

CTIP MEL Toolkit: [CHECKLIST]

CTIP M&E Toolkit: Checklist for Gender Equality and Social Inclusion (GESI) in MEL and Research

This document provides a checklist with guidance regarding issues related to Gender Equality and Social Inclusion (GESI) in MEL. This document aims to help the user think about whether GESI has been appropriately integrated into their MEL (Monitoring, Evaluation & Learning) project. Please refer to the 'CTIP M&E Toolkit: GESI in MEL and Research Summary' for further explanations and definitions.

I. Designing and Delivering MEL to be GESI-responsive

- Do you contemplate GESI considerations from the design stage of your project?
- To what extent do you consider GESI throughout the MEL process?
- Do you report on GESI in research design, methods selection, and research conduct?
- Do you include an evaluation scope, criteria, questions, and GESI-responsive methodology, tools, and data analysis, including disaggregated data?
- Do you undertake GESI-responsive monitoring?
- Have you integrated a GESI-responsive situation analysis into your MEL system?
- Are your objectives, outcomes, outputs, and activities GESI-responsive?
- Are you using GESI-specific indicators?

Appropriate methodology

- Do you consider your MEL approaches flexible?
- How do you secure genuine participation in your research methodology?
- Are you inclusive in your GESI selection of the participants as well as the methodology?
- Do you ensure participation opportunities through partnerships with third-sector organizations and for speakers of languages other than English?
- Do you involve both men and women in constituent/beneficiary consultations and analysis?
- Do you use a mixed methods approach?
- Have you considered including participatory approaches in the design?

How to design a GESI-responsive MEL Plan¹

- Does the situation/baseline study capture the relevant GESI concerns?

¹ This section has been drawn from the International Labor Organization. *Guidance Note 3.1: Integrating gender equality in monitoring and evaluation*, June 2020. Access document [here](#).

- Are special budget provisions for gathering GESI-responsive information necessary?
- Are sufficient capacities in place for gathering GESI-responsive information and conducting GESI analysis?
- Is there someone in the team with the necessary expertise? If not, where can it be obtained? What kind of capacity building is needed?
- Has the M&E plan been circulated for comments to the responsible GESI specialist or GESI focal point?

How to write GESI-responsive indicators

- Are the project indicators and milestones/targets GESI-inclusive?
- Do project indicators need to be revised/refined to better capture the project's impact on GESI? (both through qualitative and quantitative indicators)
- Which methods and tools do you use to collect GESI-inclusive data?
- Do you have a representation of different groups in samples?
- Does the MEL plan require that all data be disaggregated?
- What disaggregated data does the MEL plan require?

What disaggregated data are needed?

- Do you collect disaggregated data?
- How do you disaggregate your data?
- Do you disaggregate your data by various stakeholder groups (e.g., sex, ethnicity, age, religion, etc.)?
- How do you decide which data to collect?
- Have you considered the following questions?²
 - Who does the activity target – men, women, people with disabilities, religious and/or ethnic minority groups?
 - What other information is available in the implementation plan or activity description about the activity and groups likely to be impacted?
 - What do the baseline data tell us about the problem the activity is trying to address?
 - Are there any groups that face multiple or complex forms of discrimination?

How to collect disaggregated data

- Have you considered the following questions?³
 - How can you ensure that quantitative data collection methods will accurately represent target groups?
 - What are the right tools to collect qualitative data?
 - Are there any religious, cultural, or ethnic sensitivities that may influence who/how data can be collected?

² This list of questions is taken from the [Asia CTIP GESI Toolkit](#), developed by USAID and Winrock International.

³ This list of questions is taken from the [Asia CTIP GESI Toolkit](#), developed by USAID and Winrock International.

- If data are collected through small group discussions, will women participate if men are present?
- If data are being collected from remotely or by a third party, how do you monitor the process?
- How will data be collected from survivors or people with a history of trauma or gender-based violence?
- How can you make sure that data are collected from people living with disabilities?
- Who will collect the data?
- Have the data collection officers (male and female) been trained?
- Has the impact of the identity characteristics of the data collection officers on participants been considered?
- Where will data be collected?

GESI-responsive analysis

- How regularly do you analyze your information and critically reflect upon it?
- Are the effects of the interventions on GESI-related issues regularly analyzed? Is someone specifically assigned to do this?
- Do you analyze the intersections of dis/advantage such as race, socio-economic background, and gender?
- Do you analyze the effects an intervention has on power relations between men and women?
- Do you analyze the effects an intervention has on power relations with other marginalized individuals and groups?
- Is information being collected and analyzed to help assess the different effects of an intervention on both men and women?
- Is information being collected and analyzed to assess the different effects on people with different economic and social backgrounds?
- Do you recommend actions to improve the effectiveness of an intervention to address the different needs of individuals?
- Do you consider the distinctive attributes of individuals that might condition/marginalize them?
- What expected effects does the intervention have on GESI-related issues? And unexpected effects?
- Have you thought about how to shift power in the communities you work in?
- Have you considered alternative ways to promote local knowledge and approaches?

GESI-responsive reporting

- Do you reflect on a GESI analysis in the presentation of findings, conclusions, and recommendations?
- Are your reports explicit and clear regarding GESI?
- Is information on the nature of your decisions publicly available?
- Has the project established mechanisms to share knowledge related to equality, diversity, and inclusion?

- Has the format and structure of outputs been designed in response to GESI considerations?

II. Evaluations through an GESI-lens⁴

- Regarding your Terms of Reference for evaluations, do you require the inclusion of an assessment of impact on GESI and GESI expertise in the evaluation team?

Inclusive

- Do your evaluations consider all affected groups, stakeholders, and rights bearers?
- Do you disaggregate groups by relevant criteria such as women/men, economic class, age, ethnicity, religion, etc.?
- Do you pay attention to which groups benefit?
- Are you attentive to which groups contribute to the intervention?

Participatory and reflective

- Do your evaluations engage different stakeholders in meaningful ways (ensuring listening to what they have to say and letting them know about how the evaluation will be done)?
- Do stakeholders participate in the design, implementation, and monitoring of the intervention?
- Do they participants have the opportunity to report and reflect upon their engagement in the intervention and in the evaluation itself?

Respectful

- Do your evaluations treat all stakeholders with respect for their culture, language, sex, location, and abilities?
- Do you develop appropriate ways to engage and be accountable to them?

Transparent and accountable

- Is the design and conduct of your evaluation transparent and responsible?
- Are the results publicly accessible (in languages and formats that facilitate access for stakeholders)?
- Is feedback provided to stakeholders about the process, results, and use of the evaluation?

Mixed methods

- Do your evaluations use a mix of qualitative and quantitative methods to gather and analyze disaggregated data by sex and other relevant categories?

⁴ This section has been drawn from the International Labor Organization. *Guidance Note 3.1: Integrating gender equality in monitoring and evaluation*, June 2020. Access document [here](#).

III. GESI within the research workforce and stakeholders

- Have you embedded GESI considerations in your organizational policies and ways of working?
- Does your organization have a specific GESI policy, with associated activities?
- Does your workforce include staff with identity characteristics and backgrounds found in the affected populations that your interventions target?
- Does your MEL team include staff with identity characteristics and backgrounds found in the affected populations that your interventions target?
- Do you have an established process—internal or external—for review, monitoring, and accountability in relation to research and MEL ethics?
- Is your MEL language and terminology accessible and easy to understand?
- Who participates in creating the Terms of Reference (ToR) in your organization?
- Do you consult partners and beneficiaries?
- Are they involved in setting the purpose of the evaluation, the key questions, the outputs, and the methodology?
- Who has designed the monitoring and evaluation matrices and tools that you are using?

IV. How do you assess whether you are effectively addressing GESI?

- What are the possible long-term effects of GESI-related issues? What can be learned from that?
- How does the project strategy need to be adapted to increase the GESI-responsiveness of the intervention?
- Are the effects of the interventions on GESI-related part of every progress report?
- Does the report explicitly address the GESI-responsiveness and GESI-related performance of the project?

▪

