Friends of Publish What You Fund

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Publish What You Fund

Tracking Gender Aid Data for Better Gender Equality

Research Plan

Background & Rationale

There is a global consensus that achieving gender equality and empowering all women and girls, consolidated in Sustainable Development Goal (SDG) 5, is a crucial step in the improvement of overall development outcomes. By adopting the 2030 Agenda for Sustainable Development, 193 countries committed to significantly increase investments to close the gender equality gap.[1] This commitment is translating into tangible results. The Organization for Economic Co-operation and Development's Development Assistance Committee (OECD-DAC) reports that in 2016-2017, its 30 member countries committed more to promote gender equality than ever before: USD 41.7 billion, corresponding to 38% of their bilateral allocable aid.[2] In addition, there are a growing number of financial institutions and funds, such as the Equality Fund and OPIC 2X, which have catalysed financial resources to invest in and strengthen organisations that promote gender equality and economic empowerment.

Despite these important developments, it is difficult to track who is funding what, for what purpose, and with what results. Some funding flows are now being captured through the two largest sources of open aid data: the OECD-DAC and the International Aid Transparency Initiative (IATI). Both platforms have gender policy markers which allow publishers to identify their funding flows as gender related. For example, OECD-DAC data allows publishers to identify projects in three ways, namely those which they consider to be principally (2), significantly (1), or not at all (0) related to gender.[3] IATI takes a similar approach, allowing publishers to apply the gender marker in one of three levels of significance matching the OECD-DAC levels — 0, 1, and 2 – and the less frequently used (and more limited) levels 3 and 4.[4] Despite these tools, development actors struggle to track current and projected gender related financing, and remain unable to trace effectively how, where, and to what effect gender funds are spent. The markers, by themselves, are insufficient to meet most user needs – while they may be an early indication of a gender focus, they are not uniformly applied or used.

If donors and other stakeholders do not fully understand who is spending what, where, and to what effect to address gender inequality, we risk only seeing a portion of the development picture. Meeting SDG 5 will require this kind of robust information, particularly at the country level, in order to direct (or redirect), coordinate, and address the funding gaps, and to hold donors accountable to global gender equality commitments.

This project seeks to fill this need in the gender data space by conducting research into the publication of gender-related financial and programmatic data. The project will analyze publicly available financial data as well as information such as objectives, sub-national locations, and the results of aid and development projects. While the focus will be on traditional aid data, we will also look at the availability of other streams of gender-related resources, such as a country's own budget allocations and funding by international and national non-governmental organizations. We will use the findings to advocate for improvements of gender aid data publication at both the country and the global level to achieve better development outcomes and ultimately to contribute to improving the practice around publication of gender aid data and allocation of resources.

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[1] Transforming our world: the 2030 Agenda for Sustainable Development. Resolution adopted by the UN General Assembly on 25 September 2015 (A/RES/70/1).

[2] OECD-DAC. 2019. 'Development finance for gender equality and women's empowerment: A snapshot.' http://www.oecd.org/development/gender-development/Dev-finance-for-gender-equality-and-womens-economic-empowerment-2019.pdf.

[3] OECD-DAC. 2016. 'OECD-DAC Gender Equality Policy Marker.' https://www.oecd.org/dac/gender-development/Handbook-OECD-DAC-Gender-Equality-Policy-Marker.pdf.

[4] IATI. 2020. 'Policy Significance.' http://reference.iatistandard.org/203/codelists/PolicySignificance/.

Research goal
The main goal guiding this research is to improve gender equality outcomes. The hypothesis of this research is that better gender-related financial and programmatic information will help relevant stakeholders direct (or redirect), coordinate, and address funding gaps, and to hold donors accountable to global gender equality commitments. This is expected to contribute to more effective funding of gender equality programmes, and in turn to better gender equality outcomes on a national and global level.

Research objectives
The purpose of this project is to establish a solid evidence-base on how much is being spent on gender, on what projects and in which sectors, and what results gender equality projects are achieving in-country, including whether resources are targeted to meet identified gender priorities. The findings of this research will inform recommendations to improve the publication of such gender aid data.

Approach
We will use a combination of quantitative and qualitative research methods. Using a country-based approach, we will track the available gender-related aid by the top 3-5 donors in that country to determine what information is available and what is missing. This sequential design involves three stages: (1) a desk review, (2) an in-country field research involving qualitative key informant interviews (KIIs) and potentially focus group discussions[5], and (3) the production of a final synthesis report for each country. Based on this user experience, we will provide targeted recommendations and advocate for changes to the publication of gender aid data at the global level.

Country selection
Three countries will be selected according to criteria informed by desk research, expert discussion, and consultation.

Criteria for consideration for country selection include:

- Low and lower-middle income classifications
- The need for regional diversity
- Safety considerations for in-country interviews (following official UK travel advice)
- Level of dependence on overseas development assistance (ODA)
- Amount of gender-related ODA received by country
- Degree to which the country is/has potential championing gender programs
- Geographical considerations (i.e. country size and weather constraints like monsoon, hurricanes and typhoon seasons)
- Political election cycle (i.e. dates of near future presidential, general, or parliamentary elections)
- In-country capacity and network of INGOs, including Plan International USA (Plan) and Save the Children US (Save)

To identify these countries, we will take a mixed-methods approach. Our first step is to collect relevant data points on every country, including their LDC status/income classification, total ODA received, NET ODA per capita, NET ODA received as a % of Gross National Income, total gender-related ODA received, gender-related ODA received as a percentage of total ODA, SDG Index Rank, SDG Index Score and whether their score is higher than their regional average, and the number of known active projects on IATI with a 1-4 gender policy marker. We will reach out to partner INGOs to better understand their in-country capacity and network, and the political salience of countries.

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[5] We will consider conducting in-country focus group discussions but anticipate that this will be a logistical challenge and perhaps not feasible or ethical with the COVID-19 pandemic.

After an initial selection of five countries, we will do additional desk research and background interviews to determine for which three countries the potential pay-off of conducting this research, meaning the potential uptake of any recommendations, is the highest. To decide this, we will look at the top 3-5 donors in each country and their gender priorities, partner governments' gender priorities, and the percentage of female representation/leadership in partner governments. We will also consider the diversity of sectors receiving gender-related ODA across case study countries to further ensure a varied case study sample. After the final case study selection, we will answer our research questions through desk research, remote expert interviews, and key informant interviews and potentially focus group discussions with a range of stakeholders during in-country visits.

Research Questions

For each case study country, we aim to answer the following questions:

1. What is the current gender context?
    a. What are relevant demographic data?
    b. What are the key gender inequality issues?
    c. What national gender policies, if any, currently exist?
    d. How much money does the national government spend on gender-equality projects?
    e. Which other types of gender equality funding, such as resources allocated by international and national non-governmental organisations (NGOs), funding by feminist and women's funds, and women rights organisations (WROs) or movements' self-generated funding, are being spent on in-country gender equality projects?
    f. Who are the relevant international, regional, national, and local stakeholders?

2. To what extent does the current available gender aid data reflect the situation and gender priorities in-country?
    a. Who are the top 3-5 donors of gender-related aid?
    b. How much do these top donors spend on gender-equality projects?
    c. Which stakeholders are receiving and implementing these gender-related projects?
    d. What do we know about these gender-related projects? (i.e. project description, sector, activity status, length of project, project objectives, sub-national location, and performance)
    e. What do we know about the impact of COVID-19 on gender funding priorities?

3. Can changes to gender-related aid data collection, publication, or access improve the publication of gender aid data to meet stakeholders' information needs? If so, what changes would be required?
    a. If applicable, which stakeholders' information needs, based on their function and decision making in the development space, are not being met adequately?
    b. Can any identified information (quantity or quality) gaps be filled with the current existing structures? If so, which ones, how and by which actors?
    c. Would filling these information gaps require any changes to existing platforms and tools? If so, which ones and in what ways?
    d. Can any changes to gender-related aid data collection, publication, or access be made outside of the current platforms and tools to make information more accessible and usable to stakeholders? If so, which ones, and how?

Methods

Project Preparation and Desk Review
The desk research will review both quantitative and qualitative data. This research will use data made available by the World Bank, OECD-DAC, IATI, UN agencies, and other official data sources. The desk research will also rely on data published by donor and recipient organizations' and governments' own websites and databases.

Quantitative data may include various indicators, including those mentioned in the Equal Measures 2030 SDG Gender Index report from 2019. Examples of indicators are: population breakdown by gender, age, urban/rural, educational attainment, literacy rate, and religious affiliation, GDP- and GNI-related indicators, proportion of the population living below the national poverty line, GINI index score, life expectancy at birth (total, female, and male), maternal mortality ratio, proportion of seats held by women in national parliaments, female victims of intentional homicide, extent to which a state is viewed as legitimate, open and representative score, and openness of gender statistics.

Qualitative data utilized will include a literature review of relevant policy/strategy reports issued by the donor and partner organizations and governments, international organizations and local program implementing organizations. Additional secondary sources may include media reports, think tank reports, and civil society publications. We will establish an informal advisory group of national and international gender specialists, who will advise and support our in-country research.

Sampling
This study will use a combination of purposive and snowball sampling methods. The research will map relevant national and local stakeholders, including representatives from partner government ministries, international donors, program implementing organizations, international non-governmental organizations (INGOs), local civil society organizations, grassroots gender activists and advocates and other knowledgeable actors representing the development community, including academics, gender specialists and others. After the relevant individuals and organizations for the case studies and the technical report have been identified, we will reach out to them, potentially through partner INGOs such as Save and Plan, for background and/or key informant interviews, or focus group discussions.

Key Informant Interviews (KIIs)
To triangulate and complement the desk research, the study will conduct in-country KIIs. The interviews will be semi-structured and based on a common interview guide for each stakeholder group. Due to our diverse case study sample, we will tailor the final interview guides to each case study setting. The study aims to include interviews with representatives from local and national non-government organizations (NGO), including project implementers, community organizations, the partner government, international NGOs and donors' mission offices, and academics. To ensure that the research is as meaningful and culturally salient as possible, the study will recruit an in-country consultant for each country.

Focus Group Discussions (FGDS)
Wherever our capacity and in-country logistics allow, we will aim to conduct FGDs with relevant gender-related stakeholders. Prior to our visits, we will reach out to the identified stakeholders and explore the possibility of conducting an in-country FGD using their existing in-country networks and/or meetings. FGDs will allow for the exploration of agreement and disagreement between stakeholders on relevant issues and the context of data use, and thus further complement our findings.

Consent
In order to ensure prior informed consent of all potential research participants, we will provide them with information about our research, participating in the KIIs and/or FGDs (including confidentiality and the option of anonymization), and the expected duration of the KIIs and FGDs (approximately 30 minutes to an hour or longer if they desire). We will reiterate this information in-person to confirm verbal consent.

Analysis
For the key informants who express that they would like to have their answers presented anonymously in the final report(s), any notes taken during their KIIs and FGDs will be coded and stored separately from any names or other (in)direct personally identifiable information of participants.

Validating findings
To help ensure the accuracy and validity of the findings, the study will create a 'feedback loop' with the relevant research participants by offering to conduct remote follow-up interviews and, potentially, webinars and discussion groups.

Limitations

Case studies: The study is limited to three case study countries. While the case study approach will afford the research a far greater understanding of the situation, the recommendations will need to be carefully made to accommodate this limitation. While this project's findings are not meant to be exhaustive or universally applicable, the study will mitigate this limitation by selecting three different countries - taking into account factors such as their geographic location and their dependency on overseas development assistance (ODA) - to identify lessons that may be applicable to a number of contexts.

Sampling: Purposive and snowball sampling are susceptible to bias, since the organizations and/or individuals identified through stakeholder mapping may be limited by pre-existing networks, knowledge and those organizations with an online presence. To mitigate this, the study will use either in-house expertise (where available) or local, knowledgeable, consultants who will help identify additional stakeholders.

Lack of data & previous literature: One of the reasons for this research is simultaneously a limitation to it: there is inadequate data and research available on this specific issue. This limits the study's desk-review stage. To ensure the key informant interview questions and guide are as useful as possible, the study will conduct background interviews and consult its advisory committee to inform the key informant and potential focus group participants of the questions ahead of the research trips and to develop as comprehensive an understanding of the relevant issues as possible.

Outputs
The findings of the research will be synthesized into the following outputs:

- Case Study Reports
  We will produce short, usable reports on the in-country findings to provide relevant policy makers and advocates with information on how and where gender aid is being spent at the country-level, what results have been reported, and which policy changes are expected to help the current available gender-related data better represent the reality on the ground. We will also include some contextual information on a country's own gender policy and alignment with donor and country government allocations. If possible, the country reports will also attempt to track financial flows from other actors, including the private sector.

- The State of Gender Aid Data Report
  We will produce a separate technical gender aid data report, which will discuss what information gender specialists need, how many of those needs are being presently met, how useful and granular current available data is, specific recommendations for improving data quality, and how mechanisms for sharing data, such as global data standards, might need to improve. We will draw upon the findings of the case study reports, our own research experience, and other background and key informant interviews. The launch of this report will be followed by roundtables, presentations and other dissemination efforts to integrate the findings into the gender data debate and seek uptake of the recommendations.

Activities Timeline																			
Project Preparation	Dec '19	Jan '20	Feb '20	Mar '20	Apr '20	May '20	Jun '20	Jul '20	Aug '20	Sep '20	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	Apr '21	May '21	Jun '21
Methodology Development																			
Formulate Project Advisory Board																			
Case study selection																			
Initial communications																			
Desk Review																			
Stakeholder Mapping																			
Desk Review & Background Interviews																			
Produce literature review (external summary)																			
In-country field trips																			
Recruit in-country consultants																			
Develop Key Informant Interviews (KII) questionnaires & research guides																			
Road-test KII and research guides																			
Prepare in-country consultants, including briefing individuals																			
Plan in-country research trips, including scheduling interviews and logistics																			
In-country research trips																			
Gender Report																			
Compile in-country analysis																			
Produce report, recommendations and comms (incl. drafting, copy & translations)																			
Validate findings / seek comment from research participants (where possible)																			
Launch reports																			
Dissemination																			
Technical & Transparency Report																			
Writing the report																			
Launch reports – incl. time to come up with an advocacy strategy																			
Dissemination																			