that would justify further attention to identify lessons and insights about factors influencing results achievement.

In the case of core funding, the assessment tool sets out elements relevant to gender equality results and a means to rate these elements as well as the institution. This provides:

- ◆ a clarification of the key aspects of institutional performance on gender equality and thus a common framework for assessment;
- ◆ a means to gain an overview of the performance of core-funded institutions, as the rating process results in findings that can be aggregated; and
- ◆ a means to identify particular types of strength and weakness and therefore a basis on which to be strategic in designing the assessment's follow-up phase of in-depth studies that aim to identify lessons for improved performance.

In both cases, the use of the tools will result in an overview and a summary assessment of performance. However, the tools do not themselves provide a means to analyze why or how such results were achieved, or what steps should be taken to improve gender equality results. The use of the tools must be complemented with further analyses to provide a more complete picture of the quality of results and the operational factors supporting the achievement of the results. The in-depth follow-up analyses required to complete the assessment will draw on other CIDA assessment tools and approaches (including, for example, the "Framework of results and key success factors") and would consider the implementation of the operational steps outlined in *CIDA's Policy on Gender Equality*.

5. ASSESSMENT OF DIRECTIVE AND RESPONSIVE PROGRAMMING

There are two phases in the assessment process – an initial analysis using the assessment tool outlined in this framework and then follow-up analyses guided by the findings of the initial analysis.

Initial phase: assessment tool and analysis

The approach for the initial phase is to use the assessment tool to categorize and rate results achieved by a broad sample of investments selected to be representative of CIDA's directive and responsive investments. As the focus is on outcome-level results, the investments included in the sample should be sufficiently advanced in implementation to allow for an assessment of actual results achieved (e.g., 80 percent or more disbursed). The Agency's central data systems will be the data source, providing information on both key characteristics of the investments in the sample (branch, country, priority sector, business model, budget, etc.) and results information (project performance reports, also known as PPRs).

Tool 1(a): Categorization of gender equality results consists of the three corporate gender equality results, each of which is further subdivided into its key elements, resulting in a 10-part classification. (The tool provides illustrations to assist with classification, as there are many different ways that particular investments could contribute to the gender equality result.)

Tool 1(b): Rating scale for significance of gender equality results is a four-point scale to weigh the significance of each gender equality result (significant, encouraging, modest, weak). An overall rating for the investment is based on the combined ratings of all the gender equality results it achieved. (See pages 7-11 for a schematic overview of the approach and the assessment tool.)

The categorization of results, together with the ratings on the significance of results, provide a means to aggregate the assessments of specific investments and to identify where gender equality results are being achieved (or not). The initial analysis of the database created provides insights into the extent to which directive and responsive initiatives are reporting gender equality results. **Major questions to consider in data analysis include:**

- ◆ What proportion of CIDA investments are contributing to the corporate gender equality development results? How many are making contributions of some significance? What proportion of CIDA investment does this represent?
- ◆ In what regions or CIDA priority sectors are investments most likely to make significant contributions to the corporate gender equality results? Where are the greatest gaps? How do directive and responsive programming compare?
- ◆ What is the relationship between sectors (or CIDA priority sectors, regions, etc.) and types of gender equality results reported?
- ◆ In what areas of gender equality are results being achieved (e.g., decision making, rights, development resources and benefits)? Within each broad result category, what are the particular types of results?

Schematic overview of approach for directive and responsive programming

For each investment included in the assessment:

- 1) *Identify whether there are reported results or achievements that can be categorized under any of the gender equality results (Tool 1(a)).*
- 2) *Identify whether there is credible evidence offered to back the claim on these results.*
- 3) *Weigh the significance of each gender equality result using the rating scale (Tool 1(b), step 1).*
- 4) *Provide an overall rating for the investment (Tool 1(b), step 2).*

The results ratings and the overall rating for the investment, together with basic information about the investment, such as budget, codes for country, business model, priority sector, etc. (as well as a brief statement of the results) would make up the database used for the analysis of performance.

Gender equality results		Questions about each investment		
Corporate Development Result <i>(from CIDA's Policy on Gender Equality)</i>	Elements of this result. The major types of outcomes for each gender equality result are outlined below. The assessment will categorize results achieved by CIDA investments under these headings. See Tool 1(a) for illustrations of the types of reported results that would be assigned to each category. (Where an investment has results in more than one category, each should be rated separately.)	Results in any of these areas? If yes, what was the result achieved?	Evidence of results? (Qualitative and/or quantitative)	Significance of results? Rating on the scale in Tool 1(b)
1. DECISION MAKING More equal participation of women with men as decision makers in shaping the sustainable development of their societies.	1.1 Capacity for public participation. Increased capacity of women and women's organizations for advocacy and for participation in public life and decision making.			
	1.2 Representation among decision makers. Increased representation of women in democratic processes and in decision making positions in the partner institution, target sector, partner community.			
	1.3 Household and individual decision making. More equal power relations between women and men at the household level, increased decision making capacity of individual women.			
2. RIGHTS Women and girls more able to realize their full human rights.	2.1 Legal system. Strengthened promotion and protection of the human rights of women and girls in law and the action of police, prosecutors, judges, courts.			
	2.2 Public awareness. Increased knowledge and recognition by the general public (women and men) and decision makers of the human rights of women and girls.			
	2.3 Response to gender-specific rights violations. Improved services and mechanisms responding to gender-specific constraints on rights or rights violations (e.g., violence against women/girls, trafficking, sexual violence in conflict zones).			
3. DEVELOPMENT RESOURCES AND BENEFITS Reduced inequalities between women and men in access to and control over the resources and benefits of development.	3.1 Livelihoods and productive assets. Increased control by women over productive assets (land, capital/credit, technology, skills) and increased access to decent work.			
	3.2 Institutional capacity. Increased capacity of partner institutions, governments and civil society organizations to design and implement policies, programs and projects that reflect the priorities and interests of both women and men.			
	3.3 Policy change. Adoption of policies supporting gender equality by institutions that manage development resources and benefits (i.e., policies responding to the different priorities and interests of women/men, girls/boys).			
	3.4 Well-being and basic needs. Access by women to basic and appropriate services that support well-being and quality of life.			
		Overall rating: see Tool 1(b)		

TOOL 1 (a): GENDER EQUALITY RESULTS CATEGORIZATION

GENDER EQUALITY RESULTS		ILLUSTRATIONS: of the types of results that would fall in each category (i.e., illustrations of the way in which a project or other investment could contribute to particular gender equality results)
Corporate result	Elements of this result (assessment categories)	
1. Decision making More equal participation of women with men as decision makers in shaping the sustainable development of their societies.	1.1 Capacity for public participation. Increased capacity of women and women's organizations for advocacy and for participation in public life and decision making.	<ul style="list-style-type: none"> ◆ Strengthened knowledge or skills (e.g., advocacy, negotiation, management) of women for participation in democratic or community-management bodies. ◆ Increased capacity or effectiveness of women's organizations to advocate for and represent women's views. ◆ Strengthened women's organizations or networks. ◆ Strengthened dialogue between women's organizations and government authorities. ◆ More supportive environment for women's participation in public life and decision making in communities or institutions and among male colleagues. ◆ Increased influence of women, women's organizations in community and public decision making.
	1.2 Representation among decision makers. Increased representation of women in democratic processes and in decision making positions in the partner institution, target sector, partner community.	<ul style="list-style-type: none"> ◆ Increased number/proportion of women in decision making positions in (depending on the project objectives): <ul style="list-style-type: none"> ◆ the partner organization (not the project itself); ◆ the target sector; ◆ the partner community; and ◆ as candidates for public office.
	1.3 Household and individual decision making. More equal power relations between women and men at the household level; increased decision making capacity of individual women.	<ul style="list-style-type: none"> ◆ Increase in independent decision making by women on matters such as voting, mobility. ◆ Increase in shared decision making at the household level on matters such as expenditure, activities, etc.
2. Rights Women and girls more able to realize their full human rights.	2.1 Legal system. Strengthened promotion and protection of the human rights of girls and women in law and the actions of police, prosecutors, judges and courts.	<ul style="list-style-type: none"> ◆ Increased use of the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) in national law. ◆ Formulation of legislation on key gender equality issues (e.g., land rights, violence, discrimination in employment). ◆ Elimination of legal barriers to equality (through specific legislation, or as part of legal reform). ◆ Actors in legal system (police, prosecutors, judges) more knowledgeable and able to treat women equitably. ◆ Improved access by women to the legal system (legal aid, reduction of barriers to access). ◆ More equitable decision making in formal and informal judicial bodies.
	2.2 Public awareness. Increased knowledge and recognition by the general public (women and men) and decision makers of the human rights of women and girls.	<ul style="list-style-type: none"> ◆ Increased awareness of rights violations, such as trafficking of women and girls, forced marriage, dowry, early marriage, female genital mutilation. ◆ Increased awareness and participation by civil society organizations (e.g., human rights organizations, development organizations) in advocating for gender equality and women's rights. ◆ Awareness among women and men of laws and mechanisms protecting women's rights; increased participation by men in advocacy and debate on gender equality. ◆ Increased awareness and support among decision makers on women's rights and gender equality issues; more informed debate on these issues. ◆ Better media coverage of gender equality and women's rights changes in public attitudes about roles and entitlements of women and men.

	<p>2.3 Response to gender-specific rights violations. Improved services and mechanisms responding to gender-specific constraints on rights or rights violations (e.g., violence against women/girls, trafficking of women and girls, sexual violence in conflict zones).</p>	<ul style="list-style-type: none"> ◆ Improved provision or functioning of social services (e.g., shelters) responding to rights violations by government or civil society organizations. ◆ Strengthened policy commitments and programs to respond to gender-specific constraints on rights, rights violations.
<p>3. Development resources and benefits Reduced inequalities between women and men in access to and control over the resources and benefits of development.</p>	<p>3.1 Livelihoods and productive assets. Increased access and control by women over productive assets (land, capital/credit, technology, skills) and increased access to decent work.</p>	<ul style="list-style-type: none"> ◆ Increased access to credit and business support services. ◆ Increased number or competitiveness or sustainability of women's micro enterprises, businesses, farms. ◆ More equitable access by women to productivity-enhancing inputs and services (extension, skills training, technology). ◆ Strengthened women's producer organizations. ◆ More equitable access by women to land, land ownership. ◆ Increased productivity or incomes of women, decreased disparity in incomes among populations affected by an investment; decreased vulnerability to destitution. ◆ Increased access by women to skills training, employment opportunities; increased representation of women in professional, technical fields. ◆ Reduced discriminatory practices against women workers; increased quality of employment (e.g., pay, conditions, health and safety).
	<p>3.2 Institutional capacity. Increased capacity of partner institutions, governments, and civil society organizations to design and implement policies, programs and projects that reflect the priorities and interests of both women and men.</p>	<ul style="list-style-type: none"> ◆ Clearer institutional responsibilities, approaches to achieving national gender equality objectives. ◆ Strengthened analytic skills, knowledge of gender equality issues, capacity to do gender analysis in a particular sector or public organization. ◆ Strengthened capacity and systems to collect and analyze data required for gender analysis of issues, policies and programs. ◆ Increased institutional capacity to consult with women and men on issues and priorities or on gender equality issues. ◆ Increased capacity to manage for employment equity (recruitment, training, health and safety, family leave). ◆ Increased effectiveness of partner organizations or local governments in reaching and serving women equitably.
	<p>3.3 Policy change. Adoption of policies supporting gender equality by institutions that manage development resources and benefits (i.e., policies responding to the different priorities and interests of women/men, girls/boys).</p>	<ul style="list-style-type: none"> ◆ <u>Economic policies</u>: gender-equitable macro-economic policies (e.g., fiscal policies, trade, budgets). ◆ <u>Poverty reduction strategies</u>: inclusion of measures directing resources to poor women or measures to address the gender-specific constraints faced by poor women. ◆ <u>Social policies</u>: policies in health, education, social services and other sectors that incorporate elements to reduce gender inequality or address women-specific issues. ◆ <u>Sectoral reforms</u>: establishment of clear sectoral gender equality objectives, sector-wide implementation mechanisms.
	<p>3.4 Well-being and basic needs. Access by women to basic and appropriate services that support well-being and quality of life.</p>	<ul style="list-style-type: none"> ◆ Increased safety, food security, access to water, shelter, transport, literacy, health, education, etc. by women. ◆ Increased access to social services; social service delivery that responds to the different priorities and interests of women/men, boys/girls. ◆ Increased capacity of women's organizations to deliver services. ◆ <u>Health</u>: increased appropriateness and use of health care; improved health status of women or reduced gender gaps in health status indicators among population served/reached. ◆ <u>Education</u>: increased proportion of girls/women at all levels; decreased drop-out rates. ◆ <u>Humanitarian services</u>: access by women to appropriate services and resources.

TOOL 1(b): RATING SCALE FOR SIGNIFICANCE OF GENDER EQUALITY RESULTS

Step #1. Rate significance of results. Where results have been identified in any of the gender equality results categories (see Tool 1(a)), weigh the significance of that result according to the scale below. NOTE: there should be a separate rating for any results category in which results are identified (what is rated here is the particular result).

SIGNIFICANT	<p>Meets ALL the following criteria:</p> <ul style="list-style-type: none"> ◆ gender equality result is relevant to the main results of the investment (i.e., not a peripheral or marginal outcome). ◆ there is adequate evidence to back the claim on results achieved on gender equality (qualitative and/or quantitative indicators demonstrate change). ◆ reach/target of gender equality result is significant, for example: <ul style="list-style-type: none"> ❖ <i>for investments aimed at organizational capacity</i>: the gender equality result relates to a significant aspect of organizations functioning within the scope of the initiative (i.e., significant with respect to organizational action in relation to its mandate and the population it affects). ❖ <i>for investments at the community level</i>: the gender equality result relates to: <ul style="list-style-type: none"> ■ a large number of women or men (access to services or opportunities); OR ■ an equitable proportion of participants/beneficiaries in the investment.
ENCOURAGING	<p>Meets the relevance criterion:</p> <ul style="list-style-type: none"> ◆ gender equality result is relevant to the main results of the investment (i.e., not a peripheral or marginal outcome). <p>AND meets ONE of the other criteria of SIGNIFICANT:</p> <ul style="list-style-type: none"> ◆ there is adequate evidence to back the claim on results achieved on gender equality (qualitative and/or quantitative indicators demonstrate change) OR ◆ the reach/target of the gender equality result is significant, for example: <ul style="list-style-type: none"> ❖ <i>for investments aimed at organizational capacity</i>: the gender equality result relates to a significant aspect of organizations functioning within the scope of the initiative (i.e., significant with respect to organizational action in relation to its mandate and the population it affects). ❖ <i>for investments at the community level</i>: the gender equality result relates to: <ul style="list-style-type: none"> ■ a large number of women or men (access to services or opportunities); OR ■ an equitable proportion of participants/beneficiaries in the investment. <p>(While the gender equality result is relevant, there is EITHER weak evidence but good reach OR adequate evidence but poor reach.)</p>
MODEST	<p>Meets the relevance criterion:</p> <ul style="list-style-type: none"> ◆ gender equality result is relevant to the main results of the investment (i.e., not a peripheral or marginal outcome). <p>BUT DOES NOT meet the other criteria of SIGNIFICANT, so that:</p> <ul style="list-style-type: none"> ◆ there is only partial evidence of results achieved or evidence that is not fully persuasive to back the claim on results achieved on gender equality); ◆ reach/ target is more limited, so that: <ul style="list-style-type: none"> ❖ <i>for investments aimed at organizational capacity</i>: the gender equality result relates to some aspect of organizational functioning (but not an aspect that is particularly “significant” with respect to organizational action in relation to its mandate and the population it affects). ❖ <i>for investments at the community level</i>: the gender equality results relate to: <ul style="list-style-type: none"> ■ a substantial number of women or men (less than “large”); OR ■ a substantial proportion of participants/beneficiaries in the investment (but not achieving “equitable”). <p>(While the gender equality result is relevant, there is NEITHER adequate evidence nor significant reach.)</p>
WEAK	<ul style="list-style-type: none"> ◆ A gender equality result can be identified that is relevant to the main results of the investment, but evidence of results achievement is weak, anecdotal or non-existent. <p>OR</p> <ul style="list-style-type: none"> ◆ A gender equality result is identified but is peripheral or marginal to the main results achieved. <p>OR</p> <ul style="list-style-type: none"> ◆ Reach is very limited. <p>(NOTE: Achievements that relate only to staff hired by the executing agency to manage or deliver the project do not qualify as a gender equality result.)</p>

Step #2. Provide an overall rating of an investment’s contribution to corporate gender equality results. The overall rating is equal to the highest rating achieved on a particular gender equality result. (NOTE: the scale is NOT intended to respond to the question “is this a significant project?” but rather, “does the project make significant (or encouraging, modest, etc.) contributions to gender equality development results?”)	
SIGNIFICANT	◆ Investment has at least one rating of SIGNIFICANT.
ENCOURAGING	◆ Investment has at least one rating of ENCOURAGING.
MODEST	◆ Investment has at least one rating of MODEST.
WEAK	◆ Investment has at least one rating of WEAK.
NONE	◆ NO gender equality result identified.

Follow-up phase: focused studies

The areas of strength and gaps identified through the initial phase of this assessment framework will provide a foundation for defining focused follow-up studies on factors conducive to achieving results, reasons for gaps in performance, and implications for project selection, design and management by CIDA. Such studies also allow for more in-depth assessments of the quality of the results achieved and a better understanding of the findings of the initial analysis.

In contrast with the initial analysis, the follow-up studies require field research. The follow-up to the initial “diagnosis” is ideally undertaken using participatory approaches that involve CIDA staff and partners in considering the facilitating and constraining factors and in drawing practical lessons. Participatory approaches both enrich the analysis and support Agency learning and capacity development.

Types of questions that could be pursued in the follow-up analyses are suggested below.

- ◆ *For clusters of projects identified through the initial analysis as having made “significant” contributions to the corporate gender equality results:*
What are the commonalities among these investments? To what extent was performance on gender equality influenced by factors, such as the local political and social context, the sector or policy priority of the investment? Or by the steps in the planning process taken by CIDA, the nature of local partners and implementing agencies, or attention to gender equality in project implementation and performance monitoring? What conclusions can be drawn about success factors that could be used to guide further planning and management by CIDA?
- ◆ *For clusters of projects rated as having made only “modest” or “weak” contributions to gender equality results:*
Considering the same factors noted above, how do these projects compare with the projects rated as making “significant” contribution to gender equality results? What does this suggest about factors to address to improve performance?
- ◆ *Considering particular areas of gender equality results (decision making, rights, development resources), in which significance ratings are consistently high:*
What can be learned about good practice in obtaining results in these areas of gender equality? And if there are areas in which significance ratings are consistently low, what conclusions can be drawn from these experiences about potentials and constraints?

6. ASSESSMENT OF CORE FUNDING

As with directive and responsive programming, there are two phases in the assessment process for CIDA core funding of institutions: an initial phase using the assessment tool and a follow-up phase guided by the findings of the initial analysis.

Initial phase: assessment tool and analysis

The approach for the initial phase is to use the assessment tool⁶ to review and rate the extent to which institutions receiving core funding from CIDA are in a position to contribute to gender equality results. The sample used for the assessment should be selected so conclusions can be drawn about progress and issues in relation to the main groupings of CIDA core funding: investments in large multilateral and regional organizations, investments in smaller international and non-governmental organizations, and investments through mechanisms such as pooled funding and budgetary support.⁷

Tool 2, Assessment of core-funded institutions, sets out six assessment factors that have been defined to reflect a number of considerations: the rationale for core funding, CIDA's accountability for this type of investment, the lessons from CIDA experience about achieving gender equality results, and relationships between CIDA and core-funded partners. The first element of Tool 2 focuses explicitly on gender equality results, and is given greater weight than the others in deriving an overall rating for the institution. The next four elements examine institutional strategies and mechanisms that contribute to the achievement of gender equality results: gender equality policy, the broader institutional framework, the enabling environment and institutional commitment. The final element focuses on human resource management practices rather than development results, but is included as it is another indicator of institutional awareness and commitment to gender equality as a value (and is a gender equality issue that CIDA has consistently raised with partner institutions).

The use of Tool 2 produces a rating for the institution on each element, as well as an overall institutional rating. *The ratings provide a means to aggregate the assessments and to consider questions such as the following.*

- ◆ What proportion of the institutions receiving CIDA core funding could be considered to have an “excellent” or “good” approach on gender equality? What proportion is “of concern”? And what proportion of CIDA core funding (dollar value) do the higher ratings represent?
- ◆ What are the particular areas of weakness? What proportion of institutions, and which types of institutions, are monitoring for gender equality results? How many and which type could be rated as “good” on this element?
- ◆ Are there similar patterns among the different types of core-funded institutions (United Nations organizations, international financial institutions, non-governmental organizations)?

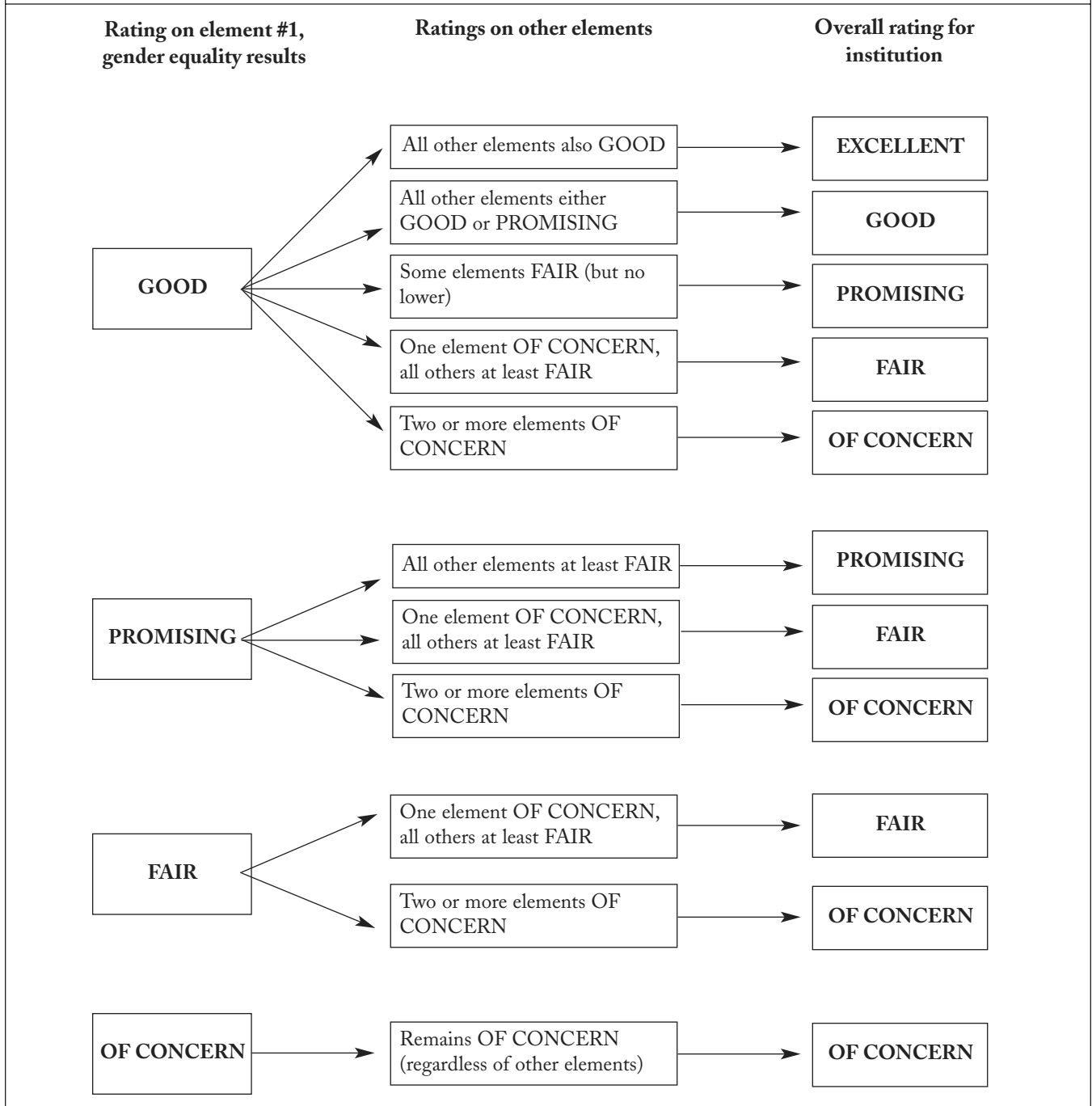
6. Multilateral Programs Branch is introducing this tool for the assessment of core-funded institutions as part of its due diligence exercise, and also considering its use as an ongoing management tool.

7. See footnote 10.

TOOL 2: ASSESSMENT OF CORE FUNDING		
Step #1: Rating of specific elements of institutional strategy, structures and achievements		
Institutional Performance: What are we looking for?	Rating	Decision criteria for rating
<p>1. Gender Equality Results Institutional programming contributes toward gender equality development results. Institutional systems are in place to monitor results, and these are regularly reported on.</p> <p>(As in the Beijing Platform for Action or PFA, gender equality results refer to women's empowerment and equality of women and men.)</p>	Good	<ul style="list-style-type: none"> ◆ Institutional monitoring systems on actual results show that a significant proportion of programming contributes to gender equality. ◆ Annual reports clearly document consistent results relating to gender equality and report on progress toward specific, measurable targets.
	Promising	<ul style="list-style-type: none"> ◆ Institutional monitoring/evaluation of actual results provides some information on results related to gender equality and shows that some programming contributes to gender equality (i.e., gender equality results are at least tracked, even if actual results are less than significant or substantial).
	Fair	<ul style="list-style-type: none"> ◆ Institutional monitoring reports only on anecdotal achievements relating to gender equality.
	Of Concern	<ul style="list-style-type: none"> ◆ Institutional monitoring/evaluation of results is weak (or non-existent) and provides no information on results related to gender equality.
<p>2. Shift to a Gender Equality Focus The institution's approach (in its policy and related documentation on gender equality) reflects the international consensus reached in international documents, such as the Beijing PFA and the full implementation of CEDAW. Gender equality is seen as an explicit development goal and as integral to the achievement of other development goals, such as the Millennium Development Goals (MDGs).</p>	Good	<ul style="list-style-type: none"> ◆ There is a clear focus on gender equality and women's empowerment as integral to development (as a goal in itself and integral to other development goals). ◆ There are clear links between gender equality goals and the overall mandate of the organization. ◆ There is a clear focus in the policy on results.
	Promising	<ul style="list-style-type: none"> ◆ Although it had an approach that emphasized service delivery or women as a vulnerable group, it is in the process of reviewing and clarifying its approach in light of its institutional mandate and the international consensus reached in the Beijing PFA.
	Fair	<ul style="list-style-type: none"> ◆ The institution's gender equality policy focuses primarily on its internal process (i.e., training of staff or the need to do a gender analysis) with few commitments to achieve and monitor results.
	Of Concern	<ul style="list-style-type: none"> ◆ The primary focus is on service delivery to women or women as a "vulnerable group," with limited attention to the social/institutional underpinnings of gender disparities and discrimination against women. There is no results focus.
<p>3. Supportive Institutional Policy Framework Gender equality perspectives are evident in the major policy and planning documents guiding the work of the institution. For example, gender perspectives and/or expected results are evident in:</p> <ul style="list-style-type: none"> ◆ Poverty reduction policies ◆ Strategic plans ◆ MDG implementation plans ◆ Sectoral policies relating to environment, education, post-conflict, etc. ◆ Evaluations. 	Good	<ul style="list-style-type: none"> ◆ The governing strategy document or policy paper for the institution/organization incorporates gender equality perspectives in the aims and guidance it sets out, and makes clear links between gender equality and major institutional policy concerns. ◆ Sectoral policies consistently include attention to gender equality issues.
	Promising	<ul style="list-style-type: none"> ◆ Gender equality perspectives in the governing strategy or policy are limited, but have been incorporated in a substantive way in at least one important sectoral or thematic strategy or policy statement (in addition to any separate gender equality policy statement).
	Fair	<ul style="list-style-type: none"> ◆ There are only occasional references to gender equality with only limited analysis of the links between gender equality and other development objectives.
	Of Concern	<ul style="list-style-type: none"> ◆ Only pro forma references to gender or gender equality are found in agency policies/strategies (other than a gender equality policy).

<p>4. Institutional Enabling Environment The institution has developed a comprehensive and systematic approach to ensure attention to gender equality results throughout the organization. Consider, for example:</p> <ul style="list-style-type: none"> ◆ knowledge/skills of staff (commitment to develop these through training, etc.); ◆ operational manuals and tools; ◆ clear accountability structures for policy implementation; ◆ availability of expertise; budget allocations; and ◆ partnerships and consultations with women's organizations. 	Good	◆ The institution has developed a positive and supportive environment for ensuring that gender equality perspectives are systematically incorporated in institutional programs.
	Promising	◆ The institution has taken several steps to strengthen the enabling environment and seeks to develop and implement ways to promote systematic attention to gender equality issues in institutional programs.
	Fair	◆ The institution has taken some steps to develop an enabling environment but there does not appear to be current support for further development.
	Of Concern	◆ Few and ad hoc steps have been taken, or there are some measures in place, but there is evidence that major opportunities are missed, that policies, tools or guidelines are not used, or that action on gender equality depends on individual initiative rather than institutional approaches.
<p>5. Institutional Momentum and Commitment The institution demonstrates ongoing commitment to pursue gender equality objectives. This can be seen in:</p> <ul style="list-style-type: none"> ◆ positive trends regarding the strength and profile of a gender equality unit; ◆ trends regarding institutional investments in gender equality; and ◆ speeches and statements by the leadership of the organization. 	Good	◆ The institution has maintained a satisfactory level of commitment to achieve gender equality results and has continued to evolve approaches.
	Promising	◆ The approach has been less than satisfactory, but there is evidence of increasing attention and commitment (e.g., steps to identify and address problems or gaps related to performance on gender equality).
	Fair	◆ There has been some attention to gender equality issues; however, overall institutional commitment appears unenthusiastic and they remain a marginal concern of the organization as a whole.
	Of Concern	<p>◆ There is limited attention to, and investment in, exploring gender equality issues and approaches to incorporating gender equality objectives in programming.</p> <p>OR</p> <p>◆ There appears to be a decline in investments relating to implementing the institution's commitments to gender equality or a downgrading of this policy theme.</p>
<p>6. Gender Balance/ Employment Equity The institution is working toward gender balance in staffing throughout the organization, in particular in management positions.</p>	Good	◆ The organization consistently sets and meets targets and is moving toward equal numbers of women and men, with specific attention at the senior levels.
	Promising	◆ The institution has made recent progress toward equity targets, and there appears to be internal momentum.
	Fair	◆ The organization has set targets for employment equity, but there is not a robust plan to achieve those targets.
	Of Concern	◆ The organization has few women in management positions, and employment equity/gender balance does not appear to be a priority.
<p>Step #2 Overall rating of an institution/organization: see next page.</p>		

Step #2 Overall rating of an institution/organization. To determine the overall rating of the institution, begin with the rating on the first element – gender equality results (left column) – and then the ratings on the other elements. The overall rating cannot be higher than the rating on the gender equality results element, but it could be reduced depending on the performance on the other elements.



Follow-up phase: focused studies

The analysis from the initial phase provides information on which institutions are doing well. It also highlights the elements of institutional strategy or mechanisms (such as the institutional policy framework or the enabling environment), that are consistently strong or weak. Further investigation of these findings would be a means of strengthening CIDA strategies for selecting and/or working with core-funded organizations.

The types of questions that can be pursued in follow-up analyses are suggested below.

- ◆ *For large institutions with which CIDA has a continuing relationship and provides substantial funds:*

What are the common factors among institutions receiving the strongest ratings? Are there similarities in the way in which CIDA has managed its relationship with these institutions? Can particular “success factors” be identified in institutional approaches or in their relationship with CIDA that can inform CIDA’s strategies in working with such institutions?

What could CIDA do better in its relationships with these institutions? Are there particular strategies at executive boards? Are there constructive ways to build alliances with other funders? Is there a link between earmarked funds and progress? What policy dialogue strategies appear to have worked?

- ◆ *For CIDA programs under which many organizations receive relatively smaller amounts of core funding:*

What are the characteristics of partners that perform well? What is the relation between positive performance and the nature of the partner’s mandate and thematic concerns? What is the relationship between positive performance and the organization’s relationship with its own partners in the countries in which it is active?

What lessons can be learned about the selection and relationship with institutions receiving core funding? Can the assessment identify good examples that CIDA could use to inspire other organizations with which it has ongoing relationships?

7. STRUCTURE OF A CORPORATE ASSESSMENT

The previous sections have outlined two assessment approaches to cover the three CIDA business models – one to be used with directive and responsive programming and the other with core funding/institutional support. This final section outlines a structure for a corporate assessment that reflects all of CIDA programming.

An initial aim in designing the framework was to have one approach that could be used across all areas of CIDA investment to provide a consolidated response to the assessment question: *To what extent do CIDA's development results reflect the policy commitment to gender equality?* However, the work on the design and then the pilot indicated the need to make distinctions between different types of programming and different branches. Directive and responsive programming have more in common with each other than they do with core funding.⁸ Accordingly, one assessment tool was designed for directive and responsive programming, with a separate assessment tool for core funding. The pilot of the use of the assessment tool for directive and responsive programming found that the bilateral branches were much more similar to each other than they were to the two branches dealing with international and Canadian development organizations.⁹

An approach that reflects these considerations while continuing to use the categorization of CIDA investments set out in the RoadMap (and used in corporate coding) can be done through a corporate assessment structured into three components (see also the matrix on page 18):

- ◆ *Component 1* would consider the directive and responsive initiatives of the bilateral branches.
- ◆ *Component 2* would focus on the responsive initiatives of the Multilateral Programs Branch (MPB) and the Canadian Partnerships Branch (CPB).
- ◆ *Component 3* would encompass core funding investments across the Agency.¹⁰

Component 1 and *Component 2* use the approach for directive and responsive programming outlined in this framework, and *Component 3* uses the approach for core funding. This approach allows a number of distinctions to be made to increase the reliability of conclusions drawn about Agency performance and to provide a firmer foundation for drawing conclusions related to strategies to improve performance in the future.

8. See Section 3.

9. There are differences on a number of factors, including the type of programming (with bilateral branches combining directive and responsive, while MPB and CPB do only responsive), size of initiatives (with those in bilateral branches tending to be larger), and to branch requirements for results reporting and use of Agency central information systems (with PPRs systematically required in bilateral branches but not in the others).

10. According to the definitions of CIDA's three business models in the new RoadMap, pooled funding and budget support are included in the business model for core funding/institutional support. At the time of the pilot, these types of investments were very new to the Agency, and there were no examples included in the pilot sample of core funding investments. The appropriateness of the core funding assessment tool to pooled funding and budget support would therefore need to be further assessed in planning and implementing a corporate assessment using this framework. (Note that, according to the RoadMap, the core funding/institutional support category would include investments in sector-wide or program-based approaches (PBAs), except where CIDA's participation is in the form of an investment in a specific initiative within a PBA, in which case it is a responsive investment. In such cases, the treatment in a corporate gender equality assessment would be the same as that for other responsive investments.)

With this approach, the initial assessment phase allows for the aggregation of results and insights into patterns of performance on gender equality for each of the three components. Each component maintains an integrity that would give meaning to the aggregation. While there would be three “roll-ups” for the Agency rather than one, the ability to capture the complexity and variety of the Agency’s investments under three components provides a much better overview of the Agency’s performance than has been possible to date.

The initial phase using the assessment tools also provides a firm foundation to design the follow-up phase in a strategic way for each of the three components. This follow-up phase of more in-depth focused studies would be necessary to complement the initial findings to give a better understanding of performance, and derive lessons to guide planning and management for improved performance.

SUMMARY OF THE THREE COMPONENTS OF A CORPORATE ASSESSMENT			
Branch	Directive	Responsive	Core funding
Bilateral branches	<p>Component 1. Assessment of the non-core funding initiatives of the bilateral branches using the approach outlined for directive and responsive programming:</p> <ul style="list-style-type: none"> ◆ <i>Initial phase:</i> use of assessment tool 1 with a representative ample of investments, constructed to allow for valid comparisons between branches and between directive and responsive programming. ◆ <i>Follow-up phase:</i> focused follow-up analyses on issues/project groupings identified through analysis of findings of initial phase. 		<p>Component 3. Assessment of Agency core funding/institutional support initiatives using the approach outlined for core funding of institutions:</p> <ul style="list-style-type: none"> ◆ <i>Initial phase:</i> use assessment tool 2 with a sample of core-funded investments that allows for conclusions that can be generalized to the main categories of core funding by CIDA, that is, investments in large multilateral and regional agencies, investments in smaller international and other non-governmental organizations, and investments in pooled funding or budget support (regarding the latter, see footnote 10). ◆ <i>Follow-up phase:</i> focused follow-up analyses on themes and issues identified in the initial phase, defined separately for bilateral/MPB/CPB core funding to reflect differences in the nature of relationships with partner institutions and the nature of the funding.
Multilateral Programs Branch (MPB)	<p><i>[no directive programming by MPB or CPB]</i></p>	<p>Component 2. Assessment of the responsive programming of MPB and CPB, using the approach outlined for directive and responsive programming:</p> <ul style="list-style-type: none"> ◆ <i>Initial Phase:</i> use of assessment tool 1 with a sample constructed to allow for conclusions that can be generalized to responsive programs in multilateral and partnership branches respectively. ◆ <i>Follow-up phase:</i> focused follow-up analyses on themes and issues identified in initial phase, defined separately for MPB and CPB to reflect differences in programs and funding mechanisms. 	
Canadian Partnership Branch (CPB)			

ANNEX

Accountability for gender equality and CIDA's business models



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ANNEX—Accountability for gender equality and CIDA’s business models

Is the overall assessment question appropriate to all CIDA business delivery models? The framework proposes one overall assessment question: To what extent do CIDA's development results reflect the policy commitment to gender equality? As CIDA accountabilities for development results differ under the three business models (i.e., greater sharing of responsibilities with partners in responsive programming in comparison to directive programming, and in core funding compared to the two others) questions have been raised about whether use of the same assessment question is appropriate for all three models.

The assessment question can be understood somewhat differently for the three business models.

- ◆ To what extent does CIDA’s *directive programming* contribute to gender equality development results?
- ◆ To what extent do partners implementing projects financed through *responsive programming* contribute to gender equality development results through those projects?
- ◆ To what extent are the institutions receiving *core funding* in a position to contribute to gender equality development results?

However, ***under all three business models, CIDA remains responsible for allocating resources in accordance with policy priorities.***

In *directive programming*, CIDA identifies, designs and implements projects. It is accountable for ensuring that project identification and design conform with CIDA policy commitments and for managing contractors toward development results. Assessment findings about gender equality development results achieved through these investments will reflect the extent to which CIDA programs and staff identify sectoral and thematic areas for investment that provide real scope for making contributions to gender equality, and the extent to which gender equality considerations have been an aspect of the quality of design and the management of contractors.

In *responsive programming*, CIDA contributes to projects proposed by others, who take responsibility for design and implementation. Accountabilities for development results are shared, but CIDA remains accountable for determining whether proposals are compatible with CIDA policy and whether proponents are competent to deliver development results. Assessment findings about the gender equality results achieved through these projects will reflect the performance of proponents but also the performance of CIDA managers in selecting projects and proponents that can deliver gender equality results.

Under the *core funding/institutional support* model, CIDA supplements the resources of organizations with which it has common interests and CIDA is not involved in the details of the initiatives funded by the partner. The findings from this initial analysis relate to the gender equality performance of the institutions assessed but also reflect CIDA’s selection of partner organizations and relations with them. CIDA’s accountabilities are for selecting appropriate partners (those that are demonstrating intent and competence in areas that reflect CIDA’s priorities, including equality between women and men) and in supporting partners in managing for results (including gender equality results).

The basic issue therefore remains the same for all business models – whether CIDA development investments contribute to the long-standing development objective of gender equality. Assessment findings will be a reflection of CIDA performance. The chart on the next page summarizes the points made above.

Description of characteristics of the three business delivery models are drawn from the CIDA RoadMap (October 2003)

<p>CIDA'S CORPORATE GENDER EQUALITY RESULTS</p>	<p>Equality between women and men to ensure sustainable development.</p>		
<p>↑</p>	<p>↑</p>		
<p>CIDA'S ROLE and ACCOUNTABILITY BY BUSINESS MODEL</p>	<p>DIRECTIVE <i>"We design; we implement."</i> Investments planned and managed by CIDA (direct involvement through the full cycle of identification, design, contracting, monitoring). (Includes most traditional bilateral programming.) CIDA role: CIDA actively manages the design and implementation of these investments (including management of third parties contracted at design and implementation stages). CIDA accountability: CIDA is accountable for the selection of investments, the quality of design (including compatibility with CIDA policy) and the management of contractors toward results.</p>	<p>RESPONSIVE <i>"You design; we contribute; you implement."</i> Investments planned and managed by others with CIDA financial contributions. CIDA role: CIDA determines the parameters within which investments may be developed, and enters into a dialogue with the proponent about the design and delivery. CIDA accountability: CIDA is accountable for determining whether goals and objectives specified are compatible with CIDA policy, and whether the proponent is competent to deliver.</p>	<p>CORE FUNDING/ INSTITUTIONAL SUPPORT <i>"We have a common interest; let us supplement the resources you have to enable you to do more."</i> Increased resources for development initiatives of other organizations/ institutions due to CIDA financial support (e.g., financial support to multilateral organizations; funding of major non-governmental organizations (NGOs); program-based approaches led by a recipient government or a multilateral organization.) CIDA role: CIDA is not involved in the details of individual initiatives funded by the partner. CIDA accountability: CIDA is accountable for determining whether the actions of the development organizations funded would yield results that reflect Canadian ODA policies and CIDA priorities.</p>
<p>CIDA ROLE AND ACCOUNTABILITY FOR GENDER EQUALITY RESULTS BY BUSINESS MODEL</p>	<p>DIRECTIVE CIDA role: As part of CIDA management of planning and implementation: ♦ identify the gender equality results that can be achieved through the investment; and ♦ manage implementation toward these results. (E.g., identify issues and approaches at selection and design stages; integrate gender equality considerations in selection and contracting of implementing agency; monitor implementation performance.) Accountability for gender equality is part of accountability for quality of design, compatibility with CIDA policy, management of contractors.</p>	<p>RESPONSIVE CIDA role: When determining parameters for proposals, and in dialogue with proponents about their plans for the design and delivery of a project: ♦ require or encourage proponents to identify gender equality issues and results relevant to the proposal; and ♦ include competence to deliver such results among criteria for selection/approval of investments. Accountability for gender equality is part of the accountability for selecting investments compatible with CIDA policy and selecting proponents competent to deliver development results.</p>	<p>CORE FUNDING CIDA role: When identifying organizations with similar objectives and when doing assessments of competence ♦ include attention to the commitment and track record of the organization on gender equality; and ♦ incorporate gender equality considerations into accountability frameworks. Accountability for gender equality is part of the accountability for selecting appropriate partners (those that demonstrate intent and competence on gender equality goals) and supporting partners in managing for results compatible with CIDA policy.</p>