

IDRC Learning Study

**Special Expert Advisory Fund for Mainstreaming
Gender in IDRC**

**Projects: 95-0802 , 96-0803, 97-0801,
98-0007**

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February, 2001

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January, 2001

Executive Summary

This study has been undertaken to close files and capture lessons learned from the Special Expert Advisory Fund for Mainstreaming Gender in IDRC. The Fund was designed to promote organisational change and fulfil post-Beijing Canadian government gender mainstreaming commitments. It was also IDRC's main gender initiative from 1995 - 1998. The study provides a brief summary of the history of gender and development at IDRC as background. The Fund operated as four overlapping two-year projects. But they were not "Projects" in the conventional understanding of the term at IDRC.

The Fund was to be used to contract special expert advice from gender mainstreaming consultants at the project level in the regions and, after 1997, to support mainstreaming at the Program and Institutional levels. The Fund aspired to produce a *profound transformation in the Centre's approach to development research as the organisation incorporated a commitment to a gendered perspective into all aspects of its work* (97-0801 project abstract). The Fund's outcome was to be gender-mainstreamed projects and gender mainstreamed PIs, and more gender research projects.

The Fund supported at least 90 activities, some of them related. Most of the activities were not at the project level in the regions and most of them did not involve regional gender specialists. The Fund allowed the Gender and Sustainable Development (GSD) Unit to develop some institutional-level gender support structure. It allowed some Program Initiatives (PIs) to examine gender issues in their theme areas. It supported the creation of the Gender Matters Awards, with a view to increasing regional gender analysis capacity. It supported a number of gender networking and capacity development activities in the general research community, and it served as a funding source of last resort for some interesting small initiatives capitalising on work already done through completed IDRC-funded projects.

This Learning Study was not designed to sum up outcomes of the many and various activities supported by the Fund. Even had the data been available, this would be difficult. Some general observations, however, can be made. The Fund had less impact on IDRC than its ambitious objective. Though outputs and outcomes were not, for the most part the result of supporting the kinds of activities originally proposed, activities funded did nevertheless contribute something towards gender mainstreaming in the Centre. Awareness increased; understanding increased more slowly. Funded activities had an impact on some PIs and resulted in at least one PI funding a gender research project. Lessons learned from implementing the Fund have contributed to decisions in IDRC to allocate resources for gender research projects, to move the GSD unit to Programs and Partnership Branch and to employ a Senior Program Specialist, Gender and Development. The Fund did not transform IDRC. Neither has IDRC just marked time over the years the Fund has been its main gender initiative. But it has moved forward more slowly than it might.

Problems with design, communication and implementation made it difficult for the Fund to use resources to make significant headway on gender mainstreaming within the Centre.

The Fund was a response to an external requirement not sufficiently adapted to internal needs. More care was needed to verify assumptions about how the Fund would operate. The pieces were not in place for it to operate as proposed. PIs weren't ready to use it and if regional gender advisors were available to be contracted, PIs didn't know where they were. In the absence of other IDRC sources of support for small projects and ad hoc activities, the Fund Projects were under pressure to respond to a great variety of demands. IDRC did not make provision for appropriate technical expertise for the design and the implementation of the Fund. IDRC's internal climate reflected the post-Beijing climate outside the Centre and the prevailing gap between words and action on gender mainstreaming.

There are many lessons to be drawn from the Fund experience. If IDRC is to take its equity and effectiveness objectives seriously it will have to put a higher priority on gender and development. An effective approach to gender mainstreaming will be essential. As a research support organisation, IDRC is well placed to become cutting edge in gender mainstreaming. The speed at which IDRC can achieve critical mass for gender mainstreaming will determine the effectiveness of its investment. The more slowly it builds towards critical mass, the more danger there is of it frittering away funds. But IDRC should invest carefully, applying the same analytical rigor and professional expertise to its effort as it demands of the researchers it supports, giving enough time to planning, putting building blocks systematically in place. It should build its gender strategy around the PIs, provide good training, and bring in experienced gender specialists. It should integrate support for small projects with the work of the PIs.

IDRC has lost some time in developing its capacity to contribute to gender and development and to push forward with gender mainstreaming within the Centre. It may have made headway in meeting Federal government gender mainstreaming requirements in comparison with other government departments but it has still far to go to be on the gender mainstreaming cutting edge.

1 INTRODUCTION

1.1 STUDY OBJECTIVE

This Learning study focuses on the mechanism that IDRC set up to meet its gender mainstreaming organisational change objective between 1995 and 1998 - an umbrella Fund packaged and budgeted as four two-year Projects. The Projects overlapped, with a new Project launched each year. When the 1998 Project began, the three earlier projects were all still operational. Two out of four of the Projects have now been closed; two remain open awaiting the completion of outstanding activities.

The objective of the Learning study is a “*reflective review of the approach taken and of lessons learned by the Centre in the process*” of developing and implementing the Fund. It is not a formal evaluation. The "Projects" it should be emphasised, were not projects in the conventional IDRC sense of the word. The Fund was the Centre's principal gender initiative during this period. Although the Fund's focus widened and language evolved in keeping with a changing gender discourse, the Fund's objectives remained fundamentally the same over the years. So a synthesis Learning study is appropriate. Because the Fund's four Projects focused on changing IDRC projects and programs, this Learning study will not be typical and may not be useful as a model for project Learning studies.

1.2 METHODOLOGY AND LIMITS OF THE STUDY

The study is a general assessment of what the four Projects set out to do, what they actually did, why, and what could have been done differently. In principle, to answer these questions each question should be posed of the 90 components or activities that the Projects supported. IDRC did not, however, intend this study to be a component-by-component assessment of the Projects. It focuses rather on the overall objectives of the Project and the degree to which these were or were not met by the activities funded.

The study is based primarily on a file review. Each Project has a general file and a file for each funded activity or component. For activities with significant documentation, there are additional files corresponding to relevant component files. Analysis of Project outcomes is severely limited by the data. It is further limited by apparent confusion in the Centre about project objectives and expectations, by time available for the study, and of course by the difficulty of separating impacts resulting from project activities from those resulting from other influences. In search of possible summary documentation and to provide context, the reviewer scanned some additional GSD documentation (including the web site). Surprisingly, there is little summary information about the four Projects - on outcomes, lessons learned or even outputs. The reviewer also gathered general impressions about the Projects from two or three IDRC staff and from memos to the recently appointed Senior Programme Specialist, Gender and Development.

To facilitate analysis, the reviewer completed a descriptive list of project activities for Project 95-0802, reading all available documentation for activities supported by this Project. The reviewer also scanned documentation on activities funded by the other three projects, permitting generalisations at least about the quality of documentation available for analysis.

Although for purposes of this study, exact quantitative data is not required, the reviewer has produced some summary data on activities that the four Projects supported. It is, like the qualitative observations on activity outputs, indicative only. Time did not permit review of all component files and information in the files is uneven. Documentation needed to assess inputs, such as consultants' qualifications, or outputs, such as project reports, books and other materials, is missing from many files.

The four Projects were internal IDRC projects. Those allocating funds from them were not required to complete normal project cycle information steps, either for the Projects themselves or for the activities supported. Only Projects 97-0801 and 98-0007 have real proposals. For some components there are full proposals, often produced in search of funds from other sources. For others there are none. Even commitment letters are missing from some component files. Though the files are thick, they may contain multiple copies of the same document, interspersed with memos necessary to trace their stories, and memos trying to trace their stories.

1.3 STUDY CONTEXT: GENDER AND DEVELOPMENT AT IDRC

The history of gender and development at IDRC provides a context for locating the Fund Projects. One can distinguish four phases in this history. In considering these phases it is useful to also distinguish three inter-related approaches to the gender and development challenge: gender research, gender mainstreaming and external capacity building (Joeke, 2000). Gender mainstreaming can require internal capacity building, particularly the development or acquisition of gender-based analysis skills. Another gender related issue is that of gender equity in the Centre and in the research organisations and groups IDRC funds. Without articulating through an operational analysis their strategic differences and complementarities, IDRC has shifted emphasis between its approaches to gender and development over the years.

1.3.1 Phase 1: Foundation years

By the 1980s it was dawning on those involved in international development that their initiatives were not improving the conditions of over half the population in developing countries. Systemic gender barriers obstructed effectively improving women's conditions. Research was not uncovering these barriers. Policies were not addressing them. One of the most important predictors of development, everyone learned, is improvement in the status of women. The relationship is not spurious! It is causal! Gender equity considerations are effectiveness considerations.

As a research support organisation, the first approach to the challenge of gender and development for IDRC was to focus on external capacity development. It funded Summer Gender Institutes at Laval and Saint Mary's universities for IDRC project researchers and potential IDRC project researchers. An evaluation of the Summer Institutes in 1992 questioned the rationale for establishing these in Canada and proposed moving them to developing countries. So IDRC supported Laval and Saint Mary's to organise workshops in developing countries.

1.3.2 Phase 2: The need for a strategy

In the early 1990s, funds were available from IDRC for gender projects, which focused on revealing the differential impacts of policies and programmes. But researchers from

developing countries were not bringing them to IDRC and IDRC staff did not know how to encourage them. The Centre needed a strategy.

Following the Earth Summit in Rio and in keeping with its commitment to Agenda 21's gender propositions, IDRC linked its gender approach to sustainable development and established a Gender and Sustainable Development Unit (GSD). To help prepare for the International Conference on Women in Beijing it established a fund to help researchers pull together and share gender research findings in several areas pertinent to the Platform of Action that would emerge from the Conference.

Anticipating the Beijing Platform of Action, the Canadian Government made a commitment to implement gender-based analysis throughout federal departments and agencies. IDRC set up a Gender Liaison Committee (GLC) to be responsible for this. But IDRC did not develop a strategy. Although it was on the cutting edge of many research areas, it was far behind the cutting edge in responding to what was now recognised as one of the major development challenges of the 1990s - the gender challenge. Had IDRC met a challenge that was beyond it? Part of the reason it was lagging behind was undoubtedly its reluctance, in an era of decreasing resources, to reassess its priorities and reallocate funds. But that was only part of the explanation. It seems IDRC did not know how to address this issue, and strangely, for a research organisation, it did not know how to go about finding out.

1.3.3 Phase 3: A lack of strategy

In May 1995, three months before the Beijing Conference, IDRC established the Special Expert and Advisory Services Fund for Mainstreaming Gender in IDRC as a corporate special initiative fund. The Federal Government was encouraging departments and agencies to locate responsibility for gender at the corporate level. Following this model, IDRC located the GSD unit in Corporate Affairs and Initiatives Division. Although IDRC's total 1995/96-research support budget was over \$100 million, the \$185,000 allocated for the Fund would be the Centre's main commitment to gender and development that year. The Fund, with annual allocations only slightly increased, would be its principal gender initiative until 1998. From the figures, it would seem that gender was not a high priority for the Centre during this period.

For the next few years IDRC would treat gender mainstreaming as an alternative, rather than a complementary approach to gender research. The Fund would focus on mainstreaming, developing internal capacity for gender-based analysis, and supporting gender related activities in the external research community. Gender research would be off the agenda except as a secondary outcome of Fund investments.

1.3.4 Phase 4: Putting gender research back on the agenda

In 1998, IDRC moved the GSD unit to Programmes and Partnerships Branch. It expanded the GSD budget to include gender research, with projects to be carried out within one or more of the Centre's twelve Programme Initiatives (PIs). The Special Expert and Advisory Services Fund for Mainstreaming Gender in IDRC was renewed. It was not renewed in 1999, though the GSD budget was maintained. Some activities previously supported by the Fund, such as GSD interns and the Gender Matters Awards, continued to receive support from the GSD budget.

Meanwhile, contributions to project proposals and critiques of a senior sabbaticant from

UNIFEM gave the Centre's professional staff a clearer sense of what gender analysis could be and what an experienced gender specialist could bring to the work of the agency. This, and experience with the Fund, brought home the realisation that IDRC needed to raise gender as a Centre priority, develop a more focused approach and seek experienced leadership. IDRC created and filled the position of Senior Program Specialist in Gender and Development. Discussion on how to move forward is now underway.

2 THE FOUR “PROJECTS”

2.1 WHAT DID IDRC SET OUT TO DO?

2.1.1 Outputs and Outcomes

IDRC designed The Special Expert and Advisory Services Fund for Mainstreaming Gender in IDRC with the goal of promoting sustainable and equitable development through strengthening:

“the implementation of gender analysis and consideration of gender issues in IDRC supported projects” by “using the fund to contract expert advice in gender analysis methodology, usually locally engaged persons.” (1995-0802 project abstract)

Experts were to be well versed in the socio-cultural and gender dimensions in their field and in their region. By supporting the contracting of local consultants the Fund would strengthen local gender analysis capacity. A memo to IDRC Directors, Project Officers and Research Officers announced that the Fund would provide: *“the resources to permit you to engage professionals who will assist you in identifying important gender concerns and then show you how they can be incorporated into your projects.” (June 15, 1995)*

In 1996, IDRC increased the Fund, Project documentation tried to make the intent clearer. The Fund would *“assist research partners and IDRC program staff to explore appropriate methodologies for including gender concerns throughout all stages of the research project cycle.” (96-0803 project abstract).*

In 1997, IDRC said the Fund was intended to help the Centre meet its Corporate Planning Framework II commitment to gender equity. Its outcome was to be *“a profound transformation in the Centre’s approach to development research” as “the organisation incorporated a commitment to a gendered perspective into all aspects of its work”.* (97-0801 project abstract) In 1997, for the first time, IDRC prepared a real proposal for the Fund. It makes it explicit that the Fund can be used for gender mainstreaming at program and institutional levels, as well as at project levels. In particular, PIs could draw upon the Fund to help articulate their program focus with regard to gender issues. IDRC intended that the Fund would strengthen the relationship of regional staff with local gender experts.

For the first time in 1997, project documentation defines expected results: *“The project is intended to increase the number of:*

PIs that integrate gender into the research framework and problematic projects that integrate gender into the objectives, methodology and definition of research problematic

IDRC staff and research partners who demonstrate gender analysis capacity in the context of funded research

research projects informed by a gender equality perspective.”

In 1998, IDRC clarified its intention that an important outcome of gender mainstreaming was to be gender research. The Fund would “*facilitate both the integration and the agenda-setting aspects of gender mainstreaming*”, helping “*define entry points and articulate strategies for including gender analysis and for identifying gender transformatory projects*”. Here IDRC may have been responding to a common criticism of gender mainstreaming, that it merely “fits” women into men’s agendas, rather than building from women’s perspective on development and development priorities or focusing intentionally on the transformation of gender relations.

Each time the Fund was renewed, but without further definition, project documentation re-emphasised that the Fund was meant *for experimental activities and for use in a flexible manner*.

IDRC did not propose that the Fund would put the Centre at the cutting edge of gender mainstreaming, or consider its initiative as a potential subject for research itself.

Diagram 1: Assumed Causal Impact of the Projects

Diagram 1 suggests what appear from project documentation to be the Projects’ expected paths from inputs to outputs to outcomes. For the first two Projects, emphasis was to be on activities to support gender mainstreaming in projects. Funds were to flow through PIs. In the latter two years, with a widened focus, outputs and outcomes were also to be at the program and institutional levels.

2.1.2 Reach

IDRC intended that the Fund be accessed primarily by Centre staff in Ottawa and the regions, and by IDRC researchers and potential researchers (97-0801 project abstract). From the beginning it was intended that the Fund would be renewed annually, with resources focussed on one region at a time, shifting regions with each renewal.

The maximum Fund allocation during the first two years was to be \$40,000, for a

minimum of 5-8 activities. This was reduced to \$20,000 during the Fund's final two years, for a minimum of 11 - 12 activities. The actual number of activities projected for funding, based on average request estimates, ranged from 20 - 30 per Project. Given the overlap between Projects, for 1996, 1997 and 1998 this would also be the average number of activities projected for funding per annum.

2.1.3 How the Fund was to be implemented

The Fund was meant to diffuse the responsibility for gender mainstreaming in IDRC. It was to be administered by the GSD and the GLC. The GLC included GSD program staff, Program officers nominated by the Director General of Corporate Affairs and Initiatives Division, and Regional Gender Focal Points nominated by Regional Directors. The Fund was to be accessed primarily by IDRC staff, and research partners, and in particular, by members of the Gender Liaison Committee (GLC).

2.2. WHAT ACTUALLY HAPPENED?

The first thing that can be said about the Projects is that because of them a lot happened. A lot of work was carried out by those receiving support and by those administering it. IDRC certainly got something from its investment, but not what it intended. Project funds were spent for the most part on other activities than gender-based analysis by expert advisors in the regions. The Projects did not lead to "*a profound transformation in the Centre's approach to development research*". Undoubtedly, however, they contributed something to *incorporating a commitment to a gendered perspective into IDRC's work*".

2.2.1 Outputs and reach

Some general conclusions about the outputs and reach of the Projects can be drawn from summary information in the Tables below and in the list of activities funded in Annex I.

Project #	Funds allocated	Funds spent	Number of activities supported
95-0802	\$185,000	\$161,170.08	18/19
96-0803	\$250,000	\$204,004.25	31
97-0801	\$240,000	still open	24
98-0007	\$250,000	still open	16

Table 1 Funds allocated, funds spent, and number of activities

Over the life of the four Projects, the Fund was accessed around 90 times. Sometimes IDRC treated activities that involved several sub-activities or more than one consultant, as one activity, sometimes as several (e.g. IDRC Gender Workshop, October 1996). Sometimes a single activity or component involved a consultant working on more than one assignment. Most of those receiving Fund support completed activities. The few that didn't did not receive allocations or full allocations. A couple of activities that received funds in advance absorbed much IDRC staff time to get them completed. None of the four Projects (closed or not yet closed) disbursed their full allocation.

Project	Under \$1000	\$1,000 - \$4,999	\$5,000 - \$9,999	\$10,000 - \$14,999	\$15,000 - \$19,999	\$20,000 and over
95-0802	2	6	1	7	1	1
96-0803	6	11	3	4	1	5
97-0801	1	6	4	6	1	6
98-0007	2	1	3	1	1	8
Totals	11	24	11	18	4	20

Table 2 Project allocations by size

Most activities were funded at levels well below the possible maximum. Over half were funded for amounts below \$10,000. Almost 40% were funded for amounts below \$5,000. Project funds were even used by PIs and the GSD for small purchases of films, books and training packages. Over the course of the four Projects there was a steady increase in the amount of funding to projects receiving over \$20,000. This corresponds to the increasing proportion of funds being committed to activities in the IDRC Ottawa office. (Table 3). Some activities also received funding from other sources within IDRC. Many activities that were not IDRC-related received additional funding from sources outside IDRC.

Project	Regional Focus	Asia	Africa	Caribbean/ S. America	GSD/IDRC Ottawa & not IDRC-related
95-0802	Asia	2	8	3	5
96-0803	Africa	2	9	3	17
97-801	Caribbean S. America	2	4	1	17
98-0007	Asia	-	3	1	12

Table 3 Project activities funded by Regional focus

Table 3 shows Project activities by regional focus. Some of these were not actually carried out in the regions (see activity lists in Annex I). Over 70% of activities funded by the first Project had a regional focus, but not Asia, the region intended. For the following three Projects, most funded activities were not regionally focused.

IDRC project level:

GBA design stage assistance
GBA expertise for critiquing proposal
GBA evaluation assistance
Additional project component
Follow-up publication
Dissemination/policy promotion activity
GMA training

IDRC Institutional level:

Workshops
Seminars
Speakers
Interns (regions and Ottawa office)
Professional placements
Gender specialist database

IDRC program level:

Sector/regional summary papers
Workshops
Gender lens tools

External

Conferences
Publications
Workshops and Seminars
Individual conference participation
Other

Table 4: Kinds of Activities Funded

We can conclude, from the kinds of activities in Table 4, figures in Table 3, and lists of activities in Annex I, that funds were not used primarily for project-level gender-based analyses by expert advisors in the regions.

Particularly at the beginning, the Fund supported a number of IDRC project follow-up activities for which support was not available elsewhere in IDRC (Environment Education Small Grants Fund, UN Beijing 1995 Initiative, Publications Fund). After that, the largest allocations were used for work done in Ottawa. Most of these were not region specific.

Requests from within IDRC came mainly from women staff. External requests, received at the corporate level, were directed to the GSD by the men receiving them. Most requests from outside IDRC came from women.

For activities that involved contracting consultants, most of the consultants were Canadians. Most of the funds allocated in response to external requests went to organisations that were not based in developing countries.

From the lists of funded activities in Annex I we can estimate that roughly 15 % of Fund resources were spent on IDRC project related activities; 20% on IDRC program related activities (e.g. SUB Gender and Research Methods Workshop); 40% on IDRC institution related activities (e.g. GSD Unit web site); and 25% on activities resulting from external requests not directly related to IDRC project or program activities (e.g. Support for a Meeting on *Feminism challenges the Heritage of Sociology*). Almost 50% of activities funded by the final Project were in response to requests for support not directly related to gender mainstreaming in IDRC.

Some small projects searching for resources added "gender" to their objectives in order to find support as a Fund activity. But gender was given short shift in final reports (e.g. Singh consultancy on South-South Eco-health Solidarity Project - India; Spence consultancy on pastoral ecology curriculum - Kenya; Shristha consultancy on Ecosystem Approaches to Human Health). The occasional use of the Fund as a source of last resort would continue throughout its existence. This does not mean that the work supported in these instances was unimportant, only that it was not what was originally intended; so activities could not be expected to contribute much to achieving Fund objectives.

Perhaps because there was limited demand for Fund support for intended purposes, IDRC decided to develop some enabling mechanisms to encourage its intended use. Through 1996 and 1997, Project funds were allocated for PIs to promote gender analysis of theme areas. They were also used by the GSD to organize an agency-wide gender workshop, to create a gender specialist data base, to put together gender tools (or at least lists of questions to ask) for PIs, and to establish a web site.

During Project 97-0801, to build capacity for gender-based analysis in the regions, the Fund supported establishing the Gender Matters Award (GMA). It funds researchers, with little or no background in gender-based analysis, to participate in brief gender-training workshops and then to do gender analysis in IDRC projects. The focus of the award shifts from region to region each year in much the same way the focus of the Fund was to shift from region to region.

A couple of observations can be made on the quality of outputs. First, quality varied

considerably. Second, if they involved consultants, quality of work was clearly related to the expertise and experience of the consultant, as well as to those directing them. Third, there seems to be little relation between the quality of work and the amount of funds allocated. With one of the smallest project allocations, for example, Ester Ofei-Abpague completed an excellent analysis, from a gender perspective, of a proposed project on *Promoting Urban Food and Nutritional Security in the Greater Accra Metropolitan Area*. This analysis could have served as a model for those trying to explain to the intended use of the Fund.

2.2.2 Outcomes

The Fund was meant to encourage IDRC staff to support more gender research projects and increase the number of *projects that integrate gender into the objectives, methodology and definition of the research problematic* (97-0801 proposal).

For gender research projects, *"it is clear that IDRC has not been associated with any major achievements in gender-focussed research in any particular thematic area"*. (Joekes, 2000) There was not enough gender research activity in any PI over the course of the Fund to break the surface and get mentioned in documentation of PI activities in general IDRC sources. At a superficial, but nevertheless significant level, had the Fund influenced IDRC, one would have anticipated finding gender and development among the list of key development challenges to which IDRC has responded during the 1990s listed on the Centre's web site. It is not there

GSD interns made two efforts to assess IDRC's progress integrating gender into projects and programs. Examining project appraisals for 118 IDRC-funded projects for 1996-1997, they found 68% identified the projects' gender dimensions. Nineteen project proposals, they felt, included quality gender analyses. Examining the 1997-1998 annual reports for the 12 PIs, the GSD found that 9 PIs were developing gender research guidelines or tool kits for gender analysis, or intending to develop them and the other 3 PIs were funding gender research projects. The GSD did not, however, conclude from their studies that the Fund was having an impact. In fact neither of the GSD studies mentioned the role of the Fund at all.

A project completion report (PCR) study done in 2000, found that 88% of a sample of PCRs completed between January 1, 1997 and September 21, 2000 indicated the project had included a gender component (Maessen, 2000). External reviews of PIs in 2000 found that some PIs and the projects they are supporting are making important contributions on the gender front. Others don't even mention gender. Nevertheless, the *"PIs have, severally and together, probably achieved more than most people realise in gender sensitive research"* (Joekes, 2000).

All of the studies mentioned above demonstrated a good level of awareness of gender issues in IDRC. The GSD studies and the External PI reviews, however, revealed many inconsistencies and contradictions, suggesting difficulties deepening, widening and operationalising the understanding of gender analysis.

It is not clear if the GSD developed building blocks, such as a gender specialist database and a web site, as an outcome of the first Project, realising it was not producing intended outputs, or whether this was inspired by initiatives in other government departments and agencies. It is clear that these efforts, though they absorbed a significant amount of Fund resources, did not produce the outcomes intended - more requests for support from the

Fund for IDRC project-level activities. Furthermore, when this reviewer asked two or three IDRC staff for examples of important activities supported by the Fund, no one mentioned the GSD activities.

Project files are full of reports, books and other materials produced by activities the Fund supported, but there is little to indicate the impact of all the work accomplished. In 2000, the new Senior Program Specialist, Gender and Development sent requests for follow-up information to project officers who had been responsible for three Project 96-0803 activities. One response described exactly the kind of outcome the Fund was set up to encourage. It was a gender review of an issue area carried out within the context of a specific IDRC-funded project by a researcher who was part of the project team. The work had an impact on the development of an IDRC PI and the PI then funded a gender research project. The work proved more generally influential in its impact on the research community, leading to an examining, re-thinking and redefining of gender roles in the issue area (See memo from Necla Tschirgi, Annex II). The other two responses confirmed that the work had been done and reports had been written. One was better than the other. From the responses, no impact of the activities on IDRC projects, program or staff is evident. More letters to project officers might produce more examples of positive Fund outcomes. Positive outcomes may also be mentioned in PI annual reports and the minutes of GLC meetings. For project proposal activities, follow up might discover outcomes if proposals resulted and were funded.

Fund support was used successfully to help with gender mainstreaming in CYMMIT and the CGIAR systems. A team from the Simmonds School carried out the work and the experience they gained contributed to its *"preeminent expertise in the area of conducting gender sensitive reviews of work practices within organisations of different kinds"* (Joeke, 2000). The Simmonds School, however, is not in either a developing country or in Canada.

As so few Fund activities were carried out in the regions, it seems unlikely that the four Projects would have had much impact on strengthening relationships of regional staff with local gender experts. Perhaps the Gender Matters Award will help strengthen this relationship.

Some Fund allocations in response to external requests were used to leverage contributions from elsewhere. Doubtless a number of the activities involved would not have gone forward without IDRC's contribution. Some allocations for activities, even if they had little clear relationship to research, may have contributed directly to policy change (e.g. support for participants to attend a post-Beijing regional meeting of the Association for African Women for Research and Development (AAWORD)).

Lessons learned from implementing the Fund may have contributed to three institutional changes that will influence IDRC's future approaches to gender. First, the Centre has realised that a gender mainstreaming approach is not sufficient in itself to produce gender projects. So, IDRC is again funding gender research projects. Second, IDRC learned from its experience with the Fund that what might be an appropriate location for the coordination of gender mainstreaming in various Federal Government Departments is not the most appropriate location at the Centre. As IDRC's mainstreaming objectives have been defined primarily in terms of the programs and research it supports, responsibility for coordinating gender mainstreaming has been moved from Corporate Affairs to Programs and Partnership Branch. Third, IDRC has realised that to effectively diffuse responsibility for mainstreaming gender throughout the Centre stronger technical support

is required. So it has now brought aboard a Senior Program Specialist, Gender and Development.

2.3. WHY DID IT HAPPEN?

To understand why the Fund produced the outputs and outcomes it did, rather than those primarily intended we need to look at its design process and design, its implementation, and how design and implementation were influenced by both the larger IDRC organisational environment, and by IDRC's external environment.

2.3.1 Design issues

To speak of a design process and design for the Fund is perhaps misleading. Even though the Fund would dispense almost \$1 million and be IDRC's main gender initiative for the next four years there was little time and effort put into its design. IDRC did not make the same project design demands of the four Projects which make up the Fund as it does of projects it funds externally. The first two Projects did not have full proposals. For the third and fourth Projects, both proposals and appraisals were carried out by the same person.

IDRC created the Fund in response to an external requirement to mainstream gender. Although IDRC proposed important organisational change objectives for the Fund, it did not consult with organisation change specialists who could have helped develop a staged implementation plan of steps and building blocks for achieving objectives. The Fund supported organisation change specialists for gender mainstreaming in CYMMIT and the CGIAR systems. But IDRC did not feel it needed such assistance itself.

There was little internal consultation on the design of the Fund. Internal participation at the design stage could have helped assure needed input about opportunities, obstacles and needs and encouraged support for implementation. An opportunity analysis would have helped IDRC identify as potential catalysts for gender mainstreaming the staff most likely to understand gender-based analysis quickly, those already trained in social analysis, its sociologists and anthropologists.

There seems to have been no clear agreement on how the Fund was to be used. There were stated objectives, but component documentation indicates perhaps there were other objectives. This made it difficult to design an implementation strategy and to refuse funding to activities unlikely to contribute to intended objectives. Perhaps to legitimise early choices, each time the Fund was renewed IDRC widened its objectives; each time it stated them more ambitiously.

IDRC's tendency to *conflate mainstreaming and capacity building* (Joekes, 2000) contributed to the confusion about the Funds' objectives. This can be found, for example, in documentation for Projects 95-0802 and 96-0803 where objectives don't just further elaborate the mandate, but add elements, which contradict it. A careful analysis of outputs, outcomes and rationale before the first Project was launched might have resulted in the design of several funds. Putting too many objectives, stated or unstated, under the same umbrella, diluted the message about Fund's prime intention and mitigated against its achievement.

The original idea of providing funds for regional gender experts to advise on gender

analyses was good. The idea of spreading gender-mainstreaming ownership throughout the Centre was also good. For these ideas to work, however, IDRC needed to verify two key assumptions.

The first assumption was that gender specialists were available in the regions. IDRC's idea of focusing on one region at a time suggests that it thought it would be swamped with requests from the regions. That it wasn't suggests it may not have verified that gender specialists were available in the regions. That it decided to have Project 96-0803 support the creation of a gender specialist database, provides additional evidence that perhaps this assumption had not been verified.

Had the creation of regional gender specialist databases preceded the launch of the Fund, IDRC might have discovered there were few appropriately trained and experienced specialists available. And had it discovered this, it would have had to address it. If IDRC assumed those trained through its earlier Laval and Saint Mary's University projects were appropriately trained and out there to be called upon, there is no indication of this, or that they were called upon. Perhaps they were now all in salaried positions and not available for short-term contract work.

The second key assumption underlying the Fund that needed verification was that PI staff members were ready and waiting for the resources the Fund would provide. When the Fund was launched IDRC was in the process of organising the PIs. It was the perfect time to think about preparing them to be at the heart of IDRC's gender mainstreaming effort. But PI staff members were not ready for this yet. They needed gender based analysis training, good tools, strong conceptual documentation, and strong technical support to help them explain gender analysis to project partners. When IDRC launched the Fund they had access to none of these.

2.3.2 Communication issues

There is little evidence in the Project files that when IDRC launched the Fund it provided the kind of information and introductory activities that PI staff needed. The initial choice of Fund activities, not particularly good examples of activities required for project-level gender mainstreaming, sent confusing messages about how it was to be used. Staff needed high quality (specific and operational) documentation about key players such as *research partners* and *gender experts* and about key concepts such as *gender mainstreaming* and *gender analysis*. In 1997, IDRC constructed a GSD web site to help address the latter. But even today, where the site announces examples of gender-based analysis those it provides are not sufficiently elaborated.

2.3.3 Implementation issues

Although in some Federal government departments it was appropriate to put responsibility for gender mainstreaming at the corporate level, this was not appropriate in IDRC. Given the Fund's project and program objectives it should have been located in Programs and Partnerships Branch.

From the first activities supported, the message about the kinds of activities that the Fund was to encourage became less and less clear. Some Project Officers, when submitting activities for possible support, flagged the lack of relation between their requests and Fund objectives. Their requests were supported anyway.

It was clear from the first Project that the notion of regional focus was going to be difficult to implement, but IDRC continued to propose a regional focus for each subsequent Project. There is no evidence that IDRC made special efforts to pave the way for requests from the region of focus or turned down requests for support because they were not from these regions.

To generate requests, the PIs needed strong technical support. Such support wasn't available. *"It is not easy to convince the sophisticated research specialists who comprise IDRC's programming staff that their work has been deficient, or that their work needs to incorporate a new dimension. The task is especially difficult when undertaken by a junior professional, as in the many cases when interns were given such assignments."* (Joeke, 2000) Junior professionals worked hard to administer the Fund, but without senior gender specialists to mentor them, advise them, and back them up, it was difficult. Good gender analysis consultants were hard to find. Many were trying to help fill the gap. It was not easy, without a lot of experience, to distinguish between them. From a sample of CVs available it appears that some of the consultants contracted had no experience with gender issues. Many did not even have the academic disciplinary backgrounds normally considered a requirement for gender analysis.

The challenges of providing good technical support and keeping the Fund on track were increased by the time requirements of managing many small allocations. Time requirements for initiatives like the GMA are particularly onerous. To decrease the administrative burden, IDRC seems to have interpreted *experimental* and *flexible* to mean little documentation was to be needed for approving and monitoring activities. But, because of staff turnover, poor documentation increased the work burden as new staff struggled to trace commitments and obligations.

2.3.4 Evaluation issues

IDRC did not design an evaluation into each Fund Project. It did not evaluate any of the Projects. And evaluations were not required of activities, despite their perhaps *experimental* nature. Each new Project started with only passing reference to the previous one. Lessons learned from evaluations of the first Project, or the first two Projects, might have led IDRC to sub-funds. Under the Fund's umbrella this is what happened with the creation of the GMA Awards. But with the GMA Awards under the Fund meant the level of technical support, documentation and analysis would not be much better than for other Fund activities.

2.3.5 IDRC organisational environment

In 1995, the time for gender mainstreaming at IDRC looked appropriate given the Beijing Conference, Federal government mainstreaming requirements, and program reorganisation. The level of commitment for gender mainstreaming, however, was low. The Centre did not have a critical mass of staff who understood gender analysis. Many professionals were apprehensive about gender's advocacy reputation, fearing it would compromise their own and the Centre's reputation for objectivity. A transition of nomenclature from WID to WAD to GAD had been received as cosmetic. Long after the relation between status of woman and development had been established and the contributions of gender analysis to more effective development interventions demonstrated the fear of delegitimisation through association hung on.

IDRC leadership was perhaps also sensitive to the advocacy issue. Preoccupied by

financial constraints it did not aspire to making IDRC a leader on gender issues. It aspired to filling Federal government requirements, or giving the appearance of trying. It did not put enough support behind the effort to ensure its success.

As it moved to more focused programming, IDRC had stopped providing funds for small, ad hoc or one-off activities like seminars, workshops, and support for participation in conferences. Researchers who had received such funds in the past, however, continued to come through the door with requests. So the *flexible* and *experimental* gender-mainstreaming fund, as the only small projects fund available, was bound to feel the pressure.

2.3.6 The external environment

Through the mid 1990s, the gender picture at IDRC was not that different from the gender picture elsewhere. There was a huge gap between gender talk and gender action. Gender issues were high profile. Governments were making promises. But they were not making adequate budget commitments to implement their promises. It was an era of cutbacks. The difficulty of getting the idea of gender analysis and gender mainstreaming across was widespread. Many hoped that with a few superficial changes of language the appearance of gender mainstreaming would be achieved. This would be enough. Much passed for gender analysis that wasn't, increasing the general confusion. Everywhere the qualifications, experience and the time required for gender analysis and for teaching others how to do it were being underestimated.

There was, however, another external environment for gender. In women's organisations, in the research community, in university women's studies programs, in some UN agencies, and in those corners of government departments, thanks to persistent staff, mostly women, progress was being made on gender indicators, gender mainstreaming, the gender discourse and on women's research priorities. Like IDRC, many funding agencies set up small project funds to address gender and development. As a result, when organisations from this environment looked for support for their work they had to cobble funds together from multiple sources. Often they spent as much time making requests and writing reports for funders as on carrying out project activities.

IDRC, over the life of the Fund, reflected the influence of the dominant external environment. It was the latter, however, that produced many of the requests for support that helped divert the Centre's gender mainstreaming intentions. They were requests that in 1994 and 1995 had put on Beijing clothing to take advantage of funds available for Conference preparations. Once the Conference was over these funds dried up quickly. The IDRC gender mainstreaming Fund, though this was not its intention, played an important role in helping some organisations survive the immediate post-Beijing era.

2.4 WHAT ARE WE GOING TO DO DIFFERENTLY, OR THE SAME, NEXT TIME? WHAT COULD WE DO DIFFERENTLY?

This question is posed from the perspective of an insider already knowledgeable about developments underway or under consideration in the Centre, perhaps with even some responsibility for them. For an outside reviewer, however, responses can only build from

the previous section, drawing on personal experience and expertise, in this case in organisational analysis and change. There are some responses that would seem to follow fairly clearly from the above analysis. There are many that may seem naïve and obvious. If so, the question rests even more seriously as to why they were not proposed during the Fund's design and implementation.

The Fund was an organisational change initiative, so the response to this question is, presumably of interest to those responsible for organisation-wide change. From the experience of the Fund it seems appropriate to conclude that "Projects" are not the best way to package an organizational change initiative and there would not be a "next time" for such a Fund in IDRC.

2.4.1 Make the same, or greater, demands of internal initiatives as of external projects.

It would contribute greatly to the effectiveness of IDRC's internal initiatives if they had proposals, if they were based on needs and opportunities analysis, and if they built on known Centre strengths. IDRC would learn more from these kinds of initiatives if they designed and carried out evaluations for them. Effective implementation towards intended objectives would be more likely if IDRC selects those for implementing them as carefully as it scrutinises the qualifications of those carrying out research projects.

2.4.2. Make gender mainstreaming part of an integrated gender and development strategy

If IDRC is to take its equity and effectiveness objectives seriously then it needs to put a higher priority on gender mainstreaming as part of a larger gender and development strategy and invest enough funds to achieve critical mass as quickly as possible. As long as IDRC remains below a critical mass of staff understanding of gender analysis, there is a danger that funds invested will, in terms of influencing its own programs and projects at least, be frittered away. That said, IDRC should also invest carefully, providing the time necessary for planning and for putting in place all the pieces it needs to go forward.

2.4.3 Seek advice from organisation change specialists

For gender mainstreaming, IDRC would benefit from the advice of organisational change experts who can help facilitate a participatory process to develop a mainstreaming strategy.

2.4.4 Put the PIs at the heart of the mainstreaming strategy and give them the tools to do the job

Change can be a slow business. But a careful selection and preparation of change agents could accelerate it. The Fund intended that the PIs would be the key agents in gender mainstreaming for the Centre. But it did not give them the tools they needed to do the job. For the PIs to be "*the major stakeholders in the effort to enhance gender-based analysis in their programming*" and have responsibility for monitoring and reporting on gender in their programs (Joekes, 2000) a number of things need to be done differently.

The PIs need to be responsible for developing their own gender strategies. To do this they need to start by analysing what has been achieved in their areas to date, including

Fund supported activities and all those \$100,000 plus projects for which, since 1992/93, IDRC has required gender analysis; differentiating among those intended to increase PI gender mainstreaming capacity, researchers' mainstreaming capacity, project gender analysis, and external capacity building. Follow-up for project impacts on a selection of projects could be particularly useful (e.g. as in Annex II).

PIs could contract consultants for this work if necessary. But it would be best if consultants could use participatory research processes. This way PI staff could learn the lessons of the analysis as they emerge, assess project contributors who could facilitate further work, and identify documents produced that might be useful in the future. (If PIs carry out analysis in such a way that it can be aggregated at the Centre level by region and country, IDRC will have a full picture of its mainstreaming progress to date.) Out of their analysis PIs could develop their gender strategies and tools, or revise any existing tools they already have.

If possible, each PI needs to have at least one team member with solid gender expertise able to provide technical support or propose where to find it, to help researchers develop gender research proposals, and to assure gender is integrated into all projects. This team member needs an intensive gender analysis training opportunity, if they haven't already had such training. The logical place for IDRC to start building gender analysis expertise is with its sociologists and anthropologists since they already have a background onto which gender analysis training can fasten easily.

Other PI members need to have the opportunity to participate in shorter gender analysis training opportunities. Trainers need to be chosen carefully.

Tool kits will be more useful after training.

Support for external capacity building could be linked to PI themes and PIs could administer the funds. The workload related to small project funding can be made lighter by avoiding advances and assuring project documentation includes essential information. If PIs provide support for small projects out of umbrella funds, the aggregate effort should be described and analysed on a regular basis, perhaps within the context of annual reports. Even the smallest activity should have a proposal and a streamlined PCR (e.g. based on the 5 Learning Study questions).

The GMA needs to be evaluated. If it is found to be achieving objectives, the responsibility for it could be distributed to PIs, with each PI deciding whether the GMA contributes to its gender strategy, and if so, administering it.

In supporting external capacity building, where possible a PI could involve a specific and appropriate regional institution, making it the focus for gender-related research and policy capacity development. This would help develop critical gender and development mass in developing countries.

2.4.5 Examine gender and development expertise requirements carefully

IDRC needs to recognise that it may be difficult to find the background and expertise for gender mainstreaming and gender research in the same person

IDRC needs to be careful not to accept gender interns if there are no gender specialists able to provide mentoring.

The more carefully IDRC can choose its gender consultants the better. Trying to have work, particularly organisational change work, done by junior consultants when it really needs consultants with more experience, may prove a false economy. It might be a good idea to have consultant CVs in the GSD database analysed and ranked by a group of the most senior gender consultants the Centre can find, using an evaluation tool to identify regional and thematic areas of competence as well as particular skill sets.

To help develop capacity, IDRC could consider partnering senior consultants with junior consultants from developing countries and use consultants from other developed countries only if they are partnered with consultants from developing countries or Canada.

When supporting project level gender analysis (e.g. for the GMA), it makes sense to identify those with disciplinary backgrounds propitious to gender analysis training.

2.4.6 Prune and improve gender information for internal uses

There is a need for better, not more, information about gender issues and gender strategies for IDRC staff and researchers. It would be helpful for PIs if full examples of good gender analysis at the project and program level could be made available.

2.4.7 Analyse and improve institutional level initiatives

Recognition of the need for an integrated gender and development strategy at the institution level and commitment to developing such a strategy is crucial. In preparing such a strategy IDRC might start by assessing its past. In particular it would be useful to assess Fund activities directed by the GSD of over \$20,000, given that their intended impact was Centre-wide.

Good monitoring of achievements and annual reports about achievements and priorities for the coming year could also be helpful. Preparation might offer an occasion for reflection and analysis, raise the profile of gender and development, and provide a good communication tool.

To help build support for gender mainstreaming, IDRC could also consider providing gender analysis training for corporate level staff, including staff of Evaluation Division.

2.5. Additional comments

IDRC has lost some time in developing its capacity to contribute to gender and development. It could by now have developed cutting edge gender research and such expertise in gender mainstreaming that it would be marketing it to other organisations,

Instead, the realization that gender based analysis and gender equality are at the heart and not the periphery of the development process is making its way slowly in IDRC. It will

accelerate as researchers who have received gender based analysis training elsewhere or been exposed to the gender and development discourse elsewhere come to IDRC with their projects. To contribute significantly IDRC will have to make gender and development a higher priority.

IDRC's current revenue is over \$130 million. Of this, at least \$90 million is a parliamentary grant. There are 1000 IDRC-supported projects in progress (IDRC Annual Report, 1999/2000). It would seem reasonable to expect, even if the Centre does not want to make gender and development a high priority, a more larger allocation to related activities than it has been prepared to provide in the past, and a more strategic approach to developing them.

This would seem to be a good moment for IDRC to take a more strategic approach. The existing gender support infrastructure is virtually empty, with the recently appointed gender specialist having taken on other responsibilities in the Centre and the remaining intern working on her own personal project. IDRC could reach critical mass quickly if it could find the resources to make at least a short-term commitment (3-5 years) by finding gender specialists for each of its three divisions (ENRM, SEE, and ICT) and a gender mainstreaming and organisation development specialist to the Office of the Vice President, Programs and Partnership Branch.

There should come a point at which a separate locus for gender mainstreaming expertise should not be required, and where special funds to add gender to projects should no longer be needed. But IDRC is still far from that point.

Use of this Learning Study

This study, if circulated for additional contributions, could be part of a larger study of the history of gender and development at IDRC, to include an analysis of GLC minutes and an analysis by PIs of initiatives in their areas. Much may be lost if project activity files are stored away without distributing some of the interesting material in them.