

Evaluation Report

UNIFEM's Work on Gender-Responsive Budgeting



Gender-Responsive Budgeting Programme: Morocco

Evaluation Unit
2009



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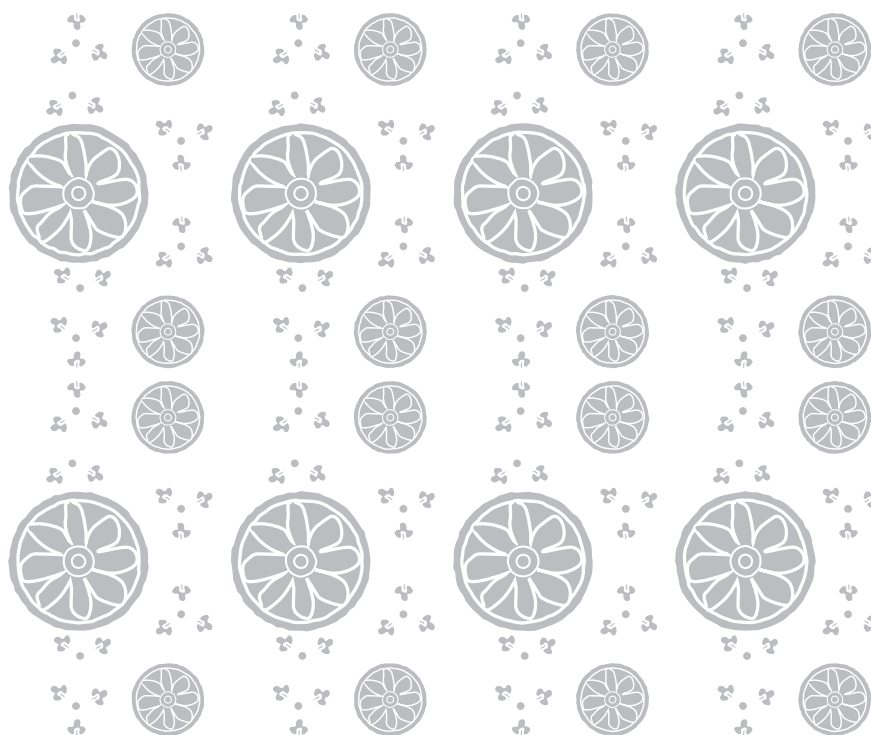
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Gender-Responsive Budgeting Programme: Morocco

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2009

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Contents

	Acronyms	6
	Executive Summary	7
1.	Purpose of the evaluation	11
2.	Evaluation objectives and scope	13
3.	Evaluation methodology	15
4.	Context of the programme	17
5.	Description of the GRB Programme	19
	5.1 The GRB Programme's theory of change	21
6.	Programme results	25
	6.1 Relevance	25
	6.2 Effectiveness	28
	6.3 Sustainability	36
7.	Programming strategies	39
	7.1 Capacity-building	39
	7.2 Sector piloting	40
	7.3 Evidence-based advocacy	41
	7.4 Partnerships	42
8.	Programme management	45
9.	Conclusions	47
10.	Lessons learned	49
11.	Recommendations	51
	ANNEXES	53
	Annex 1:	55
	Terms of Reference for the Corporate Evaluation of the Programme	
	Portfolio UNIFEM's Work on Gender-Responsive Budgeting	
	Annex 2A-2D:	65
	Evaluation Matrix, Interview Record Form, Evaluation Questions, and	
	Framework for Country Contextual Analysis	
	Annex 3:	89
	People Interviewed	
	Annex 4:	93
	Documents Used	
	Annex 5:	95
	Morocco Log Frame Outcomes and Outputs	
	Annex 6:	99
	List of Workshops and Seminars Delivered Through the GRB	
	Programme: Phase II	
	Annex 7:	101
	Focus Group Questionnaire	
	Annex 8:	103
	Focus Group Questionnaire Answers	
	Annex 9:	109
	Analysis of Indicators in the 2009 Gender Report	

Acronyms

ADFM	Association Démocratique des Femmes du Maroc
ADS	Agency for Social Development
AfDB	African Development Bank
CBIS	Municipality-Based Information System
CBMS	Community Based Monitoring System as a basis for the development of CDP
CDMT	Medium-term Expenditure Framework [MTEF]
CDP	Municipal Development Plans
CEDAW	Convention on the Elimination of Discrimination against Women
CIDA	Canadian International Development Agency
DAAG	Directorate of Administrative and General Affairs
DB	Directorate of Budget (DB)
DGCL	General Directorate of Local Authorities of the Ministry of Interior
DERD	Directorate of Teaching, Research and Development, Ministry of Agriculture and Maritime Fisheries
DLNFE	Department of Literacy and Non-Formal Education
DPEF	Directorate of Studies and Financial Forecasting
DVT	Department of Vocational Training
EFR	Economic and Financial Report
EVAW	Eliminating Violence Against Women
FAES	Fonds d'Appui à l'égalité entre les sexes
GBV	Gender Based Violence
GRB	Gender-Responsive Budgeting
GSB	Gender-Sensitive Budgeting
GTZ	German Technical Cooperation
HCP	High Commission for Planning
ILO	International Labour Organization
INDH	National Initiative for Human Development
KM	Knowledge Management
ME	Ministry of Employment
MEF	Ministry of Economy and Finance
MEN	Ministry of National Education
MMSP	Ministry of Public Sector Modernization
OECD DAC	Organisation for Economic Co-operation and Development - Development Assistance Committee
PRSP	Poverty Reduction Strategy Paper
RBM	Results-Based Management
SEFEPH	Secretary of State in charge of the Family, Children and the Disabled
SEJ	State Secretariat for Youth
UNDAF	United Nations Development Assistance Framework
UNDP	United Nations Development Programme

NB: Most acronyms refer to French names

Executive Summary

Purpose, scope and methodology of evaluation

SDDirect has been contracted by UNIFEM's Evaluation Unit to conduct a corporate evaluation of UNIFEM's global work on Gender-Responsive Budgeting (GRB). This summative report documents findings and recommendations from the country assessment in Morocco during Phase II of the GRB Programme "Strengthening Economic Governance: Applied Gender Analysis to Government Budgets", funded by the government of Belgium.¹

The **primary objective** of this assessment is "to evaluate progress towards GRB programming outcomes and outputs at country level through a case study of *the Global GRB Programme: Phase II*".² This report also aims to support future GRB programming by consolidating and testing the theories of change that underpin UNIFEM's work in this thematic area to identify enabling and disabling factors that affect the implementation of GRB programmes and to inform UNIFEM's learning on effective strategies, models and practices in promoting gender accountability in budgetary policies and practices.³ The Morocco assessment took place at the end of Phase II of the Global GRB Programme, which ran from January 2005 to December 2008.

The evaluation criteria used for analysis of the field data were **relevance**, **effectiveness** and **sustainability**, with definitions drawn from the OECD DAC evaluation guidelines. Fieldwork was carried out from 12 December 2009

to 23 December 2009 in Rabat by Sylvia Bergh (international consultant) and Youssef Belal (national consultant).

The principal evaluation methodologies used were:

A desk review of relevant documents on GRB concepts and practice, contextual data for specific country programmes and programme documentation, where available.

Semi-structured interviews with key stakeholders identified by UNIFEM personnel in Morocco.

A focus group meeting attended by those who had participated in UNIFEM-supported GRB training during Phase II of the Global GRB Programme.

The two major limitations in the evaluation methodology were:

The lack of organized and comprehensive programme information held by the UNIFEM office, and

The lack of a systematic monitoring and evaluation framework and data for the programme.

As a result of these limitations, although it is possible to reconstruct the approaches taken over the life of the programme and to seek some evidence from interview data about the impact of these approaches, it has not been possible to provide robust evidence of the progress in the programme towards achieving outputs, outcomes or impact.

Context and description of the programme

Although the **Constitution** guarantees equality before the law, it does not enshrine the principle of equality between

¹ Separate reports were created Ecuador, Mozambique and Senegal, the other three countries where UNIFEM's Global GRB Programme concentrated its Phase II.

² Note: The *Global GRB Programme: Phase II* is the Belgium-funded "Strengthening Economic Governance: Applied Gender Analysis to Government Budgets" programme.

³ These objectives formed part of the objectives for the overall evaluation, as defined in the ToRs.

women and men in all spheres. Morocco ratified CEDAW on 21 June 1993, but it submitted three reservations that were only lifted recently. The new Family Code (Personal Status Code) came into force in February 2004, granting more rights to women during marriage and in case of divorce, but its legal enforcement is uneven. Starting in 2001, the Moroccan government launched a series of **public sector reforms, including results-based budgeting and management**. In the absence of a National Development Plan, **sectoral policy** guidelines come from two main sources: the royal speeches, which set out broad orientations and visions and the policy objectives and priorities of the incumbent government; and the **National Initiative for Human Development (INDH)**, which represents the broad framework for the national development strategy. In May 2006, the Secretary of State in charge of the Family, Children and the Disabled (SEFEPH), with the support of GTZ and others, launched the “**National Strategy for Equity and Equality** between Women and Men through the integration of a Gender Approach in Development Policy and Planning”.

An initial phase of the UNIFEM Programme (2001-2004) aimed to reinforce the capacity of high-level cadres of several ministries to progressively internalise the principles and practice of GRB. Phase II (2005-2008) of the programme **shifted emphasis** away from more general awareness-raising and making the GRB methodology appropriate for the Moroccan context towards focusing on the gender analysis of expenditures and outputs as well as outcomes and impacts. The Ministry of Finance was the lead partner, but there was a **shift within the ministry** from a sole focus on the Directorate of Budget (DB) to inclusion of the Directorate of Studies and Financial Forecasting (DPEF) and Directorate of Administrative and General Affairs (DAAG), with DPEF assuming overall leadership.

During Phase II, the Programme sought to achieve **three outcomes**:

1. National budget processes and policies reflect gender equality principles in Morocco;
2. Priorities of poor women reflected in sectoral budget allocations for national programmes addressing poverty; and
3. Knowledge and learning on GRB facilitates replication of good practices and exchange of lessons learned.

The implementation strategies in Phase II consisted of:

Capacity-building through providing training workshops for a number of different target groups, including latterly with civil society organizations (CSOs); and

Sectoral pilots with the Department of Vocational Training (DVT) in the Ministry of Employment (ME) and the Department of Literacy and Non-Formal Education (DLNFE) in the Ministry of National Education (MNE).

Main findings

The GRB Programme in Morocco has, to date, achieved a number of **significant results** that can be linked to outputs or outcomes in the log frame. Overall, the programme focused on changing major national processes of public finance management in a country where, until recently, the culture of evaluation of public programmes and policies was nonexistent. This naturally limited the achievement of short-term, concrete results. Key results were:

The yearly inclusion of a paragraph on gender issues in the **Budget Call Circular Letter**

Publication of yearly **Gender Reports** with an increasing number of contributing departments, and improved reflection on gender-sensitive indicators for evaluating public programmes and policies

Inputs to **sectoral pilots MTEFs and budgets**, with gender-sensitive indicators drafted

Real changes in budget allocations were identified for a few selected areas. These were the result of the GRB programme and other programmes focusing on gender equality.

In order to achieve these results, **UNIFEM successfully built relationships with key budget decision-makers** in the Ministry of Finance and made some headway in building relationships between NGOs and the Ministry. Building on this success will require:

A more strategic engagement with the budget planning, allocation and execution processes, as well as raising awareness about GRB concepts more broadly within public administration; and

A more strategic approach to engagement of NGOs and parliamentarians.

The programme trained a significant number of civil servants on GRB concepts, especially in programme evaluation and indicator development. However, effectiveness was limited by institutional and organizational constraints in public administration, which reduced the participants' ability to apply what they learned in their work. Awareness-raising with NGOs was very relevant, but there is a need now to focus more on the budget process than gender and GRB concepts.

The coverage of 14 programmes in GRB sectoral pilots is a significant achievement, although follow-up should focus on continued support from the Directorate of Budget in making corresponding changes in budget allocation. The effectiveness of this work could have been enhanced by including not only the development of gender-sensitive indicators, but also data collection and information systems and liaison with other donors working in the same pilot sectors. The lack of an overall advocacy strategy and disagreements between key stakeholders meant that opportunities to build on specific achievements were not fully exploited.

Main recommendations

- 1.** While the capacity-building approach adopted for Phase II was broadly relevant and effective, there is a shared need now to move beyond workshops for capacity-building towards more targeted technical support (especially by the Budget Directorate) and building peer learning networks across key sectors to achieve real changes in budget allocations.
- 2.** At the start of Phase III, it would be useful to explicitly address the Theory of Change that it is based on to ensure that it is shared and committed to by all relevant stakeholders, within the UNIFEM team at HQ and in the Morocco office, including accountability actors and other donors.
- 3.** Similarly, it is recommended to map all ongoing gender and budget reform programmes and identify strategic partnerships and cooperation opportunities to increase UNIFEM's leverage of limited resources and the impact of its GRB Programme.
- 4.** In order to capitalise on the success of the Morocco programme, it is important to finalise the learning mechanisms and knowledge management components as soon as possible and draw up a dissemination plan to share good practices and lessons learned systematically, both within Morocco and abroad. Partnerships with other relevant countries should be institutionalised to maximise gains.

1. Purpose of the evaluation

In order to assess the effectiveness and relevance of UNIFEM's work in key areas, UNIFEM undertakes a number of strategic corporate evaluations every year. Corporate evaluations are independent assessments that analyse UNIFEM's performance and contribution to the critical areas of gender equality and women's empowerment. They are considered strategic because they provide knowledge on policy issues, programmatic approaches or cooperation modalities.

The evaluation of UNIFEM's work on GRBs is a corporate evaluation, and it is undertaken as part of the annual evaluation plan of the Evaluation Unit in 2008. The justification for its selection as a corporate evaluation is based on the existing commitment of donors to fund the programme (the Belgium government), its relevance to the UNIFEM Strategic Plan (2008-2011), its potential for generating knowledge on the role of GRB for greater accountability to women and advancement of the gender equality agenda, the size of investment allocated to this area of work in the last years and its geographic coverage.

In particular, this evaluation is particularly important given that UNIFEM's Strategic Plan has placed a specific focus on **increasing the number of budget processes that fully incorporate gender equality**, defining it as one of the eight key outcomes to which the organization aims to contribute by advancing the goal of implementation of national commitments to gender equality and women's empowerment. It is therefore expected that this evaluation will bring significant evidence and understanding of the factors that enable or hinder successful implementation of GRB processes.

This evaluation is an independent external evaluation that has been undertaken by Social Development Direct. The evaluation has been designed to be both summative and formative. It seeks to be a forward-looking and learning exercise, rather than a pure assessment of GRB program-

ming in UNIFEM. The evaluation deploys a theory-driven approach and aims to assess critically what conditions and mechanisms enable or hinder UNIFEM's work in increasing gender equality in budget processes and practices, as well as evaluate UNIFEM's overall approach to GRB programming. The principal objective is to inform and support UNIFEM's strategy on gender-responsive budgeting.

The corporate evaluation has been conducted in three stages.

Stage 1 involved a preliminary rapid assessment of GRB initiatives to clarify the scope of the evaluation.

Stage 2 focuses on the *Global GRB Programme: Phase II* as a case study and assesses the programme's results at the country level. Country case studies included in this stage of the evaluation are Senegal, Morocco, Mozambique and Ecuador.

Stage 3, building on the findings of the first two stages, evaluates the overall appropriateness (effectiveness, relevance and sustainability) of UNIFEM's approach to GRB programming.

It is expected that the results of the evaluation will be used as significant inputs for:

UNIFEM's thematic strategy, reflection and learning about work on GRB programming;

The design and implementation of the third stage of the GRB Programme;

Improving the monitoring and evaluation systems of UNIFEM's current GRB Programmes and preparing the impact evaluation of the selected countries.

This report documents findings and recommendations from the country assessment in Morocco. It should be read in conjunction with the overall report for Stage 2 of the evaluation.

2. Evaluation objectives and scope

Evaluation objectives

The overall evaluation has the following objectives:

To assess UNIFEM's GRB thematic strategy and its technical and political effectiveness in promoting gender equality;

To support GRB programming by consolidating and testing the theories of change that underpin UNIFEM's work in this thematic area;

To identify enabling and disabling factors that affect the implementation of GRB Programmes;

To evaluate progress towards GRB programming outcomes and outputs at the country level through a case study of *the Global GRB Programme: Phase II*;

To inform UNIFEM's learning on effective strategies, models and practices in promoting gender accountability in budgetary policies and practices;

To support the selected GRB Programmes in their programming and evaluation by updating their theories of change, identifying indicators and providing monitoring tools.

The primary objective of the Morocco country assessment is to contribute to the case study evaluation of *the Global GRB Programme: Phase II*. The findings from this country evaluation of progress towards outcomes and outputs at the country level will be used, along with evidence from the three other country evaluations, to draw programme-level conclusions on the application of theories of change at country level, achievements, and enabling and disabling factors that have affected implementation, and lessons that can be drawn on effective strategies, models and practices. In Morocco, the *Global GRB Programme: Phase II* ran from January 2005 to December 2008.

The evaluation took a **theory-based approach** and focused on two key aspects of the underlying model of change in the programme:

Setting out the steps that constitute the main elements of the explicitly stated causal chain in the form of a logic model, linking inputs, activities, partners and short-term outputs to the expected outcomes of the programme in the medium-term and ultimately to the long-term impacts;

Seeking to understand the logic underpinning the programme, looking at the stated assumptions and particularly focusing, through the evaluation process, on the implicit assumptions that affect the different stages of programme development.

Evaluation criteria and evaluation questions

The evaluation criteria used for analysis of the field data were **relevance**, **effectiveness** and **sustainability**, with definitions drawn from the OECD DAC evaluation guidelines. Evaluation questions relating to the three criteria were drawn from the evaluation ToRs and developed further into the overall methodology for the evaluation.⁴ Definitions of the evaluation criteria and a summary of key questions related to each criterion are listed below.

Relevance: the extent to which the objectives of the development intervention are consistent with beneficiaries' requirements, country needs, global priorities and partner's and donor's policies.

⁴ See overall evaluation methodology and tools and guidance for country assessments 5 January 2009.

To what extent has the programme been successful in positioning the GRB work within broader national planning, budgeting and monitoring frameworks (PRSP, budget reform, public sector reform and decentralization)?

How was the situation and needs analysis undertaken for the GRB intervention?

How were women's priorities identified?

Effectiveness: the extent to which the development intervention's objectives were achieved, or are expected to be achieved, taking into account their relative importance.

Outcome 1

To what extent has the programme been successful in introducing changes in MOF budgeting processes to better respond to gender needs, e.g. budgeting process, guidelines and budgeting instruments, access of gender equality advocates to budget policy-making processes?

To what extent has the capacity of the Ministry of Finance to carry out GRB been enhanced by the programme?

To what extent has the programme strengthened the role of women's rights advocates in the budgeting process?

Outcome 2

What kinds of changes could be observed as a result of the piloting in terms of budgetary allocations for women's priorities?

Outcome 3

What form has knowledge development taken in the programme countries? What types of knowledge products have been produced?

Programme Strategies

How have the strategies of capacity-building, sector piloting, evidence-based advocacy and partnership contributed to change?

Programme Management

How effective has UNIFEM been in ensuring adequate human, financial and technical resources towards the programme?

Across the GRB Programme

What were the challenges/difficulties of the programme? How were these addressed?

How has the achievement of outcomes been influenced by the political, economic, social and institutional contexts?

What examples of "promising practices" have emerged in the GRB Programme?

What evidence exists (if any at this stage) that UNIFEM's GRB Programme is contributing to gender equality and making an impact on the advancement of human rights?

Sustainability: the continuation of benefits from a development intervention after major development assistance has been completed. The probability of continued long-term benefits. The resilience to risk of the net benefit flows over time.

What evidence is there that achievements will be sustained?

What specific activities do government, civil society organizations or others say they will continue regardless of whether UNIFEM support continues?

To what extent has the programme been successful in embedding the participation of civil society and women's organizations in the entire budgetary cycle?

To what extent has the programme been successful in making the linkages and agreements that would ensure the continuation of work on GRB?

What factors are/will be critical to sustainability?

The evaluation took a theory-based approach. This focused not only on results achieved or efforts made towards achieving the outputs and outcomes identified in the logical framework developed for the programme, but also on causal relations among resources, activities, outcomes and the context of intervention.

3. Evaluation methodology

The team carried out **desk reviews** of relevant documents on GRB concepts and practice as well as the context for the GRB Programme in Morocco. Additional documents were gathered and reviewed during fieldwork in Morocco.

The main outputs of the desk review consisted of the country contextual analysis and initial development of a logic model for each of the countries. The contextual analyses provided material to analyse the selection of the countries for Phase II of the programme and to begin the process of understanding the logic underpinning the implementation of interventions in each of the countries. Through the initial development of the logic models, it was found that they were not sufficiently differentiated to fully understand how they were applied in each of the country contexts. Therefore, the field visits focused in large part on developing the logic model and in seeking to better understand whether and how this model of change guided implementation and the monitoring of progress.

The principal tool used was **semi-structured interviews** with 22 key stakeholders (see Annex 3 for a list of interviews). Prior to in-country fieldwork (on 22 December), the international consultant discussed a list of key stakeholders to be interviewed with the GRB coordinator in UNIFEM's Morocco office. The UNIFEM office then provided the final list on 6 January, which enabled the national consultant to set up a schedule of interviews. All of these interviews took place face to face in Rabat, with both evaluators present. The initial interviews were booked with UNIFEM staff and Ministry of Finance staff directly involved in implementation of the GRB Programme. A brief follow-up meeting was set up with

UNIFEM staff to clarify programme details, and several interviewees submitted additional documents/reports for the evaluators' consideration.⁵ In total, the consultants met with 22 persons/teams and held a debriefing meeting with key UNIFEM and Ministry of Finance staff at the Ministry of Finance on 22 January 2009. All interviewees were provided with a summary of the technical proposal for the evaluation (drawn from the "Overall Evaluation Methodology and tools and guidance for country assessments" report and translated into French), written by the consultants.⁶ The objective of each meeting and the relevant topics were agreed between the two consultants. Appropriate prompt questions were identified from the full list of questions drafted during development of the overall guidance report. During interviews, each consultant took notes, which were later summarized in a standard format.

The second tool used by the evaluation team was a **focus group meeting** with 17 people who had participated in UNIFEM-supported GRB training during *Global GRB Programme: Phase II*. The objectives of the focus group were to widen the range of stakeholders consulted, to assess the effectiveness of training in which a range of stakeholders had participated and to elicit contributions to development of the overall theory of change.

Before and during the mission, the consultants obtained the list of workshop participants from UNIFEM staff and selected a representative sample from among them consisting of 34 persons. These individuals were chosen to ensure a diverse representation of trainings and partner institutions. The consultants contacted the individuals first by telephone, followed by formal invitations sent by

5 From among the numerous programme documents, the Final Phase II report finalised by the UNIFEM Morocco office in January 2009, and a draft report titled "Modélisation du processus de mise en place de la BSG au Maroc", commissioned in February 2008 as part of the Knowledge Management component of Phase II, were particularly useful.

6 Social Development Direct: Evaluation du programme UNIFEM portant sur la Budgétisation Sensible au Genre (BSG): Proposition technique (Version résumée), 6 janvier 2009.

the UNIFEM office. The focus group meeting was held in the second half of the mission (on 20 January 2009, from 2-5 pm); to allow for logistical arrangements of confirming participation and to ensure that some initial findings could be triangulated in the meeting. The 17 participants attending the focus group included representatives from three NGOs and five individuals who had already been interviewed earlier. This composition also provided a learning and networking opportunity to the participants themselves. The meeting was held at the UN's Information Centre in Rabat, and UNIFEM staff provided logistical support. In order to increase the reliability of the findings, the consultants prepared a short questionnaire for each participant, which was completed individually at the beginning of the focus group (see Annex 7). The participants then shared their written answers with the plenary, with the consultants facilitating the discussion. Fifteen of 17 participants submitted a completed questionnaire to the consultants, and the answers have been synthesised and analysed for this report (see Annex 8 for the raw data, translated into English).

Due to scheduling problems, it was not possible to meet with MPs, whose views would have been useful to collect in preparation for Phase III (they were not involved much in Phase II). However, the interviews and focus group questions ensured that sufficient information was collected from third parties about the past and future potential role of MPs in GRB. The consultants were also unable to meet with staff at the Ministry of Public Sector Modernization (MMSP), who would have been able to provide contextual information on the gender aspects of public sector reforms, notably in the area of human resources. This was mitigated by the close analysis of the Gender Report 2009 and especially the chapter on the MMSP.

The evaluation team sought evidence from both interviews and the focus group discussions to test the understanding of the theory of change for the programme and to explore the implicit assumptions that it contained. This involved

ensuring that information was gathered about how programme staff and partners had assessed the context in which the GRB Programme was planned to operate, the logical framework that specified intended results as well as inputs and activities to achieve those results and the long-term relationships with other actors working in parallel and complementary ways in order to achieve the desired change. The information gathered provides some evidence of the importance of the implicit assumptions in the programme, something that was not clear in the initial programme documentation.

The major problem with the evaluation methodology was the lack of a systematic monitoring and evaluation framework and data for the programme. As is discussed in detail below, the lack of organized programme information meant that the evaluation team had to rely on interviewees' recollections or reconstruct information from the limited documentation available. Without such information, it is not possible to provide detailed examples of lessons learned, something that is noted in the analysis. The lack of a monitoring and evaluation framework and of data to assess progress is a significant limitation on the evaluation. It is possible to reconstruct the approaches taken over the life of the programme, as is attempted below, and to seek some subjective evidence from interviewees' recollections about the impact of these approaches. It is, however, not possible to provide robust evidence of the progress in the programme towards achieving outputs, outcomes or impact.

Fieldwork was carried out from 12 January 2009 to 23 January 2009 in Rabat by Sylvia Bergh (international consultant) and Youssef Belal (national consultant).

4. Context of the programme

A brief summary is given here of the key features of the legal, policy and institutional context for advancing gender equality.⁷ The policy framework for national development and public sector reform informs GRB by establishing the framework for economic and social development priorities and the parameters within which budget processes can be expected to change. The gender policy context informs GRB with regard to the extent to which the potential for women's advancement and the principles of gender equality and women's empowerment are established. The institutional context informs GRB with regard to the degree of continuity in actors and structures that are key to advancing GRB objectives.

Although the **Constitution** guarantees equality before the law, it does not enshrine the principle of equality between women and men in all spheres. Morocco ratified CEDAW on 21 June 1993, but submitted three reservations that were only lifted recently. The new Family Code (Personal Status Code) came into force in February 2004, granting more rights to women during marriage and in case of divorce, but its legal enforcement is uneven. In terms of parliamentary effectiveness, the Moroccan Constitution sets out strict limits on Parliament's ability to amend the budget, and it cannot alter the overall envelope. The investment budget that is voted by Parliament covers only around a third of total public investments. Furthermore, Parliament has minimal oversight during the execution phase.

Starting in 2001, the Moroccan government launched a series of **public sector reforms, including results-based budgeting and management**, supported by the World Bank, EU, and AfDB-financed Public Administration Reform loans and grants. The pillars on which this new

budgetary system rest are the globalization of credits,⁸ contracting and partnerships. The rationale for the globalization of credits is to introduce more flexibility in the way budgets are prepared and presented so that what the spending is for (objectives) becomes a focus for budget preparation and presentation rather than purely how much is being spent and on what (means). Contracting arrangements between the central and line ministries and the provincial delegations of these ministries, as well as partnerships between the state and civil society organizations, are to be made around these policy objectives for the effective and efficient delivery of public services.

As a middle-income country, Morocco does not have a PRSP. The Organic Budget Law stipulates that the **Economic and Social Development Plan** is the framework to guide budget orientations. The Plan was previously related to the investment budget only, with its annual translation into budgets contingent on the macroeconomic and financial framework. The integration of gender issues and the use of gender analysis were very limited in the 2000 to 2004 plan. Since 2005, the **National Initiative for Human Development (INDH)** represents the broad framework for the national development strategy. Launched in May 2005 by the King of Morocco, the INDH is a national effort to alleviate poverty and achieve the MDGs. Activities are directed towards the local level, targeting priority communities with high levels of poverty, especially in rural areas. Areas of work include basic infrastructure and service delivery, literacy programmes and income-generating activities.

In the absence of a National Development Plan, **sectoral policy** guidelines come from two main sources. First,

7 A more comprehensive description of the general context in Morocco was produced in Stage 1 of the evaluation process, and a report is available (5 January 2009).

8 The globalization of credits makes it possible to shift allocations between lines of the same budget paragraph without needing the approval of the Minister of Finance, by making the link between the allocated funds and the expected results as well as the relevant performance indicator (GRB Handbook 2006, p. 109).

there are the royal speeches, which set out broad orientations and visions and the policy objectives and priorities of the incumbent government. Second, while the INDH is not an overarching policy framework on which to base sectoral policies and strategies, all major donors refer to it in aligning their interventions to national priorities.

In May 2006, the Secretary of State in charge of the Family, Children and the Disabled (SEFEPH), with the support of GTZ and others, launched the “**National Strategy for Equity and Equality** between Women and Men through the integration of a Gender Approach in Development Policy and Planning”.⁹ The **national strategy to eliminate violence against women** was developed in partnership

with UNFPA, UNDP and UNIFEM in 2002, but there is not yet any specific legislation on violence against women and girls, including domestic violence and violence against domestic workers. UNIFEM is the lead agency for the “**Multisectoral Programme to combat gender-based violence** through the empowerment of women and girls in Morocco”. UNIFEM promotes the coordination and synchronization of preventive and curative approaches supported by various donors for combating GBV, across sectors and at national, regional and local levels. During *GRB Programme: Phase II* (in 2007), the national women’s machinery (SEFEPH) was integrated as a ministerial department into the new Ministry for Social Development, the Family and Solidarity.

⁹ The strategy’s implementation status was being evaluated at the time of this GRB evaluation.

5. Description of the GRB programme

The GRB Programme in Morocco was **based on a 2002 World Bank-supported study on the feasibility of gender- (and child-) responsive budgeting**, for which UNIFEM had provided technical support through the preparation of the ToR and identified the international consultant. The study concluded that a gender-responsive budgeting initiative within the context of the ongoing budget reform process would reinforce the measures already taken to reduce disparities by bringing a closer fit between the national policies for the advancement of women and child development and the budgetary expenditures required to achieve these objectives.¹⁰ Among the study's main recommendations was that GRB should be integrated in the recently launched budget reform, which included a focus on Results-Based Management (RBM), that the Ministry of Finance should take a leadership role and capacity-building should focus on three main areas: editing an annual Gender Report accompanying the Finance Bill, including gender in public policy evaluations and supporting sectoral departments to integrate gender in their results-based budget planning. UNIFEM, informed by this study, thus identified the shift towards results-based budgeting as an opportunity and a strategic entry point for GRB in Morocco.

Phase I (2001-2004) aimed to reinforce the capacity of high-level cadres of several ministries to progressively internalise the principles and practice of GRB. A key output was the participatory design of a GRB manual, developed by a team of high-level cadres in the Directorate of Budget. A qualitative study was also undertaken with a sample of parliamentarians and NGOs on the existing state of knowledge of and attitudes towards results-based budgeting and GRB, and sensitization materials were developed on the basis of the study's results.

During Phase II (2005-2008), the programme **shifted emphasis** away from more general awareness-raising and making the GRB methodology appropriate for the Moroccan context towards focusing on the gender analysis of expenditures and outputs as well as outcomes and impacts. The Ministry of Finance remained the lead partner, but there was a **shift within the ministry** from a sole focus on the Directorate of Budget (DB) to inclusion of the Directorate of Studies and Financial Forecasting (DPEF) and Directorate of Administrative and General Affairs (DAAG), with DPEF assuming overall leadership.

A country level programme log frame was included in the main programme document finalised in 2005.¹¹ The final progress report for 2008 includes some outputs that differ from the 2005 log frame (see Annex 5 for a full list of outputs). Beyond their mention in annual reports, the evaluation team was not able to find documentary evidence on the underlying reasons for these changes and the negotiation process with HQ. Outputs identified in the programme document of 2005 and the differences with the 2008 progress report are summarized below for each outcome.

For **Outcome 1, "National budget processes and policies reflect gender equality principles in Morocco"**, outputs in 2005 focused on the Economic and Financial Report (EFR) as an instrument for policy evaluation incorporating a gender perspective.¹² By 2008, a more

¹⁰ UNIFEM (2005b): Global UNIFEM Programme in Gender Responsive Budgeting Phase II: Moroccan Component, Implemented by the Morocco Ministry of Finance in partnership with UNIFEM, p. 3.

¹¹ See UNIFEM (2005b): Global UNIFEM Programme in Gender- Responsive Budgeting Phase II: Moroccan Component, Implemented by the Morocco Ministry of Finance in partnership with UNIFEM

¹² A Gender Report was initially annexed to the Economic and Financial Report in 2005 and 2006, but in 2007 it became a freestanding document accompanying the draft Finance Bill for 2008 presented to Parliament. English translations of the 2006-2008 Gender Reports were used, and the French version for 2009 (the English http://www.finances.gov.ma/genre/html/rapports_genre.htm). The full references are: Ministry of Finance and Privatization, Direction of Studies and Financial Preview: Gender Report Year 2006, translated by Dr. Ibrahim Moussabbir; Kingdom of Morocco, Ministry of Finance and Privatization, Directorate of Studies and Financial Forecasts, Gender Report 2007, Attached to the Finance Bill; Kingdom of Morocco, Ministry of Economy and Finance: Finance Bill for the 2008 Fiscal Year: Gender Report; Ministère de l'Economie et des Finances: Projet de Loi de Finances pour l'Année Budgétaire 2009: Rapport sur le budget genre

ambitious output was formulated, which included the aim to foster a culture of accountability. Other (unchanged) outputs referred to the setting up of mechanisms in the budgetary process to prioritise gender-responsive policies and programmes at the national, regional and sub-regional levels; and the understanding by parliamentarians, national women's machinery, women NGOs, media and other gender equality experts of GRB and their use of the EFR/Gender Report in policy advocacy and budget monitoring. A further output includes establishing linkages between engendered MDGs and quantified objectives and targets of sectoral ministries.

For **Outcome 2, "Priorities of poor women reflected in sectoral budget allocations for national programmes addressing poverty"**¹³, the focus in the Morocco programme was on the local, rather than the national, level. Outputs in 2005 referred to refined poverty maps for pilot zones and the development of Community Based Monitoring Systems (CBMS) in at least three pilot zones at the municipal ("*commune*") level. In the 2008 Progress Report, this was reformulated to "poverty mapping" and scaled down to two pilot zones. Two further (unchanged) outputs under this outcome are at least four gender-responsive sectoral budgets and the "participatory" evaluation of public expenditures at the local level (in at least three pilot zones) to arrive at gender-responsive and pro-poor programme budgets, with partnerships being created between ministries and NGOs.¹⁴

For Outcome 3, "Knowledge and learning on gender-responsive budgeting facilitates replication of good practices and exchange of lessons learned"¹⁵, in 2008

Output 1 does not explicitly mention the partners that are to be involved in the national information and exchange network, and the creation of a knowledge network at regional and interregional level on GRB was dropped (though the networks mentioned under the new Output 1 include national and international knowledge-sharing networks). Mechanisms for ongoing learning at the Ministry of Finance and sectoral ministries, as well as knowledge management and capitalization based on the sector pilots were maintained as further outputs.

The implementation strategy throughout Phase II concentrated on providing training **workshops** for a number of **different target groups**, including planning and budget officials and gender focal points, from several sector ministries and from the various departments in the finance ministry. Workshops with civil society organizations (CSOs) and NGOs were only held towards the end of the programme (in 2008), and no formal activities were organized for parliamentarians and provincial departments of ministries or local government.

The sectoral pilots were conducted with the Department of Vocational Training (DVT) in the Ministry of Employment (ME) and the Department of Literacy and Non-Formal Education (DLNFE) in the Ministry of Education, with three additional departments joining these in 2008 (Department of Employment in the Ministry of Employment, Department of Health and Department of Economy and Finance).

The intended ultimate **beneficiaries** of the programme were poor women, whose priorities would be better addressed in budget allocations and through gender-sensitive national policy and budgeting processes.

13 This refers to the outcome mentioned in the overall programme log frame. In the Morocco country log frame, Outcome 2 is called "Priorities of poor women are reflected in pro-poor budgeting".

14 In Morocco, GRB work at the local level took place under a separate UNIFEM project (Phase I: 2004-2007, Phase II: 2007-2009). See background document: Association Démocratique des Femmes du Maroc (ADFM): Budget local et genre au Maroc, Casablanca 2005; and UNIFEM (undated but probably 2006): Project Proposal: Gender Equality in Local Level Planning and Budgeting in Morocco (2007-2008).

15 In the Morocco country log frame, Outcome 3 is called "Knowledge and learning on GRB facilitates the dissemination of good practices and lessons learned as well as dissemination of GRB initiatives".

The immediate beneficiaries of the programme were the staff of the Ministry of Finance, the planning and finance staff of sector ministries and representatives from civil society organizations deemed responsible for ensuring accountability to achieving gender equality. There were no other significant stakeholders apart from the consultants hired either for giving trainings or developing studies and reports.

The Global Programme enabled UNIFEM to start GRB work and formed the basis from which further GRB work has developed (in particular at the local level¹⁶). From 2005 to 2008, the programme had an annual **income** between \$150,000 and \$200,000, and in Phase II it had funding to contract a full-time coordinator. Basic calculations based on 2005, 2006 and 2007 income and expenditure figure reveal a net surplus of almost \$100,000 (\$92,678), i.e. 19 per cent of total income for these years. This surplus is mainly due to salary savings following the departure of the international programme manager in 2007.¹⁷

The **programme management** arrangements were that funding was sourced and reported on from UNIFEM's New York headquarters, with national-level programme activities falling under the general responsibility of the Regional Programme Director for North Africa based in the Rabat office. Throughout both Phases I and II, UNIFEM implemented the bulk of its capacity-building activities by contracting the same **international consultant**, Nalini Burn. Other technical support included Jacques Charmes and Salama Saidi for training in poverty statistics, Abessalam Fazouane and Nezha Lamrani for the MDG costing study and Abdessalam Fazouane and Abdelkhlek Touhami on the CBMS study and training.

5.1 The GRB Programme's theory of change

In **Phase II, a general theory of change** was predicated on the view that, while a general awareness about GRB had been developed with lessons from the experiences of 20 countries available, GRB work was not yet aligned to the national budget cycle and mainstream budget processes. The purpose of the second phase was, therefore, to transform the execution of the budget to reflect responsiveness of budget policies and processes to principles of gender equality and thereby achieve concrete changes in resource allocations. It was set out that the long-term impact of the programme would be to demonstrate the impact these transformative actions have in relation to increasing access of poor women to services and resources and bridging the gender gap in line with the MDGs targets to be achieved by the year 2015.

In order to achieve the longer-term impact and the purpose, a relatively complex programme approach was proposed in the logical framework, with three components or outcomes and seven outputs contributing to these outcomes (see Diagram 5.1 below).

¹⁶ In Morocco, GRB work at the local level took place under a separate UNIFEM project (Phase I: 2004-2007, Phase II: 2007-2009). See background document: Association Démocratique des Femmes du Maroc (ADFM): Budget local et genre au Maroc, Casablanca 2005; and UNIFEM (undated but probably 2006): Project Proposal: Gender Equality in Local Level Planning and Budgeting in Morocco (2007-2008).

¹⁷ This analysis is incomplete as 2008 budget figures were not available from UNIFEM.

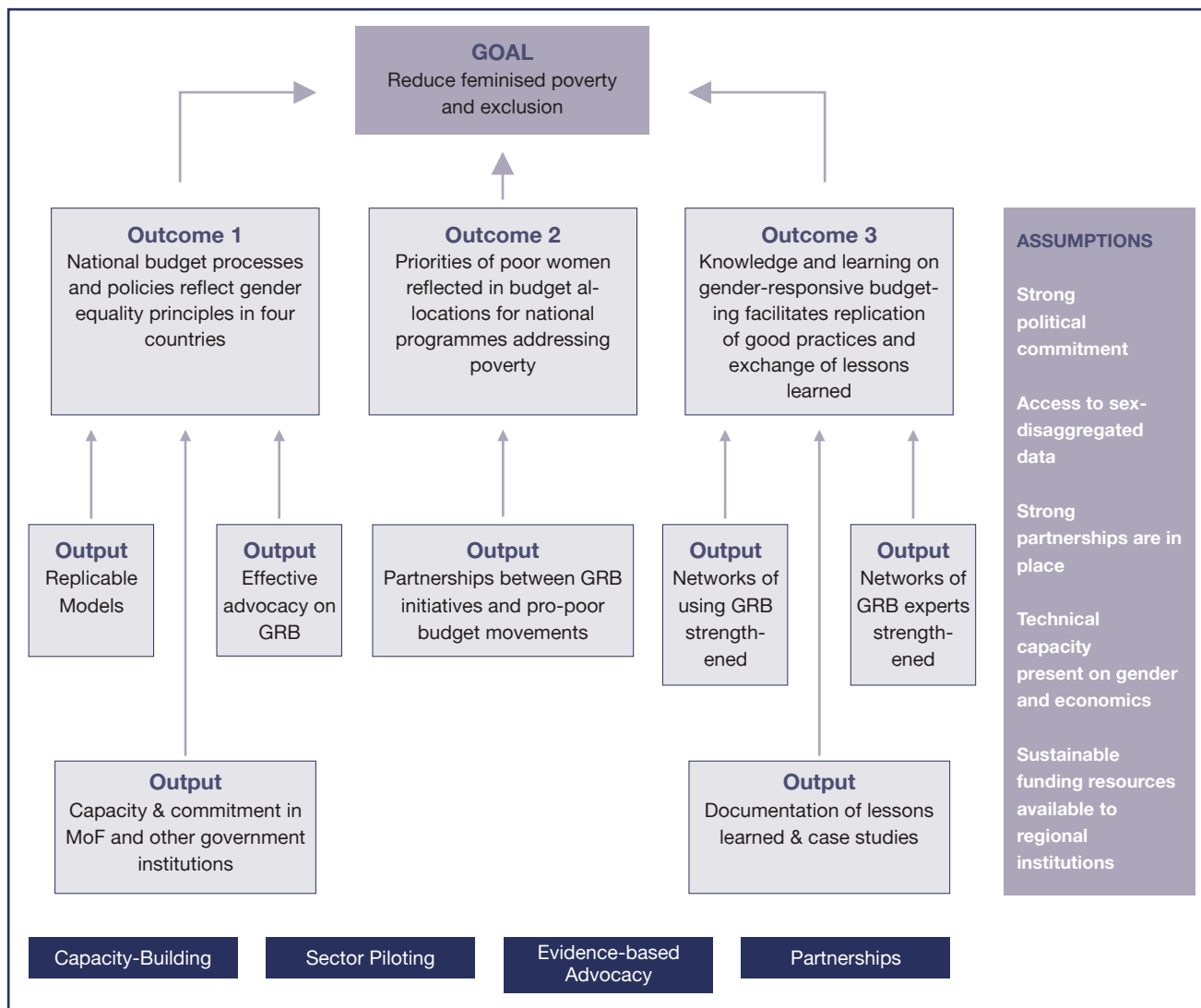


Diagram 5.1 - Model of GRB Programme Implementation

The diagram above sets out the steps in the causal chain, highlighting the **expected outcomes** of the combination of strategies and activities in the programme at each stage of the process. Thus, in:

The short-term, through the programme outputs, GRB work would become aligned to the national budget cycle, changes to national budget processes would be introduced, budgeting tracking mechanisms would be improved and documented and linkages between gender advocates and budget decision makers would be strengthened.

The medium-term, through the programme outcomes, policy and budget processes, would become more gender aware, budget allocations would reflect the priorities of poor and excluded women and good practices and lessons learned would be replicated through networks and knowledge sharing.

The long-term, the programme as a whole would contribute to the reduction of feminised poverty and exclusion.

The diagram also sets out the stated assumptions of the programme, which are relatively clear and relate primarily to the outcomes. However, these stated assumptions do not seem to have been developed or explored further

during programme implementation. As will be discussed below, three of these assumptions stand out as being constraints to programme implementation: the availability of sex-disaggregated data, the existence of strong partnerships and the presence of technical capacity on gender and economics.

In Morocco, throughout Phase II, the programme logic was that, in the context of a lack of awareness about GRB, capacity-building, in the form of training workshops for a wide pool of government staff (and, to a lesser extent, civil society actors), would create technical capacity and acceptance of the importance of recognising men and women's different needs and priorities. This technical capacity would then be further developed by "learning by doing" and applying it in the preparation and analysis of sectoral budgets. Learning support would come from the Budget Directorate in the Ministry of Finance to the sectoral pilot ministerial departments in order to "cross the threshold of awareness-raising, to translate willing-to into knowing-how".¹⁸ As a result, the government budget would become more gender-responsive.

The theory of change as reflected in the 2005 country log frame also identified the local or decentralised levels as important fields of application. Based on the rationale that participatory planning would result in more equitable budget allocations, UNIFEM also planned to engage with local-level government planning and budgeting through the CBMS and (participatory) evaluation of public expenditures. The theory of change thus held that change would have to come both from lower strata of government as well as from the higher levels, in the Ministry of Finance in particular.

While the emphasis was clearly on establishing gender in the government's planning, budgeting and oversight processes, the theory of change also gave some attention to the "demand side" of increased government accountability with regard to gender equality, through workshops for national civil society organizations (held in July and September 2008) and informal contacts with parliamentarians. Both sets of actors, it was assumed, would use the Gender Report to demand increased gender equity of the government's budget.

¹⁸ UNIFEM (2005b): Global UNIFEM Programme in Gender Responsive Budgeting Phase II: Moroccan Component, Implemented by the Morocco Ministry of Finance in partnership with UNIFEM, p. 3.

6. Programme results

This section reviews the results achieved by the programme and assesses them in terms of the evaluation criteria of Relevance, Effectiveness and Sustainability outlined in section 2.

6.1 Relevance

The extent to which the objectives of the development intervention are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donors' policies.

Here, relevance is reviewed in terms of the extent to which the UNIFEM team was able to identify appropriate strategic entry points and partnerships for promoting GRB, the methods they used for identification and analysis of those entry points and the challenges they faced in relation to the specific context for GRB. UNIFEM faced a series of challenges in establishing relevance, notably the lack of national data and statistics, complex and changing institutional relations and remits in relation to budgeting and planning and lack of clear documentation of different actors' programmes and practices.

Since its launch, the UNIFEM GRB programme in Morocco has focused on **budget reform**, with its main components being globalization of credits, contractualization between central and provincial level public administration and increased partnerships between state and non-state actors, such as NGOs. This required the introduction of results-based budgeting and management and a Medium-term Expenditure Framework (MTEF) for the budget.¹⁹ As the 2002 World Bank study concluded, the **results-based**

budgeting framework was a relevant focus for efforts directed at improving the gender equality focus of national budgeting processes, providing important opportunities for engagement and a focus on budget outcomes rather than inputs/activities.²⁰ Given this focus, the Ministry of Finance piloting this reform was the best choice of anchor for UNIFEM's GRB work, from the start of Phase I and throughout Phase II.

However, the **institutional changes** required to move fully to a results-based budgeting system will not be in place before 2009 at the earliest, given the need to first develop sectoral strategies and MTEFs. Moreover, the legal framework that would impose gender as a mandatory element of government budget proposals (the reform of the Organic Finance Law) is still under development, and there is a lack of capacity to effectively implement the budget reform regardless of whether it includes gender. However, the evaluation team found significant variation between ministerial departments in terms of when they adopted the budget reform, ranging from 2002 to 2008 (see Annex 9).

UNIFEM was acutely aware of the constraints imposed by this time horizon.²¹ As the UNIFEM regional director put it, "*the GRB programme is held hostage by the budget reform*". However, UNIFEM could have done more to anticipate timing implications of aligning the Programme to the budget reforms, for example, by changing its log frame output to exclusively focus on central government level rather than regional and provincial levels, which the budget reform would reach even later. In terms of choosing the ministerial departments for the GRB sectoral pilots, according to the UNIFEM Country Office, the

19 See Burn (2008) for an excellent summary of the budget reform components and process in Morocco.

20 Despite contacting the World Bank country office and headquarters, it was not possible to obtain the original document.

21 See, for example, UNIFEM's MTR 2006.

Ministry of Finance made a conscious choice. Although the two pilots chosen in 2007 had only recently or not yet formally adopted the reform, it was thought that working with them would mean that gender would not be an “add-on” later on, but that it would be integrated from the very beginning. However, as will be seen later, this strategy carried the risk of demanding too many institutional and operational changes from the staff in the ministries at the same time.

Lack of national statistics was a further challenge to GRB, making analysis of key gender issues difficult, and work undertaken in Phase II made important contributions to remedy the situation. UNIFEM commissioned **three studies** titled “MDG costing from a gender perspective”, “A comprehensive analysis of gender-sensitive data in Morocco” and “Community-Based Monitoring System” (CBMS), respectively.

The **MDG costing study**²² presents cost estimate projection models for the implementation of the MDGs in Morocco based on the adaptation and compilation of methodologies available at the international level. The study also highlights the limitations of the existing data-collection and information systems in monitoring the government’s efforts to incorporate women’s priorities in development policies. Although the study was completed by April 2006 and copy-edited by early 2008, it is still awaiting publication by the Directorate of Administrative and General Affairs at the Ministry of Economy and Finance. Hence, while this is an important contribution to GRB, the study has not had much impact beyond the individuals who have participated in the workshop in 2005 due to the delay in its publication. The 2005 and 2007

MDG National Reports were prepared from a gender perspective, and both established linkages between the MDGs and GRB.

The study titled “**A comprehensive analysis of gender-sensitive data in Morocco**”²³ was completed by the DB and DEPF in 2007. This study aimed to provide relevant data for gender-responsive thematic and sectoral analysis to feed into the Gender Reports and other GRB work, including the CBMS. The evaluation team found that while the study usefully presents a collection of previously dispersed data on gender disparities, it does not fulfil its second stated objective, namely, highlighting the gaps in the availability of gender statistics and data and giving concrete recommendations on how they could or should be addressed (see also 2009 Gender Report, p. 4). The study was used during the workshops organized under the GRB Programme, but it has not been widely disseminated otherwise.

The final study, **CBMS**, launched in 2006, aims to foster a better understanding of the local development needs of women and men in target areas and to evaluate the impact of public policies and services at the local level. The pilot study conducted in Morocco led to the selection of two pilot municipalities for the implementation of this system: Bouaboud (rural municipality) and Essaouira (urban municipality). A first phase of the survey was conducted in March-April 2007, the results of which were shared at the level of the two municipalities in December 2007. The second phase took place in 2008. The CBMS was not yet finalised at the time of evaluation.²⁴

22 DEPF and UNIFEM: Essai d'estimation des coûts de mise en oeuvre des Objectifs du Millénaire pour le Développement 'gendérisés' au Maroc, Décembre 2007 (copy-edited draft/print proofs).

23 DEPF and UNIFEM: Examen exhaustif des statistiques sensibles au genre au Maroc, 2007.

24 Ministère de l'Economie et des Finances, Direction des Etudes et des Prévisions Financières and UNIFEM: Dispositif de Suivi Communautaire (Community Based Monitoring System): CBMS-Maroc, Rapport de résultats de l'enquête communale, Premier Passage: Mars-Avril 2007, Municipalité d'Essaouira, Province d'Essaouira AND Commune Rurale de Bouaboud, Province de Chichaoua, both dated 30 Novembre 2007.

While all three studies have produced relevant information, **UNIFEM could have used them to effectively inform its sectoral entry points** and strategic planning with regard to the Phase II GRB work. Involving the High Commission for Planning more in the production of these studies (not only in the MDG costing workshop) may also have helped to increase their relevance and impact.

The most important **change in the external environment** at the start of Phase II was the National Human Development Initiative (INDH), launched by the King on 18 May 2005. This initiative aims to reduce poverty, vulnerability and social exclusion through targeted initiatives supporting income-generating activities, capacity-building activities and activities to improve access to services and basic infrastructure (education, health, roads, water and sanitation, habitat, cultural and sport infrastructure etc.). This major initiative was noted by UNIFEM in the Third progress report (p. 17), but it is only recently that actual linkages are being made with the GRB Programme (through the CBMS – see next section).

The relevance of the GRB Programme was also affected by **changes in the women's machinery**: the State Secretariat for the Family, Children and the Handicapped (SEFEPH) became a department in the new “Ministry for Social Development, the Family and Solidarity” in 2007. The institutional transition meant that the women's machinery was largely unable to participate effectively in the GRB Programme and the steering committee.²⁵

The UNIFEM Final Report highlights all relevant changes in the institutional, political, legal and economic contexts that occurred during Phase II. However, it could have gone further in systematically assessing existing/potential/missed linkages with regard to the GRB Programme. An example is the **National Strategy for Gender Equity and**

Equality that aims to mainstream gender concerns in development policies and programmes. While the 2006 strategy document²⁶ does not mention GRB, this may be due to UNIFEM's primary focus on the Ministry of Finance for GRB-related work. In the future, the revision of the National Gender Strategy may constitute a further entry point for UNIFEM to support the women's machinery in mainstreaming gender throughout the government.

As UNIFEM chairs the UN's systems gender thematic group in Morocco, it is generally aware of other UN agencies' work on gender.²⁷ However, given the multiplicity of actors involved in gender work, a comprehensive (and continuously updated) **mapping of gender programmes by other donors** may have helped to identify further entry points and opportunities for cooperation.²⁸ These include the work by the GTZ to mainstream gender and the “Fonds d'Appui à l'égalité entre les sexes” (FAES), funded by Canadian CIDA in the education sector (see next section). The latter programme is currently developing a handbook for developing gender-sensitive performance indicators adapted to the education sector. A further entry point in the future may be to link GRB with the next round of gender audits, the first round of which included three departments in 2006 (SEFEPH, SEJ and HCP; with UNFPA support).²⁹ Similarly, the 2009 Gender Report (p. 51) mentions a handbook and training on gender mainstreaming and RBM realised by **UNDP** (and the Ministry of Foreign Affairs) in 2006 and 2007, respectively. Some of these other donors arguably built on UNIFEM's GRB work in their more recent programmes (although the evaluators did not find hard evidence for direct links), but the general

25 The cooperation committee on gender (*Comité de coopération Genre*) that was established by SEFEPH at the end of 2006 to ensure a better coordination of activities undertaken by international partners involved in implementing the National Gender Equality Strategy only met a few times and has been inactive for some time (Interview Respondent).

26 Secrétariat d'Etat chargé de la Famille, de l'Enfance et des Personnes Handicapées: Stratégie nationale pour l'équité et l'égalité entre les sexes par l'intégration de l'approche genre dans les politiques et les programmes de développement.

27 But note that later programme documents do not refer to the UNDAF (United Nations Development Assistance Framework) for 2007-2011, even though it includes one national target related to women's and girl's rights (see GR09, p. 50).

28 There were 87 donor projects on gender implemented between 2003 and 2007, according to “Modélisation du processus de mise en place de la BSG au Maroc”, undated, p. 39.

29 Secrétariat d'Etat chargé de la Famille, de l'Enfance et des Personnes Handicapées: Analyse/Audit Genre “Outil pour une auto-évaluation et un outil de planification”, Rapport de synthèse, Juin 2006.

context of a lack of effective aid harmonization and coordination, as well as differing timespans of programmes mean that as a relatively small donor, UNIFEM faces the continuous challenge of maximising synergies with other gender programmes (see section 7.4. for recent positive developments in this regard).

In the area of **budget reform**, UNIFEM could have made more use of potential linkages with key donor support programmes: the **World Bank** has supported the budget reform since the beginning with a Public Administration Reform Loan (the fourth of which is being prepared) and includes technical assistance on RBM methodology and handbooks, work on performance indicators etc., but these do not include the gender dimension. The GRB Phase II programme document (p. 4) identified the World Bank as a potential key partner and even stated that “The precise calendar of activities will be drawn up in coordination with the programmes under way with the support of the World Bank” (p. 12). According to the Country Office, it made several attempts to involve the World Bank, but the latter was reticent to get involved. The economist at the World Bank office stated that he was aware of the need to explicitly include gender in the budget reform implementation, but he suggested that the World Bank would need a clear request from the government to do so.

The World Bank (at least its staff based at HQ) recently showed renewed interest in GRB by organizing a GRB workshop in Rabat in October 2008 at the invitation of the Ministry of Finance (DEPF).³⁰ Attended by UNIFEM staff, this event provided a further opportunity to compare GRB Programme results in Morocco with the results in other countries, and this was highly appreciated by the people interviewed for this evaluation. Although UNIFEM is planning its own event to disseminate learning from its GRB Phase II work, it may have been useful for the GRB programme’s visibility and relevance to include UNIFEM as an official organizer.

³⁰ Telephone conversation with, World Bank Social Development Advisor (in PREM) and coordinator of the GRB workshop on 20 February 2009.

Key findings

UNIFEM’s focus on the budget reform programme was highly relevant. However, its choice of sectoral pilots that were new to the budget reform may have overestimated the capacity of staff to implement multiple aspects of the reform at the same time.

In the context of a shortage of national statistics, support for the studies on MDG costing and gender-sensitive data as well as the CBMS was necessary and well chosen. However, their limited dissemination to date (due to the long validation process required by the Ministry of Finance) has reduced their usefulness as a strategic planning tool for GRB programming for UNIFEM and its partners.

A comprehensive (and continuously updated) **mapping of all gender programmes (current and in the pipeline)** could have helped to anticipate opportunities for joint action with other donors to overcome aid harmonization and coordination problems and to better leverage UNIFEM’s limited resources.

Nonetheless, linkages are now being made to key processes such as the INDH (through the CBMS).

6.2 Effectiveness

The extent to which the development intervention’s objectives were achieved, or are expected to be achieved, taking into account their relative importance.

Effectiveness is reviewed in terms of the results achieved in relation to the outputs and outcomes outlined in section 5. This section looks at the challenges the team faced in achieving those results and the ways in which the team responded to these challenges. The section is organized around the key log frame outcomes and outputs. Difficulties in applying these criteria include separating the impact of the GRB Programme on budget processes and allocations from the effect of other donor programmes addressing gender equality.

Changes in national budget and policy processes³¹

Most of UNIFEM's efforts during Phase II centred on **developing the skills within the government to produce the annual Gender Reports**. These reports present and evaluate the state of implementation and impact of public policies on gender equality and measure the gaps and challenges to achieve gender equality. Each chapter is department or department/ministry specific. The report is meant to be both a learning and advocacy tool to stimulate and enrich the debate around public policies and their evaluation. **The number of participating and contributing ministries and departments** has increased dramatically from 4 in 2005 to 11 in 2006, to 17 in 2007 and to 21 in 2008. Annexed to the EFR in 2005 and 2006, in 2007, **the Gender Report became a separate budget information document** and integrated a gender analysis of performance indicators. A standard format (developed by DEPF) was adopted to guide the report preparation process. The High Commission of Planning (HCP) does not produce a sectoral chapter for the report but it participates each year in the methodology workshops and contributes data.

Since the start of Phase II, the Directorate for Studies and Financial Forecasting (DEPF), which is also in charge of the preparation of the Economic and Financial Report (EFR), has coordinated the preparation of the Gender Report in collaboration with the Directorate of the Budget and the sectoral departments, with technical assistance from UNIFEM. The report preparation process is launched through a methodology workshop organized in the spring of each year. A gender team was created by the DEPF, composed of senior officials in charge of sectoral policies, which participated in the workshops on gender-responsive evaluation and planning to support the Gender Report. This workshop is followed up with technical support during the report drafting phase. The final report is subsequently presented to Parliament in October.

The progressive integration of new sectors in the Gender Report has broadened the base for monitoring progress made in the field of GRB. There are also **promising signs of an intersectoral approach** highlighting the multidimensional aspects of gender priorities and interventions. Comparing the Gender Report 2009 with the three previous editions, the evaluation team found **evidence of definite qualitative progress**, particularly as most departments list the MDGs and targets they seek to contribute to, as well as relevant CEDAW articles.³² In particular, the various departments reflect on the situation of its budget nomenclature (classification) in terms of the gender responsiveness in the investment and operating budgets and the various sectoral programmes. These improvements are mainly the result of the **strong leadership and commitment of the gender team in the DEPF**, aided by UNIFEM's technical assistance support and capacity-building.

However, the evaluation team found that there is a **high degree of variation** in the quality of reporting and analysis among the different departments: in some sections (e.g. Water, Agriculture, Energy, Health), the same information is essentially copied and pasted from one year to the next (due to the lack of updated, sex-disaggregated data and/or lack of capacity, commitment and perceived usefulness of the report – see below), and reflection is limited to hypothetical benefits of GRB derived from the literature (e.g. the impact of electrification of rural households on women's time use), and not on actual, documented gender impacts. Others (notably Justice, Ministry of Social Development, Foreign Trade and others) include updated information and illustrate relevant theoretical literature with country, programme and project data.

The extent of gender analysis also varies considerably.

For example, certain departments seek to interpret the underlying causes of gender discrimination that emerge

31 This section reports results and efforts in relation to Outcome 1, Output 1, "Articulated approaches that demonstrate how to transform budget processes to foster gender-responsive programmes and policies at the national level in four countries". For country-specific outputs contributing to this outcome, see Annex 5.

32 The INDH was included in the Gender Report 2008 in a separate section, "Gender Mainstreaming in the INDH Programmes", but this section disappeared in the 2009 Gender Report for unknown reasons.

from the data presented, but most do not go beyond presenting the raw data. For example, the Voluntary Leave programme in the public sector shows a much higher refusal rate for applications submitted by women (32%) than men (18%), but there is no analysis for the reasons for this (p. 40 in the 2008 Gender Report). The **same variation in capacity for gender analysis** and evaluation was evident during the interviews with key stakeholders from various ministries (see below). Consistency across sectors could be improved by providing more targeted TA.

The 2009 Gender Report makes a laudable attempt at linking the evaluation of public policies from a gender perspective with an evaluation of sectoral budgeting policies based on the instruments of the budget reform, notably gender-sensitive and sex-disaggregated indicators. The DEPF in fact requires each contributing department to include a table that sets out a typology of indicators for both the operational and investment budgets, with a column mentioning how specific indicators could become more gender-responsive. The text also includes information on the number of indicators and whether they are gender-sensitive or not (in a much more systematic manner than in the 2008 Gender Report). However, although almost all the departments show some evidence of serious reflection on this issue, almost none of them specifies what concrete actions it plans to undertake to actually implement these proposed improvements, nor according to what timetable. It seems that apart from staff involved in the sectoral pilots and a few other departments with high-level commitment, there is a **lack of commitment on the part of the real decision makers** in the Ministerial Departments, who in most cases do not seem to have been closely associated in the writing of the Gender Report (mostly done by the gender units or gender focal points and DEPF staff). A legal framework that explicitly includes **gender as a mandatory aspect of the budget reform**, and corresponding operational guidelines for government staff linked to incentives and sanctions, would help to improve this situation.

Capacity and commitment in the Ministry of Finance³³

In 2006, the Prime Minister issued a **Call Circular** (*lettre de cadrage*, dated 27 July 2006) related to the preparation of the 2007 Finance Bill. This circular made **reference for the first time to mainstreaming gender concerns** in the preparation process of the government budget. Since then, this call has been renewed every year. It is worded as a recommendation, rather than an obligation, to “consider gender in the globalization of appropriations and results-focused management aimed at upgrading budget preparation and implementation methods” (GR07, p. 8).³⁴

In 2007, a Prime Minister’s Circular called for the **gender mainstreaming of the government’s development policies and programmes** through the implementation of the National Gender Equality and Equity Strategy by all governmental departments. These Circulars should be seen as a result of (personal) lobbying of the Finance Minister by GRB advocates in the Ministry of Finance (DB and DEPF) and as a significant achievement.

A further achievement is the GRB programme’s **high visibility at the international level** and the excellent working relationship with the departments involved at the Ministry of Finance (DEPF, DB and DAAG). However, interviewees suggested that there was a need **to include staff from other key departments** in the Ministry of Finance, such as the Treasury. According to interviewees, staff in the DB or Treasury departments do not routinely mention gender when negotiating with the EU on sectoral budget support or in discussions with the Belgian Cooperation. Additionally, efforts need to be made to **raise awareness more broadly at the national government level**. Several interviewees observed that UNIFEM’s primary focus on the Ministry of Finance may have contributed to pursuing

³³ This section reports results and efforts in relation to Outcome 1, Output 2, “Capacity and commitment established in Ministries of Finance and other relevant government institutions to incorporate gender-sensitive budget guidelines and indicators in their budget formulation and monitoring processes”. For country-specific outputs contributing to this outcome, see Annex 5.

³⁴ UNIFEM has also interpreted this more narrowly to mean that the Prime Minister “invited the ministerial departments to [develop] gender-responsive indicators” (MTR 2006 p. 2).

a technical approach to GRB at the central level rather than a broader change in commitment and approaches.³⁵

Engagement of civil society and parliamentarians³⁶

The theory of change for Phase II included engagement mainly with planning and budgeting actors, with **accountability actors** playing an implicitly assumed (rather than explicitly encouraged) role of oversight, monitoring and holding to account. In addition to the national women's machinery, these actors include parliamentarians and CSOs. This aspect of the programme is particularly challenging in Morocco because of the absence of a strong culture of civil society and parliamentary engagement in public accountability processes.

Late in Phase II, **two workshops for NGOs** were organized, resulting in the creation of a steering group.³⁷ For these NGO workshops in July and September 2008, more than 20 NGOs were invited based on a number of objective criteria (work in the field of Women's Human Rights, dynamism in field of advocacy, reputation, scope).³⁸ The main objective of these meetings was to promote the NGOs' ownership/buy-in of GRB concepts and to familiarise them with the results-based budget reform. The wider goal was to support civil society to fully perform its supervisory role over the gender impact of public policies, advocacy efforts targeted to parliamentarian and government officers as well as its advisory role vis-à-vis parliamentarians in the formulation of their questions during the presentation and the discussion of the Finance Bills.

35 Interviewees who made this point included those from the EU, Belgian Cooperation, Ministry of Education and the Ministry of Agriculture.

36 This section reports results and efforts in relation to Outcome 1, Output 3, "Women's rights groups, parliamentarians and gender equality experts are effective at using GRB to advocate for and monitor budget-related processes, including poverty strategy documents/PRSPs, MDGs, and other budget processes". For country-specific outputs contributing to this outcome, see Annex 5.

37 The Fifth Progress Report (2007, p. 15) mentions that UNIFEM facilitated meetings between women's organizations and the Ministry of Economy and Finance between February and July 2007, but no further documentation was found.

38 See workshop reports obtained from UNIFEM staff: Rapport d'évaluation de l'atelier de sensibilisation et de réflexion sur le rôle des ONG dans le processus de Budgétisation Sensible au Genre; and Programme Budgétisation Sensible au Genre, 2ème Session, Atelier de sensibilisation et de réflexion sur le Rôle de la société civile dans le processus de Budgétisation Sensible au Genre, Session : 19-20 Septembre 2008, Rapport.

No activities were held with parliamentarians. The reason for this given in the Sixth Progress Report (2007: 16, 21) was that the Ministry of Finance does not have the **mandate** to invite parliamentarians to training activities and that informal contacts with MPs would be necessary so as to stimulate a direct request from them to learn more about GRB and the Gender Reports. In the de-briefing meeting of the evaluation visit to Morocco, the head of DEPF reported that this obstacle had been overcome. Other reasons given for not working with parliamentarians included the **parliamentary elections in September 2007**. According to an interviewee at the DEPF, in contrast to the 2008 Gender Report, the 2009 Gender Report was not much debated in Parliament. This may be due to the lack of skills and capacity in the new MPs and the lack of engagement with NGOs.³⁹

The NGO steering group at the end of the workshops prepared a series of questions based on their analysis of the 2009 Gender Report, which they planned to address to Parliament and executive officials. However, this action was not carried out in time for parliamentary debate of the 2009 Finance Bill. The UNIFEM Final Report mentions that this was due to a heavy agenda on both sides (including the proposed revisions to the electoral law and the communal charter and the priority given by NGOs to advocacy aimed at mainstreaming gender concerns in these laws, rather than the Gender Reports). However, the evaluation team found that there are more systemic obstacles. NGO representatives at the focus group meeting reported **difficulties in accessing the Gender Report**, both in terms of a physical hard copy as well as in terms of its readability and language. They also complained about the lack of time between the publication of the report and the parliamentary debates, and that their requests to meet with Ministry of Finance staff during the drafting of the Gender Report were turned down. The Ministry of Finance

39 Phase I included a guide to GRB in the context of the budget reform published in 2005 and disseminated to NGOs and MPs, but this is outside the scope of this Phase II evaluation. (See Ministère des Finances et de la Privatisation and UNIFEM: Guide de la réforme budgétaire: La nouvelle approche budgétaire axée sur les résultats et intégrant la dimension genre, 2005.)

staff, on the other hand, see NGOs playing a role after publication of the Gender Report, not during. The main challenge in this area was correctly identified in the programme document (UNIFEM 2005, p. 12): “The dialogue between public administration and civil society can pose challenges in the sense that **an evaluation culture can be misunderstood** and be perceived as being negative and confrontational”, yet no significant measures seem to have been taken to mitigate this risk, at least not until 2008. Over the last year, UNIFEM staff made considerable efforts to mediate between these two stakeholders and to identify relevant MPs for NGOs to approach with the prepared questions. The outcome of these efforts should be evident during 2009.

Changes in budget allocations and analysis⁴⁰

In terms of concrete changes in budget allocations and analysis resulting from the Gender Reports, the 2009 Gender Report (p. 7) claims that there is a growing ownership of the gender-budgeting approach, and that at the sectoral level, the first impacts are very positive, particularly in the areas of development for rural women, education, literacy and access to basic infrastructure. The 2006 Meeting report of the Partner’s Meeting (p. 11) and a UNIFEM press release of March 2007⁴¹ both mention the increase in the Ministry of Agriculture budget line allocated towards targeted livelihood activities for women (from 5 million dirham in 2002 to 6.3 million dirham in 2006) as an example of a concrete change in allocations. However, according to interviewees at the Directorate of Teaching, Research and Development (DERD), this constitutes only 2 to 3 per cent of the total budget for extension activities. In addition, given that many other government and donor initiatives target this and the other areas, it is impossible to attribute progress in these areas solely to the GRB programme.

40 This section reports results and efforts in relation to Outcome 2 that “the priorities of poor women were reflected in budget allocations for national programmes addressing poverty”. For country-specific outputs contributing to this outcome, see Annex 5.

41 UNIFEM: Gender Responsive Budgeting Integrated in Budget Reform: Highlights of Best Practice from Morocco, March 2007.

Information extracted from the 2009 Gender Report provides evidence with regard to the **lack of gender-sensitive (as distinguished from sex-disaggregated) indicators and information systems** in the vast majority of ministerial departments that are contributing to the Gender Report (see Annex 9). It also highlights the dominance of input indicators over performance indicators.⁴² This is linked to the often-mentioned (both in the report itself as well as by interviewees) confusion among input, means, activity, results, performance and impact indicators, revealing an inadequate capacity to use a results-chain approach (Burn 2008, pp. 7, 22). Similarly, and as confirmed in the interview with the World Bank economist, most departments have prioritised the quantity of indicators over quality. Many departments and interviewees also emphasised the need to integrate the gender dimension in upstream planning and programming, not only in output and performance evaluation.⁴³

The table of available indicators (Annex 9) demonstrates the **significant variation across departments in the availability of gender-responsive data and indicators**. This is partly explained by the fact that departments adopted the budget reform at different times (between 2002 and 2008). However, the evaluation team concluded that variations in understandings of the gender and GRB concepts also impacted on practice.⁴⁴ The answers to the focus group questionnaire showed that the concept of gender is not understood in the same way by all: on the substantive questions that asked participants to define gender and GRB, the answers show a wide range of understandings.⁴⁵

42 The Report on GRB and the Aid Effectiveness Agenda by Nalini Burn (2008, p. 7) makes the same observation.

43 During the interview with the EU representatives, it was suggested that UNIFEM should work more on mainstreaming gender in the MTEFs, given the huge amounts involved, for example, the EU and other pooled donor support for the education sector will amount to 500 million Euro starting in 2010.

44 Although it is very probable that personal convictions on the part of civil servants influence the way in which they engage with and apply GRB concepts, the evaluation did not find hard evidence for these.

45 See Annex 8 for summary of responses.

In some ministerial departments, GRB was understood as a budget that contained separate allocations for men and women in the general budget. For example, the DERD in the Ministry of Agriculture introduced a specific budget line for socio-economic promotion of rural women in 2002. In the interview, the gender focal point in DERD stated that this budget line is considered as constituting GRB: At the Ministry of Health, the understanding that maternal health programmes constitute a gender approach dominated among the interviewees. As the gender advisor to the Minister of Social Development explained in the interview, *“In many cases GRB is not done out of ignorance; civil servants say ‘we are providing public service to all [and shouldn’t discriminate against men]’, a lot is needed to change this. The same gender advisor claimed that in general, ‘Gender is still understood as a programme for women’”. Staff interviewed at UNICEF confirmed this view, saying that. “So far mostly people think GRB is a budget for women or budget for women at the expense of budget for men”.*

Sectoral pilots did not get underway until 2007, when workshops were held with the two pilot departments (Department of Vocational Training in the Ministry of Employment and the Department of Literacy and Non-Formal Education in the Ministry of Education). Workshops organized in 2008 were targeting staff from three additional departments (from the Department of Employment, Department of Health, and the Department of Economy and Finance).

Increases in budget allocations were observed for reproductive health and girls’ schooling. However, these changes cannot be attributed to UNIFEM alone. There is high international pressure to reach the MDGs and address Morocco’s very poor HDI ranking. Other donor programmes in the education sector (which takes up 28 per cent of the state budget; see GR09 p. 105) include EU budget support and the FAES funded by Canadian

CIDA⁴⁶ (supporting a Strategic Medium-Term Action Plan to Institutionalize Gender Equality in the public sector during 2008-2011; see GR09 p. 103).⁴⁷ In addition, the Plan d’Urgence for the Education Sector for 2009-2012 (representing the sectoral MTEF) includes one project (project 6) to develop the gender approach in the education and training system, strengthen the efforts to promote girls’ schooling as well as eliminate sex disparities in children’s access to compulsory schooling by 2015.⁴⁸ The UNIFEM **sector pilots have contributed to strengthening capacity with regard to gender-responsive programming, budgeting** and monitoring, thereby **complementing** the activities of other donors working to achieve the positive outcomes that have materialised.⁴⁹ In Phase III, it may be advisable to support work for establishing or improving the departments’ information and data-collection systems in order to effectively monitor and track gender in programming, budgeting and evaluation.

The outputs for Outcome 2 in the country log frame (2005) include the **CBMS**, mentioned in section 6.1 above. While it covers a very small geographical area (two municipalities), the GRB programme has started to make links between the CBMS and the process launched by the General Directorate of Local Authorities (DGCL) of the Ministry of Interior, with the support of UNICEF, for the development and generalization of a Municipality-Based Information System (CBIS) as a basis for the development of Municipal Development Plans (CDP), which will soon

46 <http://www.acdi-cida.gc.ca/CIDAWEB/cpo.nsf/vWebCSAZFr/84476A06F191737285256FCF0036F783>

47 See: Ministère de l’Education Nationale, de l’Enseignement Supérieur, de la Formation des Cadres et de la Recherche Scientifique: Plan d’action stratégique à moyen terme pour l’institutionnalisation de l’égalité entre les sexes dans le système éducatif 2009-2012, Septembre 2008; see also <http://procadem.men.gov.ma/Composantes/Egalite.html>

48 The increase in rural girls’ school enrolment rates over 1999/2000 to 2004/2005 was presented as an example of ownership of the GRB programme; the same evaluative judgement applies here (see PPT by Chafiki and Touimi-Benjelloun: ‘Etude de cas: la Budgétisation Sensible au Genre au Maroc, illustration des principes d’Alignement et d’Appropriation de la Déclaration de Paris’, at L’Efficacité du Développement en Pratique: Atelier sur l’application de la Déclaration de Paris pour l’avancement des questions transversales, Dublin, 26-27 Avril 2007), available at <http://www.finances.gov.ma/genre/pdf/PresentationDublin.pdf>.

49 Although some of the sex-disaggregated indicators already existed before the GRB intervention.

become mandatory for all Moroccan rural municipalities.⁵⁰ A first working session held in November 2008 in the context of the Multisectoral programme for the combat of gender-based violence (MDG-Gender) and with the participation of the DEPF, DB, DGCL, HCP, UNICEF, UNIFEM, CBIS and CBMS experts revealed some complementary between these two systems. The CBMS is a very rich observation system covering different levels (household, individual and community) and all aspects of development from a gender perspective. In contrast, the CBIS is a gender-blind information system, but it is fully computerised and can be easily processed. It was decided that the two tools (CBIS/CBMS) would be **integrated** into one information system at the community level that can respond to the requirements of the gender-responsive local development planning. At the same time, by using the CBIS “infrastructure”, this new integrated tool would be easier to deploy, more cost effective and more easily accessible and user-friendly than the CBMS approach, which is “heavy” in terms of its human and material resource requirements. The programme teams prepared terms of reference to undertake the effective integration of these two systems and the testing on the ground of the proposed solution in at least two target communities. It is expected that this activity will be finalised in Phase III. If the CBMS and CBIS are successfully integrated and used to develop the CDPs, **changes in budget allocation at the municipal level may well follow** in the medium- to long-term.

Linkages and learning⁵¹

Phase II included two sets of activities designed to enhance GRB: learning mechanisms and Knowledge Management (KM), respectively. GRB learning mechanisms comprise the revamped and updated GRB portal on the website of the Ministry of Economy and Finance,

maintained by DAAG.⁵² It contains information from the GRB Handbook and other studies, as well as links to the Gender Reports and GRB workshop materials. In addition to the website, a video was produced, and DAAG published articles related to the GRB activities in its electronic news letter “e-maliya” as well as its institutional journal “AL MALIYA”.⁵³ However, the evaluators found that the DAAG’s communication strategy has **not been implemented in any consistent way**, due mainly to human resource constraints and the lack of institutionalization of this work in the Ministry of Economy and Finance. As already mentioned, UNIFEM and the Ministry of Economy and Finance organized a media-based event in spring 2009 (originally planned for end 2008) to raise awareness about GRB and its context, objectives and partners, and to communicate the most significant achievements of the programme, Phase II in particular.

Terms of Reference for technical assistance were developed jointly by UNIFEM and DAAG to support the systematization of the documentation process and the dissemination of GRB-related knowledge and learning. The main outputs are, first, a “modelling report” that traces the chronology of the GRB experience in Morocco, key documents, and the lessons learned and best practices. A second planned output—not yet achieved—is the establishment of an electronic management system of the documents, materials, publications and tools produced in the context of the programme, starting with their preparation, classification and indexation and the creation of research and consultation interfaces.

Another KM component is a GRB e-learning system; this comprises a sequence of modules, drawing their content from the electronic management system (second output). It is expected to play a major role in the training and certification of officials in charge of budget planning and

50 Ministère de l’Intérieur, Direction Générale des Collectivités Locales (DGCL): Guide pour l’Elaboration du Plan Communal de Développement (PCD) Selon L’approche de Planification Stratégique Participative, Juin 2008.

51 This section reports results and efforts in relation to Outcome 3 “that knowledge and learning on gender responsive budgeting facilitated replication of effective and good practices”. For country-specific outputs contributing to this outcome, see Annex 5.

52 See http://www.finances.gov.ma/portal/page?_pageid=73.17816083&_dad=portal&_schema=PORTAL.

53 So far only one issue of this journal (38th issue, June 2006) included a special section dedicated to GRB; see http://www.finances.gov.ma/portal/page?_pageid=75.17823685&_dad=portal&_schema=PORTAL.

design in the concerned ministries as a prerequisite for engagement in the results-based and gender-responsive budget reform. It is planned that the system will be used in the Ministry of Finance Training Institute (Institut des Finances pour la Formation, see GR09, p. 29), as well as being integrated into the curricula of other prestigious institutes. This would follow up on a recommendation in the 2006 Midterm review (p. 7) to include GRB in high-level technical training courses (ISCAE) for the staff of the Ministry of Finance and for those in charge of the budget within sectoral departments.

The KM component thus offers good perspectives for the dissemination of experience and knowledge transfers. For this purpose, UNIFEM and the Ministry of Finance plan to create a **Centre of Excellence** on GRB for francophone and Arabic-speaking countries. While UNIFEM's sub-regional strategy for North Africa 2008-2009 (2007, pp. 2, 9) insists that Morocco would serve as a model for the extension of the initiative to Algeria, Tunisia, Libya and Mauritania, the evaluation findings point to the priority of strengthening the communication and dissemination of the GRB programme outputs at the national level and involving other relevant stakeholders such as the National Women's Information and Documentation Centre of the Ministry of Social Development.⁵⁴ All these activities are to be finalised in Phase III.

The Moroccan GRB experience is widely seen as being at the forefront of GRB worldwide, and UNIFEM is understandably keen to showcase it at the international level. Phase II thus included numerous trips by key programme stakeholders to international conferences, round tables and other events. The Final Report lists no less than ten such events during Phase II. The Ministry of Economy and Finance and UNIFEM also facilitated several study tours to Morocco, hosting country delegations from Senegal, Indonesia, Comoros and Palestine in 2008. There have also been some contacts with partners in Chile, although

they have not yet led to an institutionalised partnership.⁵⁵ In the briefing meeting, the DEPF director remarked that the international partnerships promoted as part of the GRB program are not based on a strategic vision but limited to presenting case studies. Phase III should build on the emerging demand for partnerships.

Key findings

The GRB Programme in Morocco has, to date, achieved a number of **significant results** that can be linked to outputs or outcomes in the log frame. Overall, the programme focused on changing major national processes of public finance management in a country where, until recently, the culture of evaluation of public programmes and policies was non-existent. This naturally limited the achievement of short-term, concrete results. Key results were:

The yearly inclusion of a paragraph on gender issues in the **Budget Call Circular Letter**

Publication of yearly **Gender Reports** with an increasing number of contributing departments, and improved reflection on gender-sensitive indicators for evaluating public programmes and policies

Inputs to **sectoral pilots MTEFs and budgets**, with gender-sensitive indicators drafted

Real changes in budget allocations were identified for a few selected areas. These were the result of the GRB Programme and other programmes focusing on gender equality

In order to achieve these results, **UNIFEM successfully built relationships with key budget decision makers** in the Ministry of Economy and Finance and made some headway in building relationships between NGOs and the Ministry.

⁵⁴ See programme documents and UNIFEM: Sub-Regional Strategy for North Africa, 2008-2009 (2007).

⁵⁵ See Third Progress Report (2006, p. 21) and interviews.

Building on this success will require:

A **more strategic engagement** with the budget planning, allocation and execution processes, as well as raising awareness about GRB concepts more broadly within public administration.

A more strategic approach to **engagement of NGOs and parliamentarians**.

The key linkages that remain to be strengthened to ensure that this work is reflected in concrete and large-scale changes in budget allocations are between the Ministry of Economy and Finance and the “demand/accountability” side of GRB, i.e. the women’s machinery, civil society and Parliament.

6.3 Sustainability

The continuation of benefits from a development intervention after major development assistance has been completed. The probability of continued long-term benefits. The resilience to risk of the net benefit flows over time.

Sustainability is reviewed in terms of the extent to which the UNIFEM programme put in place the partnerships and procedures that will enable continued work on GRB after the lifetime of the programme and whether it acted as a catalyst for independent action on GRB. The main difficulty faced by the evaluation team in assessing this issue is that many outputs of Phase II are still pending (e.g. CBMS, learning mechanism and Knowledge Management) so that it was not possible to fully evaluate their sustainability.

In terms of the sustainability of capacity-building in the area of the Gender Reports, the evaluation team found that **the annual Gender Reports have become institutionalised** and are now a recognized part of the documents submitted with the draft Budget Law, with almost all ministerial departments contributing their inputs.

Sufficient capacity exists in the Ministry of Economy and Finance to continue training staff from various departments on gender and GRB.

However, **securing ownership** of the process is very much dependent on whether there is buy-in at the director level, not just ministerial or operational level. Staff members in contributing departments have expressed their misgivings that the report is imposed by the Ministry of Economy and Finance (and the DEPF gender unit in particular). This is linked to the **lack of institutionalization of gender focal points** in most departments and of staff performance incentives for including gender in sectoral planning, budgeting and evaluation.⁵⁶

A notable exception is the Ministry of Justice, which is very advanced internally, having conducted a gender audit of the judicial system in 2008. It has produced numerous studies on the situation of women in Morocco. It is also institutionally very well equipped with a strong gender unit, established in June 2005 at the level of the General Secretariat, and including eight gender focal points representing all directorates that are also called to play a role in upstream programming. Similarly, in the department of Maritime Fisheries, a gender and development unit was created in July 1999, which was institutionalised and attached to the General Secretariat in 2001, although its remit is limited to development programmes that promote women in the Fisheries sector (GR09, p. 145). The Ministry of Finance itself highlights the lack of quantitative indicators related to activities aimed at institutionalising the gender approach (GR09, p. 35).

⁵⁶ Nalini Burn (2008: 29), the international consultant supporting the GRB Programme since its inception, describes the major difficulties encountered and lessons with regard to the Gender Reports in a similar way.

Key findings

The capacity-building activities linked to the **Gender Report** have fostered the necessary skills and ownership at the DEPF to ensure the publication of the annual Gender Report and, in some sections of the DB, to support sectoral gender-responsive planning and budgeting.

The programme needs to draw from the example of the Ministry of Justice in order to identify and support the **changes in institutional procedures** (such as strong gender focal points in key positions) **and high-level commitments** needed to ensure the sustainability of GRB after the UNIFEM programme has ended.

7. Programme strategies

This section reviews the key approaches used by UNIFEM to achieve results, assessing the strategic usefulness of different approaches. How approaches were implemented is examined and difficulties and challenges identified.

7.1 Capacity-building

Building capacity of technical staff in planning and finance ministries was a critical element of the programmatic logic for Phase II of the GRB Programme. Capacity-building served the purpose of strengthening relationships among key actors (DB, DPEF, sectoral departments, NGOs), as well as enabling them to develop the Gender Reports, sectoral budget analysis and advocacy strategies.

During Phase II, there were 17 workshops (excluding the 2 organized for NGOs in 2008)⁵⁷: 5 were on the Gender Report, 5 and 4 for the literacy and vocational training sector pilots, respectively, and 1 for health, employment and the Ministry of Finance, respectively (the three additional sector pilots were added in 2008). Additionally, more targeted workshops (e.g. for the MDG Costing Study in December 2005) were held but are not included here.⁵⁸

Of the 325 participants, there were almost 90 staff in the Ministry of Economy and Finance who participated in most workshops and most consistently, reflecting the strong focus of the Phase II programme on this

stakeholder.⁵⁹ The list also reveals the discontinuity in some of the individual participants' attendance, an issue that several interviewees said was hampering the development of their capacity to apply GRB. This is due to the fact that the selection of workshop participants is at the discretion of the administrative hierarchy in each ministry.

The focus group session held by the evaluation team included a written questionnaire with questions regarding the changes brought about by the workshops. This section summarizes the participants' responses.

Most interviewees thought that the content of the workshops was adapted to their work or job description: eight participants gave an unqualified "yes", two qualified their answers by saying "for some activities like the budget preparation" and only one answered with an outright "no".

However, some interviewees and stakeholders remarked that while the workshops were very well facilitated and time-managed, overall there was not enough time for the workshops to go into any depth as to how to apply GRB at the level of sectoral programming and budgeting, and that the concern for preparing the Gender Report overrode other concerns such as partnership and continuous support. As one interviewee expressed it, "*the purpose of the workshops should not be to own a Gender Report but to own the approach itself*".

⁵⁷ UNIFEM staff were unable to provide a comprehensive list of capacity-building workshops to the evaluation team but were able to provide separate lists of workshop participants, which the evaluation team analysed and used as the basis to establish an overview of all workshops held as part of Phase II (except for the 2008 Gender report workshops). This is appended in Annex 5.

⁵⁸ The Fifth Progress Report (2007, p. 13) mentions that the programme organized five 1-day training and sensitization workshops in February and March 2007 for the staff from departments contributing to the 2008 Gender Report, and the participants' lists can be found in the appendix of Nalini Burn's mission report.

⁵⁹ Annex 6 (and accompanying Excel file) presents a list of all workshop participants, their ministerial/departmental affiliations and in most cases their position in the public administration.

A number of interviewees indicated that the workshops had a positive impact on the participants' organization. The workshops benefited from the Handbook on GRB,⁶⁰ which was developed during Phase I and eventually published in 2006, i.e. during Phase II.⁶¹

However, there were doubts about the extent to which the workshops would enable systematic and comprehensive application of GRB concepts.⁶² Responses to the question, "Were you able to apply what you learned in your work?" gave a mixed picture: four answered "no", seven gave a qualified yes, e.g. "Sometimes, if the superiors accept the proposals", and only one gave an unqualified "yes". These responses reflected concerns about constraints within ministerial departments rather than a lack of technical knowledge on the part of participants.

The two workshops for NGOs held in 2008 were co-facilitated by senior officers from the Ministry of Economy and Finance (DEPF and DB) and a national consultant. While they appreciated the chance to interact with officials from the Ministry, NGO members present at the focus group meeting found that the workshops were too basic and would need to go more in depth on the technical aspects of GRB and budget reform. This is also reflected in the workshop reports. Nevertheless, at the end of these sessions, the participating NGOs decided to create a consortium of NGOs advocating for GRB, adopt a charter for this consortium (internal regulations), elaborate a workplan for the immediate actions to be undertaken in conjunction with the presentation of the 2009 Finance Bill before the parliament and designate a committee for monitoring and implementation of the agreed on actions. However, as

60 Manuel sur l'Intégration de la dimension genre dans la planification et l'élaboration du budget, 2006.

61 The Handbook is not part of this evaluation given that it is a Phase I product. It would need to be updated if it is to be relevant for Phase III. In particular, it includes a section on the National Five-Year Plan (Plan de développement économique et social), which has been discontinued and replaced by the INDH and sectoral multi-year strategies and MTEFs.

62 Responses to questions about whether departments were applying GRB included the following: "There is no appropriate and special structure/unit for gender; GRB is not yet applied in the Ministry of Finance and Economy; it is not yet applied in the Department of Vocational Training" (one of the pilot sectors for GRB).

noted earlier, these decisions have not yet been followed up by concrete actions.

Key findings

The programme trained a significant number of civil servants on GRB concepts (especially programme evaluation and indicator development), and they generally considered the workshops to have been well organized and facilitated.

Effectiveness was limited by institutional and organizational constraints in public administration, which reduced the participants' ability to apply what they learned in their work.

Awareness-raising with NGOs was very relevant, but future workshops should focus more on the budget process than gender and GRB concepts.

7.2 Sector piloting

According to the interviewees, the sectoral pilots were chosen according to whether they "lent" themselves to GRB: i.e. where budget allocations are targeted towards individuals, where women constitute a large share of beneficiaries (such as in education and training) and MDG areas (such as literacy) where girls and women are particularly lagging behind.⁶³ The 6th Progress report (UNIFEM 2007d: 18) states that "These two departments were selected because they are both in the process of integrating the budget reform framework into their planning and budgeting systems. Also, both secretariats have a mandate that is relevant to women's empowerment: illiteracy among women is prevalent in Morocco and providing access to relevant vocational training for women is also a pressing issue". The Country Office, as mentioned earlier, suggested that the main criteria for selection was the departments' status vis-à-vis the budget reform, and that

63 According to the 2007 Gender Report, the World Bank also financed TA to support six pilot departments to implement budget reform, but it is unlikely that this influenced UNIFEM's choice of sectors.

the Ministry made a conscious choice to introduce gender from the start as part of the budget reform, rather than risk it being perceived later by stakeholders as an “add-on”. However, as pointed out earlier, this strategy may have overestimated the departments’ capacity to implement reform and suffered from a lack of linkages with other manuals and tools of the budget reform (developed with World Bank support and gender-blind).

During the interview with the gender focal point in the Department of Vocational Training, an extract from the 2009 Finance Law was shared with the evaluation team. It includes sex-disaggregated indicators on the percentage of female trainees and female graduates. However, further probing revealed that these indicators in fact existed before the GRB workshops due to the nature of the vocational training programmes themselves. This seems to be the case also for the literacy and health departments. Hence, rather than focusing on improving these indicators, training on upstream gender analysis to inform programming and budget allocation, or support to (gender-sensitive) data collection systems further downstream might have been more effective.

The sectoral pilot workshops were facilitated by the international GRB consultant and focused on defining gender-sensitive indicators and budget fascicles⁶⁴ covering 14 programmes. This is a significant achievement given the very recent introduction of the results-based budgeting and management in Moroccan public administration. However, the staff members who attended the workshops were selected by the administrative hierarchy, for example, following suggestions from the gender focal points, which may mean that the programme did not necessarily train key persons in charge of programming and budgeting.

64 “Fascicles” is the technical English translation of the French term *morasses budgétaires*. These are very detailed booklets, annexes to the Finance Bill, which show separately the operating expenditures including payroll but not members of staff per ministry, the investment expenditures and the staffing details. These booklets are made available to Parliament and to the public during the presentation of the finance bill (Burn 2008, p. 19).

Key findings

The coverage of 14 programmes in GRB sectoral pilots is a significant achievement, although follow-up should focus on continued support from DB in making corresponding changes in budget allocation.

Effectiveness could be enhanced by including not only the development of gender-sensitive indicators but also data collection and information systems.

7.3 Evidence-based advocacy

Women’s machinery and NGOs were only marginally involved in Phase II. This was because of institutional changes (in the women’s machinery) and lack of agreement between NGOs and the Ministry of Economy and Finance about the role of civil society. This meant that there were no coherent activities to build bottom-up advocacy for GRB and gender equality goals or to effectively link actors in civil society to accountability institutions in order to amplify demand for more gender-responsive public policies and programmes.

The political context of Morocco has also created challenges for engagement of the GRB Programme with parliamentarians. Some interviewees thought that since Parliament approves the budget, it is central to promoting GRB and should demand that GRB be mainstreamed in all government programmes. However, some also expressed serious doubts about the parliamentarians’ current capacity: “*They first need to be made aware of the gender question before they can be asked to play a role in GRB*”. Others pointed to structural limits to the Parliament’s power to hold the executive to account (see section 4).

As indicated in section 6.2., the Ministry of Economy and Finance staff and NGOs disagree on what role the latter should play in using the Gender Report as an advocacy tool. Over the last year, UNIFEM staff made considerable

efforts to mediate between these two stakeholders and to identify relevant MPs for NGOs to approach with the prepared questions.

These efforts have provided the foundations for Phase III. The evaluation team found that there is now a strong consensus that NGOs need to be more involved in the GRB process through mobilization and popularization, advocacy and monitoring the integration of gender approaches in the government budget. In particular, the evaluation team found strong support for the engagement of Women's Rights NGOs with situation analysis/ taking stock of the real needs of the various categories of people targeted by the activities of each department, raising awareness among the population in terms of women's rights and lobbying for the institutionalization of GRB (especially in the budget law). Thus, **UNIFEM** could build on this enthusiasm from government staff in various departments and help to link women's NGOs activities and advocacy to their own.

The studies produced under Outcome 2 (MDG costing, the review of gender-sensitive data in Morocco and the CBMS) and the knowledge management products (outputs from Outcome 3) have not been disseminated widely or are not yet finalized, which **hampers their utility as potential advocacy tools**. Phase III will be able to capitalise on this work.

Key finding

The lack of an overall advocacy strategy and disagreements between key stakeholders meant that opportunities to build on specific achievements were not fully exploited.

7.4 Partnerships

UNIFEM's focus on the Ministry of Economy and Finance as its key partner in implementing the GRB Programme was justified given the importance of the budget reform as an entry point for GRB. However, in Phase III, UNIFEM should (re-)engage with other potential partners (World Bank, HCP and women's machinery more recently) to maximise its impact and leverage (see section 6.1 for potential linkages).

The Programme aimed to create partnership links through the mechanism of a steering committee. The GRB technical team composed of staff from the DEPF, the DB, the DAAG and UNIFEM was responsible for preparing annual workplans and submitting progress reports to a Steering Committee. It was envisaged that this Steering Committee would be composed of the DEPF, DB and DAAG for the Ministry of Economy and Finance, the national machinery for the advancement of women (the Secretary of State in charge of the Family, Children and the Disabled—SEFEPH—which later became a Ministerial Department), the World Bank and UNIFEM.⁶⁵ The Midterm Review report (2006, p. 4) mentions the need to include the HCP, SEFEPH and the World Bank in the steering committee. Other implementing partners that were consistently listed on Programme Progress reports to the donor also included the Agency for Social Development (ADS), parliamentarians, selected line ministries, the High Commission for Planning (HCP), NGOs and universities. However, several of these partners did not participate at all or only marginally. Involving these stakeholders would require detailed Memoranda of Understanding to clearly determine these actors' roles vis-à-vis that of the Ministry of Economy and Finance (and the DEPF in particular). A stronger role for the Ministry of Social Development would also help to respond to the Prime Minister's circular of 2007 that put

65 UNIFEM (2005): Global UNIFEM Programme in Gender Responsive Budgeting Phase II: Moroccan Component, Implemented by the Morocco Ministry of Finance in partnership with UNIFEM, p. 12.

this Ministry in charge of gender mainstreaming in the government. **This would require adapting the Phase III programme document** (p. 12)⁶⁶ to the Moroccan context, as it **currently calls for (even) more leadership by the Ministry of Economy and Finance** (see Output 1.1).

UNIFEM staff also had to devote considerable time and energy to clearly define roles and responsibilities of each stakeholder within the Ministry of Finance, i.e. DAAG, DPEF and DB (by drawing up terms of reference), and to staying sufficiently flexible to respond to changes in the external context (MTR 2006, p. 4), notably the women's machinery.

More recently, UNIFEM successfully linked GRB to two new programmes launched in 2008: one being "Mainstreaming of Gender Responsive Budgeting in the Aid Effectiveness Agenda", and the other being the multisectoral programme for combating gender-based violence in Morocco, involving eight UN System agencies (UNIFEM, UNFPA, UNICEF, International Labour Office, FAO, UNESCO, UNHCR and UNAIDS), thirteen Ministerial

Departments and civil society partners. This programme includes a GRB component and UNIFEM plans to implement it in coordination and synergy with Phase III of the GRB Programme. Since 2008, UNIFEM has also started to collaborate with ILO, FAES and the Ministry of Employment to engender the latter's programmes and structures.

Key findings

The steering committee did not function with the membership envisaged at the outset, and there was no follow-up to ideas for including new partners.

A stronger role for other partners, especially the Ministry of Social Development, may be at odds with UNIFEM calls for more leadership by the Ministry of Economy and Finance.

Partnership with other UN agencies and donors could have been strengthened to enhance effectiveness of programme activities, but recent developments are more promising.

⁶⁶ UNIFEM: Up-scaling Gender Responsive Budgeting for Accelerated Action toward Gender Equality. Phase III (2009-2011). September 2008.

8. Programme management

This section assesses the evaluation question of how effective UNIFEM has been in ensuring adequate human, financial and technical resources towards the programme. In assessing effectiveness, the evaluation team examined resources in terms of institutional systems and organizational assets of personnel and funding.

The **planning, monitoring and evaluation** mechanisms for assessing progress in the GRB Programme in Morocco have been the same as those used throughout the programme overall, i.e. development of a logical framework and regular submission of narrative and financial reports to the Belgian government using a standard format. The **logical framework** was used to report to the Belgian government (see Annex 5 for country log frame 2005 and changes in 2008). However, **lack of monitoring mechanisms** (apart from the annual workplan) meant that this was largely activities-based reporting, with little basis for assessment of progress towards results.

The **Midterm review** (MTR) process for the Global GRB Programme took place in each country in mid-2006 “through an internal and external process” with a Partners’ Meeting in Morocco in November 2006⁶⁷ to build on the findings of the MTR. In Morocco, the MTR was conducted by UNIFEM and Ministry of Economy and Finance (DPEF/ Gender Unit as well as DB and DAAG) teams and resulted in a fairly comprehensive yet concise report. However, interviewees mentioned that the international character of the MTR meeting meant that “internal” matters (such as the quality of the Gender Report workshops) could not be discussed.

There were **frequent changes and gaps in staffing**: UNIFEM hired an international coordinator because national expertise in GRB was lacking, but the recruitment process took some six months, and the person left after

eleven months in the post. To avoid delays in international recruitment, a national programme coordinator was hired. Before the current GRB Programme coordinator arrived in mid-2007, the programme was managed by three different people, as well as the regional director and an intern, all of whom had or have other responsibilities, and none of whom had any (substantial) prior expertise on GRB. The **technical support** in GRB available to staff—apart from the international programme coordinator and more targeted technical assistance for the various studies and reports—was principally the engagement of one international consultant making periodic visits to Morocco.

The Morocco team adopted a **pragmatic approach** grounded in the realities of the Ministry of Economy and Finance and saw their main task as implementation and adjusting to changing circumstances. As the UNIFEM regional director put it, everyone “*learnt by doing*”. While this is to some extent unavoidable, it may have been useful to periodically reflect on the overall programme logic (see section 5.1) and check the components and underlying assumptions in the results chain that would need to be fulfilled in order to make progress towards the overall objective. This point is illustrated by the following statement in the MTR report (2006 p. 4).⁶⁸ Under the heading “Ensuring a sustainable anchorage of the programme in women’s poverty reduction”, it states,

One should avoid self-complacency or formalism about implemented activities, and rather systematically question the quality of the work done and the actual impact of actions undertaken in respect of poor women’s conditions. What is the objective of the programme? What indicators are likely to highlight the changes and achievements made?

67 See UNIFEM meeting report.

68 UNIFEM & Ministry of Finance and Privatization: Mid-Term Review Report Gender-Responsive Budgeting Programme, Morocco, Phase II, September 2006.

The evaluation team did not find evidence suggesting that the UNIFEM team had the opportunity to consider these questions in-depth or document and periodically review their reflections on the longer-term programme outcomes. Similarly, the same report (2006, p. 7) includes two lines on the need to do a risk assessment for the programme, but the relevant questions that are asked (e.g. on elections) do not seem to have been answered, at least not in a documented format.

Nevertheless, the evaluation team found that UNIFEM staff in Morocco showed **great commitment and dedication** to the GRB Programme, as well as impressive capacity to build personal networks and “manage the politics” of institutional relationships within and between government departments.

Comprehensive **programme documentation was filed, but not systematised**, as is the case with the various workshop lists of participants cited earlier. Staffing changes also affected the completeness of the records (e.g. participant lists for 2005 did not exist or could not be found). Programme documentation was filed on personal computers, i.e. affected by changes in staffing. In Morocco, none of the current core staff working on the GRB programme had been in post for the MTR Partners’ meeting (November 2006). UNIFEM staff in Morocco did not report any issues with the **financial management systems or budget constraints**.

There were some significant **delays in programme implementation** compared with annual workplans (and the country implementation plan), which UNIFEM staff attributed to issues related to consultants (especially the CBMS study) and to the programmatic choice to anchor the programme in the budget reform process. For example, the workshops to apply the GRB manual to sectoral policies, programmes and subprogrammes were planned for 2006, while the Department of Vocational Training only adopted the budget reform in 2007. Burn (2008, p. 30) mentions a related reason for the delay, namely that ministries (who had already been involved earlier in the budget reform) were expressing fatigue with the reform and that the Ministry of Economy and Finance

did not want to burden them, which could be perceived as another layer of complication. The Third Progress Report (2006, p. 22) also mentions that “Staff of the Ministry of Finance had difficulty sustaining the implementation pace of the workplan due to competing priorities relating to the budget cycle process. This delay reflects the time investment involved in work on gender-responsive budgeting. **Tasks related to ensuring gender-responsiveness of processes and formats are not yet internalised within the Ministry and therefore present additional strain on staff time and capacities**”. This situation was confirmed in the interviews conducted during this evaluation and points to some serious problems of institutionalization of GRB work in government administrations, which was difficult for UNIFEM staff to influence.

Most importantly, there seem to have been few institutional incentives for the relevant Morocco Country Office staff to engage in systematic **organizational learning**. Learning on GRB took place at the level of individuals or was outsourced to consultants (e.g. with regard to the Knowledge Management modelisation study), but not at the organizational level beyond the writing of the progress reports and adjustment of annual workplans. This is set to improve, with important KM and learning mechanism outputs becoming available in Phase III. With regard to UNIFEM and partners in the Ministry of Finance, there seems to have been a strong sense that Morocco should be considered a “best practice” case to be (unquestioningly?) promoted at the international level (based on the various presentations given at international fora that were reviewed for this evaluation). The associated publicity probably provided an important boost of morale to key stakeholders, but it may also have led to a certain disregard of GRB experiences elsewhere (i.e. implying to Moroccan stakeholders that there is nothing much to learn for them from other country experiences).

Key finding

Organizational learning took place at the level of individuals or was outsourced to consultants (e.g. with regard to the Knowledge Management modelisation study), but this should improve significantly during Phase III.

9. Conclusions

The UNIFEM GRB Programme has successfully engaged with the budget reform process in Morocco and has **produced some significant results** including annual, institutionalised Gender Reports accompanying the Finance Bill (Budget Law) (including sections by 21 ministries/ departments) and progress in making 14 sectoral pilot programmes more gender-responsive. Key factors in this success have been the effective partnership that UNIFEM has forged with the relevant directorates in the Ministry of Economy and Finance and the determination and commitment of the DPEF gender unit.

The **decision to engage with the budget reform was strategically correct** but has constrained the achievement of short-term goals, particularly in effecting concrete changes in budget allocations due to the complexity and slow pace of the reform.

The focus on the Ministry of Economy and Finance was critical in order to ensure that the GRB Programme was anchored to the budget reform process. However, the programme needs to build on this base in order **to gain traction at all levels of the ministry and across sectors**, by higher-level lobbying by UNIFEM or influencing other donor programmes supporting budget reform or the gender strategy to include GRB on their agendas.

The **sector pilots helped to target capacity-building to key sectors**. The next step is to focus more on the Budget Directorate to operationalise GRB work in targeted sectors. For this to happen, the DB would need to share in (some of) the leadership role that was strongly exercised by the DPEF in Phase II. The **lack of adequate information systems and data-collection mechanisms** also needs to be addressed, as these are the prerequisites for tracking the longer-term outcomes and impacts of GRB, as well as situation analyses. Such targeted support to individual departments to develop gender-responsive indicators and M&E systems should take the form of

continuous follow-up instead of periodic workshops.

More explicit linkages between the sectoral pilot work and the Gender Report should be made, and possibilities for enhancing capacity at decentralised levels should be explored.⁶⁹

UNIFEM has successfully started to broker relationships between NGOs and the Ministry of Economy and Finance and Parliament. It needs to take this work forward by **supporting the initiatives of the NGO GRB steering group** established in 2008 and providing **capacity-building support to civil society organizations** involved in monitoring the gender impact of public policies. Similar support and awareness-raising are required for **MPs in general and women MPs** (through the Forum of Women Parliamentarians) and the Finance Commission in particular. This support would also help ensure the MPs' adherence to the passing of a new (GRB-sensitive) Organic Finance Law scheduled for 2011.

UNIFEM and the Ministry of Economy and Finance consider the annual Gender Reports as important advocacy and accountability tools in the hands of NGOs and members of Parliament vis-à-vis the executive branches of government, including measures on EVAW. **A more systematic human rights-based approach** would require that these reports be accessible to a wider variety of NGOs and MPs, both in terms of their intelligibility and timeliness.

The UNIFEM team was aware of relevant actors and processes, and the programme is now making linkages with some important processes, such as the INDH. However, a

⁶⁹ Such work could start with the Ministry of Education and the Ministry of Agriculture. The latter is especially promising given that it benefits from a large part of the grant in the amount of 697.5 million dollars that Morocco received from the Millennium Challenge Account (MCA) in 2007 in support of economic growth and the promotion of employment opportunities in Morocco (including a fisheries programme with an important gender component).

comprehensive situation analysis and mapping of gender programmes at the start of Phase II (and continually updating it throughout) could have enabled more effective linkages with a broader range of actors. Finding ways to influence the ongoing work supported by the EU and the World Bank in the area of budget reform and MTEFs to include the gender dimension would **better leverage UNIFEM's limited resources.**

UNIFEM should aim to strengthen partnerships and coordination by enlarging the steering committee to include a broader range of organizations from civil society, government and the donor community.

Phase II of the GRB programme includes impressive sets of learning mechanisms and KM, most of which are being finalised and whose concrete impacts will therefore mostly be felt during Phase III. The e-learning module currently under development with DAAG should not only be used in Ministry of Finance Training Institute but also **integrated in the curricula of other prestigious public administration institutes.** A training of trainers' component could also be envisaged to strengthen national capacity in the area of GRB. This would address the need for strengthening the communication and dissemination of the GRB Programme's outputs at the national level.

10. Lessons learned

Anchoring the GRB programme in a long-term process of fundamental change (the budget reform) means that programme outcomes cannot be achieved within the time-frame of Phase II. While a more long-term engagement by UNIFEM is needed, it should also be strategically targeted to sectors that have made some progress and acquired some capacity in implementing the main elements of the reform (e.g. staff know about the various types of indicators, and examples of gender-responsive indicators could easily be understood and further developed). This would mean keeping track of the implementation schedules in each department and proposing GRB input at key moments; it would also mean liaising with the World Bank and others when they develop or revise the results-based budgeting manuals to ensure that they are engendered, i.e. there would only be one set of manuals and guide-

lines for staff. While some of these issues are part of the more general problems to do with aid harmonization and coordination, as well as the legal framework (e.g. the new Organic Finance Law), such an approach would try to avoid adding the gender perspective on top of an already complex process of institutional change that may lead to “reform fatigue” and a superficial understanding and application of the GRB concepts and tools.

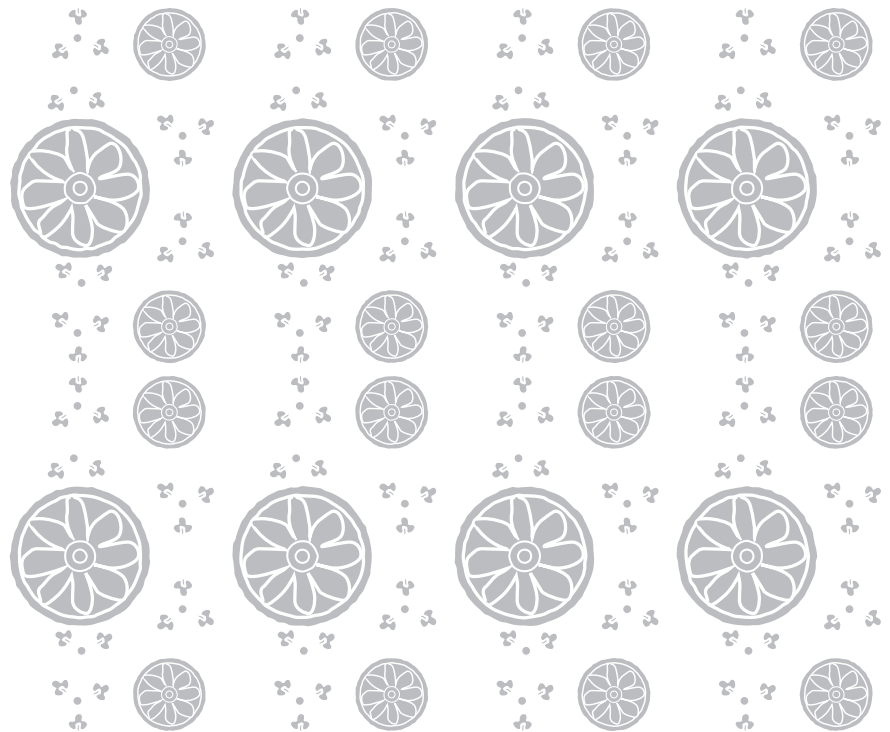
In a national context where accountability and evaluation are not part of the political culture, it may be unavoidable that relations between “accountability partners” such as NGOs and the executive branch of government are at first antagonistic. UNIFEM can play a valuable role in mediating between these crucial stakeholders by using GRB as a common tool or “language”.

11. Recommendations

- 1.** While the capacity-building approach adopted for Phase II was broadly relevant and effective, there is a shared need now to move beyond workshops for capacity-building towards **more targeted technical support** (especially by the Budget Directorate) and building peer learning networks across key sectors to achieve real changes in budget allocations.
- 2.** At the start of Phase III, it would be useful to explicitly address the **Theory of Change** that it is based on to ensure that it is shared and committed to by all relevant stakeholders, including within the UNIFEM team at HQ and in the Morocco office, including accountability actors and other donors.
- 3.** Similarly, it is recommended to map all ongoing gender and budget reform programmes and identify strategic partnerships and cooperation opportunities to **increase UNIFEM's leverage** of limited resources and the impact of its GRB programmes.
- 4.** In order to capitalize on the success of the Morocco programme, it is important to finalize the learning mechanisms and KM components as soon as possible and draw up a dissemination plan to share good practices and lessons learned systematically, both within Morocco and abroad. **Partnerships with other relevant countries should be institutionalised** to maximise gains.

Evaluation Report

UNIFEM's Work on Gender-Responsive Budgeting



Annexes

Annex 1

Terms of Reference for the Corporate Evaluation of the Programme Portfolio UNIFEM's Work on Gender-Responsive Budgeting

1. Background

Gender-responsive budgeting (GRB) has become an internationally acknowledged tool for achieving gender equality. This tool was first pioneered in Australia in 1984, with a federal government assessment of the budget's impact on women. A decade later, the concept was endorsed by the UN's Fourth World Conference on Women and the Beijing Platform for Action in 1995. Presently, more than 90 countries all around the world pursue a variety of GRB initiatives that span civil society, government and international organizations.

Responding to the demand from countries to introduce or institutionalise GRB, the United Nations Development Fund for Women (UNIFEM) contributes extensively to building interest, capacity and commitment to incorporate a gender equality perspective in budgetary processes and practices. Since 2001, UNIFEM has supported GRB initiatives in more than 35 countries and has positioned itself as a leading player in GRB in the UN system.

UNIFEM's global programme, "Strengthening Economic Governance: Applied Gender Analysis to Government Budgets", launched in 2001, provided technical and financial support to gender budget initiatives in Latin America, Africa and Asia-Pacific. The first 4 years of the programme focused on making gender budgeting tools and methodologies available, increasing stakeholders' capacity to advocate and carry out gender budget analysis, improving budgeting and planning processes to enhance gender equality and increasing resource allocations to support gender equality.

The second phase of the programme, implemented in 2005-2008, aimed to ensure that poor women's priorities were adequately reflected in national budgeting processes. Initiatives were put into action in Morocco, Senegal, Mozambique and Ecuador. In these four countries, the programme sought to transform budget execution processes and policies, making them more responsive to principles of gender equality. The programme also aimed to make concrete changes for resource allocation towards women's priorities.

The global programme inspired numerous GRB initiatives, which took shape differently and stretched beyond the scope of the original programme. Currently, UNIFEM's GRB programming consists of a portfolio of cross-regional, thematic, regional and country-level programmes that span across different countries and local communities all over the world.

UNIFEM's GRB initiatives operate on different levels and vary in their objectives, but they are united in their ultimate goal: to contribute to the realization of women's rights and gender equality through changes in budget priorities as well as increased women's participation in budgetary debates and decision-making.

2. Justification and purpose of the evaluation

In order to assess the effectiveness and relevance of UNIFEM's work in key areas, UNIFEM undertakes a number of strategic corporate evaluations every year. Corporate evaluations are independent assessments that analyse UNIFEM's performance and contribution to the critical areas of gender equality and women's empowerment. They are considered strategic because they provide knowledge on policy issues, programmatic approaches or cooperation modalities.

The evaluation of UNIFEM's work on GRB is a corporate evaluation, and it is undertaken as part of the annual evaluation plan of the Evaluation Unit in 2008. The justification for its selection as a corporate evaluation is based on the existing commitment of donors to fund the programme (the Belgium government), its relevance to the UNIFEM Strategic Plan (2008-2011), its potential for generating knowledge on the role of GRB for greater accountability to women and advancement of the gender equality agenda, the size of investment allocated to this area of work in the last years and its geographic coverage.

In particular, the relevance of this evaluation is remarkable considering that UNIFEM's Strategic Plan has placed a specific focus on **increasing the number of budget processes that fully incorporate gender equality**, defining it as one of the key eight outcomes to which the organization aims to contribute by advancing the goal of implementation of national commitments to gender equality and women's empowerment. It is therefore expected that this evaluation will bring significant evidence and understanding of the factors that enable or hinder successful implementation of GRB processes.

This evaluation is an independent external evaluation, which has both summative and formative components. It seeks to be a forward looking and learning exercise, rather than a pure assessment of GRB programming in UNIFEM. The evaluation deploys a theory-driven approach and aims to assess critically what conditions and mechanisms enable or hinder UNIFEM's work in increasing gender equality in budget processes and practices, as well as evaluate UNIFEM's overall approach to GRB programming. The principal objective is to inform and support UNIFEM's strategy on GRB.

The corporate evaluation will be conducted in different stages. **Stage 1** will constitute a preliminary rapid assessment of GRB initiatives that will aim to clarify the scope of evaluation. **Stage 2** will focus on the *Global GRB Programme: Phase II* as a case study and will assess the programme's results at country level. **Stage 3**, building on the findings of the first two stages, will aim to evaluate

the overall appropriateness (effectiveness, relevance and sustainability) of UNIFEM's approach to GRB programming.

The evaluation will have the following objectives:

To assess UNIFEM's GRB thematic strategy and its technical and political effectiveness in promoting gender equality;

To support GRB programming by consolidating and testing the theories of change that underpin UNIFEM's work in this thematic area;

To identify enabling and disabling factors that affect the implementation of GRB Programmes;

To evaluate progress towards GRB programming outcomes and outputs at country level through a case study of the *Global GRB Programme: Phase II*;

To inform UNIFEM's learning on effective strategies, models and practices in promoting gender accountability in budgetary policies and practices;

To support the selected GRB Programmes in their programming and evaluation by updating their theories of change, identifying indicators and providing monitoring tools.

It is expected that the results of the evaluation will be used as significant inputs for:

UNIFEM's thematic strategy, reflection and learning about work on GRB programming;

The design and implementation of the third stage of the Gender-Responsive Budgeting Programme;

Improving the monitoring and evaluation systems of UNIFEM's current GRB Programmes and preparing the impact evaluation of the selected countries.

3. Description of UNIFEM's GRB programming

UNIFEM's GRB programming portfolio supports activities at global, regional, national and local levels to achieve

gender equality through research and capacity-building, policy advocacy, networking and knowledge sharing. The Global GRB Programme supports the development of tools for applied gender analysis of expenditure and revenues for adaptation and utilisation at the country level. It also promotes women's participation in economic fora and economic governance bodies, and it advocates for debate among international institutions on gender and economic challenges. The country-level initiatives for GRB include the examination and analysis of local, national, and sectoral budgets from a gender perspective and study of the gender-differentiated impact of taxation policies and revenue-raising measures. These efforts seek to promote dialogue among civil society, parliamentarians and officials responsible for budget policy formulation and implementation around gender equality, poverty and human development.

UNIFEM's recent GRB initiatives include:

The Gender Responsive Budgeting Programme: Phase I, 2001-2004, and Phase II, 2005-2008 (the Belgian government-funded programme, with a budget of more than 5 million Euro over two phases of the programme);

UNIFEM's Local Level Gender Responsive Budgets Programme: 2003-2006 (funded by the European Commission, provided support of 700,000 Euro to local initiatives in India, Morocco, Uganda and the Philippines);

Gender Equitable Local Development (joint thematic programme with UNCDF, UNIFEM and UNDP launched in 2008; with the budget exceeding US\$6 million);

Application of GRB in the context of Reproductive Health (joint thematic programme with UNFPA; US\$730,000; 2006-present);

GRB and Aid Effectiveness: 2008-2011 (the European Commission-funded thematic programme; Euro 2.61 million);

Engendering Budgets: Making visible women's voluntary contributions to national development in Latin America (joint programme with UNV; US\$365,500; 2005-2007);

Strengthening local democratic governability: Latin American gender responsive budget initiatives (joint programme with AECID; \$1, 400,000; 2006-2009).

Independent regional and country-level programmes, projects and activities that are inspired by cross-regional and thematic programming but as such are not directly funded by these programmes.

4. The Scope of Evaluation: Evaluation Questions

Regarding the geographic scope and time-frame, Stage 1 will do an overall scanning of UNIFEM work in all regions. Stage 2 will focus its analysis on the Gender Responsive Budgeting Programme: Phase II in Ecuador, Morocco, Mozambique and Senegal, covering the time-frame 2005-2008. Stage 3 will have a global perspective and will explore GRB initiatives in different regions, including Latin America, Central Eastern Europe, Africa, Asia and Arab States from 2004 to 2008. It is expected that the final geographic focus of the evaluation for Stage 3 will be defined after preliminary literature and desk reviews and consultations with the programme staff.

The evaluation will address the following key questions:

What approaches does UNIFEM deploy in GRB programming and what underlying assumptions and theories support these programmes?

What are the results of the *Gender Responsive Budgeting Programme: Phase II*? Why and how were these results achieved? What are the good practices, lessons learned and challenges?

What evidence exists to support claims that UNIFEM's GRB programme portfolio is contributing to gender equality and making an impact on the advancement of women's rights?

What key indicators, processes and variables are strategic for tracking and measuring progress in GRB processes?

How do the political, economic, social and institutional contexts affect UNIFEM's GRB work and the achievement of expected results?

What support does UNIFEM provide to its partners working on GRB to achieve results at the country, regional and global levels? To what extent has the national ownership of GRB

initiatives been achieved?

How effective, relevant and potentially sustainable are approaches in GRB programming with a view to recommending future directions?

It is expected that the evaluation team will develop an evaluation matrix, which will relate to the above questions, the areas they refer to, the criteria for evaluating them, the indicators and the means for verification as a tool for the evaluation.

5. Approach to Evaluation

In order to use available resources effectively and to avoid duplication, the corporate evaluation builds on previously planned evaluations as well as the ample research on GRB already conducted by UNIFEM. As noted previously, the evaluation is carried out in two stages, which differ in their geographical scope and time-frame. We propose that these different stages of the evaluation could be combined by deploying a theory-driven approach to evaluation. The different stages of evaluation will inform each other by identifying, testing and mapping the underlying theories and practices, which enable or obstruct transformative change.

We understand a theory-driven approach as an evaluation methodology that focuses on uncovering the underlying assumptions held about how the programme is believed to be working to achieve its outcomes and then testing these assumptions on the ground once they have been made public. Like any planning and evaluation method, the theory-driven evaluations require the stakeholders to be clear on long-term goals, identify measurable indicators of success and formulate actions to achieve goals.

However, its focus on causal relations among resources, activities, outcomes and the context of intervention makes this method particularly suitable for the assessment of complex programmes, such as UNIFEM's GRB programming. The theory-driven approach makes the programme transparent, allowing the stakeholders to see how it is thought to be working from multiple perspectives. It helps to identify critical areas and issues on which the evaluation should focus. Overall, a theory-driven approach by mapping a process of change from beginning to end establishes a blueprint for the work ahead and anticipates its effects, and it reveals what should be evaluated, when and how.

Stage 1: Preliminary desk reviews and consultations

The evaluation will start with a rapid scan of the GRB initiatives in the period 2004-2008 and focus groups with the programme staff to identify the key models and theories of change deployed in GRB programming. This preparatory part of evaluation will aim to assess the evaluability of the GRB Programmes/projects/activities and clarify the focus of overall assessment of GRB strategy, referred to below as Stage 3.

Stage 2: Evaluation of the GRB Programme

This stage will focus on a case study of the *GRB Programme: Phase II* in Ecuador, Morocco, Mozambique and Senegal. Although the former evaluation has been planned as a separate final evaluation, the corporate evaluation will use *the Phase II* as a site for in-depth analysis of the programme theories. During this stage, the key theories of change and their indicators will be constructed and the programme's progress towards its outcomes assessed. The evaluation will be summative and will focus on the results (at the output and outcome levels) as well as on process issues (partnerships and effective management for the achievement of results). Responding to the needs identified by the *GRB Programme: Phase II*, this stage will pay particular attention to the assessment of the effectiveness of GRB implementation strategies used. (For details, please refer to Annex 1, which contains the ToR for the Evaluation of the Gender Responsive Budgeting Programme: Phase II.)

Stage 3: Mapping and assessment of overall UNIFEM's approach to GRB programming

Building on the findings of Stages 1 and 2, the third part will analyse UNIFEM's GRB programming portfolio since 2004 and will aim to assess the validity of UNIFEM's GRB approach based on the results achieved and identify possible constraints. It will involve a comprehensive mapping of UNIFEM's work on GRB and the development of a typology of GRB programmes/projects according to their theories of change. It has to be noted that Stage 2 mostly captures GRB initiatives at the national level, therefore, the theories of change for local and sectoral initiatives in Stage 3 will be constructed drawing on recently conducted evaluations and semi-structured telephone interviews. Depending on the results of initials scanning, a few field visits may be included in this stage of the evaluation. The data analysis will draw connections between GRB programming and UNIFEM's corporate strategy and will assess the coherence and effectiveness of GRB programming.

The third stage of evaluation will have three main purposes:

To assess the extent of UNIFEM's contribution to raising awareness and capacity-building about gender budgets, as well as increasing gender equality in budgetary processes at country, regional and cross-regional levels.

To extract good practices and inform UNIFEM's strategic guidance for future programming on GRB.

To propose a typology of GRB Programmes and develop data capture systems and monitoring tools at a country level for different "types" of programmes/projects. The developed tools will be used to enhance programming by tracking the progress of different "types" of GRB Programmes and projects.

6. Methodology

The GRB programming at UNIFEM constitutes a complex programme and project portfolio aimed at promoting gender equality in budgetary processes at country, regional and cross-regional levels. The proposed evaluation approach will take account of this complexity by combining qualitative and quantitative research methods within a theory-driven approach. The key components

of the evaluation design will include literature and desk reviews, case study and global mapping/systemic review of UNIFEM GRB initiatives.

Desk and literature reviews (Stage 1)

We propose to begin the process of evaluation by developing a framework of project and programme theories. This step will begin with a mini literature review of key academic and grey literature on underlying aspects of the programmes. The grey literature reviewed will include programme documents, reports, reviews and previous evaluations of UNIFEM GRB programmes. Here the evaluators will aim to identify the underlying assumptions (programme theories) that the stakeholders have made about how GRB Programmes are supposed to work. The document analysis will be supported by focus groups and consultation with key programme staff. The desk review will focus on a variety of GRB initiatives, including regional, national, local and thematic programmes, projects and activities. The GRB Programmes will be explored in a broad socio-economic and organizational context.

A case study (Stage 2)

The programme theories will be refined and tested focusing on the in depth-study of the *GRB Programme: Phase II*. Following the literature and desk reviews, theories will be further developed through a series of semi-structured interviews and focus groups with the GRB Programme management staff, regional and country offices and partners. The consultative element of this stage is crucial for building up a consensus about the programme's overall rationale and desired outcomes and, more specifically, how these work (the generative mechanisms). The good practices and their supporting mechanisms will be mapped and grouped according to the specific programme strands. Finally, surveys of beneficiaries and content analysis of budget policy papers will be conducted to assess the effects of the programme. Data from different research sources will be triangulated to increase its validity.

Typology and Overall Assessment (Stage3)

The second stage of corporate evaluation will focus on the analysis of secondary data and telephone interviews to evaluate the effectiveness, relevance and sustainability of UNIFEM's GRB approach. Here the semi-structured telephone interviews conducted with key stakeholders will be an important tool for data collection as the available programme/project documents may not provide enough evidence to map the theories of change and propose data capture and monitoring systems for different "types" of projects. If the evaluators will identify the need, a few country visits may also be conducted.

The proposed approach and methodology have to be considered as flexible guidelines rather than final standards, and the evaluators will have an opportunity to make their inputs and propose changes in the evaluation design. It is expected that the Evaluation Team will further refine the approach and methodology and submit their detailed description in the proposal and Inception Report. In addition, the refined approach and methodology by the Evaluation Team should incorporate Human Rights and Gender Equality perspectives.

The United Nations Evaluation Group is currently preparing a system-wide guidance on how to integrate Human Rights and Gender Equality in evaluation. This evaluation has been selected for piloting the guide, and that will require approximately three additional person days from the Evaluation Team for the initial briefing and review of the draft guide, piloting process and feedback on the guide.

7. Management of the evaluation

This independent evaluation will be managed by the UNIFEM Evaluation Unit. During the evaluation process, it will consult with GRB Programme, Directorate, Geographical and Thematic sections, Subregional offices and key external partners. An advisory panel and a reference group will be constituted in the beginning of the evaluation to guarantee the quality assurance of the study. Coordination in the field including logistical support will be the responsibility of GRB Programme management and relevant Geographical Sections, Regional and Country Offices.

This evaluation is consultative and has a strong learning component. For the preparation of this ToR, an initial identification of key stakeholders at national and regional levels will be conducted in order to analyse their involvement in the evaluation process. The management of the evaluation will ensure that key stakeholders will be consulted.

After the completion of the evaluation, the final stage of the process will take place, including the dissemination strategy for sharing the lessons learned and the management response to the evaluation results. These activities will be managed by the Evaluation Unit in close consultation with the GRB Programme and other relevant units.

The UNIFEM Evaluation Unit may participate in the country missions in collaboration with the evaluation team.

8. Time-frame and products

The evaluation will be conducted between September 2008 and January 2009. Approximately 200 person days will be required for the conduction of this evaluation.

Product / Activity	Estimated dates
Stage 1 Key product – preliminary models and programme theories identified and the scope of Stage 3 defined	
Inception report of the evaluation team, which includes the evaluation methodology and the timing of activities and deliverables.	28 September – 7 October 2008
Summary report of rapid scanning and evaluability assessment, including set criteria for selection of initiatives to be evaluated.	17 October 2008
Stage 2 Key Product – the Evaluation Report for the GRB Programme: Phase II	
Data collection (including field work)	7 October – 15 November 2008
Progress Report of the Field work to UNIFEM's Evaluation Unit and key internal and external stakeholders.	31 October 2008
Power Point presentation on preliminary findings, lessons learned and recommendations.	17 November 2008
Draft full report highlighting key evaluation findings and conclusions, lessons and recommendations. The format of the evaluation report will be agreed with the evaluators.	3 December 2008
Final evaluation report and five-page executive summary	15 December 2008
Stage 3 Final Report for the Corporate Evaluation, which builds on Stage 2 but also has additional components (*would start in parallel with Stage 2)	
Assessment of the overall GRB approach, including the typology of the programmes, and development of monitoring tools.	15 -31 December 2008
Final report on the assessment of overall GRB approach, which builds on the findings of Stage 1.	15 January 2009
Dissemination event/web podcast/video of evaluation results using new media/video/ alternative methods.	17 January 2009

9. Team composition

An international team of consultants supported by local experts and research/technical assistance and the Evaluation Unit will undertake the evaluation. There will be four to six team members with experience linked to evaluation, gender equality and economic policy with specific knowledge of GRB and public financial management systems. There will be one evaluation team member for each country at Stage 1, one of whom will be a team leader. The Evaluation Unit may post the Task Manager of the corporate evaluation as a team member, who will be involved in the conduction of the evaluation.

The composition of the team should reflect substantive evaluation experience in gender and economic policy areas. A team leader should demonstrate capacity for strategic thinking and expertise in global GRB issues. The team’s experience should reflect cross-cultural experience in development. The team also should include national experts.

a. Evaluation Team Leader – International Consultant

At least a master’s degree; PhD preferred, in any social science.
10 years of working experience in evaluation and at least 5 in evaluation of development programmes. Experience in evaluation of large programmes involving multi-countries and theory-driven evaluations.
Proven experience as evaluation team leader with ability to lead and work with other evaluation experts.
5 years of experience and background on gender equality and economic policy with specific knowledge of GRB and public financial management systems and public sector reform.
Experience in working with multi-stakeholders essential: governments, CSOs and the UN/multilateral/bilateral institutions. Experience in participatory approach is an asset. Facilitation skills and ability to manage diversity of views in different cultural contexts.
Experience in capacity development essential.

Familiarity with any of the specific countries covered by the programme is an asset.
Ability to produce well-written reports demonstrating analytical ability and communication skill.
Ability to work with the organization commissioning the evaluation and with other evaluation stakeholders to ensure that a high-quality product is delivered on a timely basis.
Fluent in English.

The Evaluation Team leader will be responsible for coordinating the evaluation as a whole, the evaluation team, the work plan and the presentation of the different evaluation products.

a. Evaluation Team Members – Regional/National Consultants

At least a master’s degree related to any of the social sciences.
At least 5 years experience in evaluation.
Familiarity with Morocco, Senegal, Ecuador and Mozambique is essential. Preference to be given to consultants familiar with most number of countries covered by the programme to be evaluated.
Good understanding of gender equality and economic policy. At least 5 years experience in this field. Familiarity with GRB is an asset.
Experience in working with at least two of the following types of stakeholders: government, civil society and multilateral institution.
Good analytical ability and drafting skills.
Ability to work with a team.
Fluent in English. Working knowledge of an additional language used in one of the countries essential (Spanish/ French), in two or more countries is an asset.

10. Ethical code of conduct for the evaluation

It is expected that the evaluators will respect the ethical code of conduct of the United Nations Evaluation Group (UNEG). These are:

Independence: Evaluators shall ensure that independence of judgment is maintained and that evaluation findings and recommendations are independently presented.

Impartiality: Evaluators shall operate in an impartial and unbiased manner and give a balanced presentation of strengths and weaknesses of the policy, program, project or organisational unit being evaluated.

Conflict of Interest: Evaluators are required to disclose in writing any past experience that may give rise to a potential conflict of interest and to deal honestly in resolving any conflict of interest which may arise.

Honesty and Integrity: Evaluators shall show honesty and integrity in their own behaviour, negotiating honestly the evaluation costs, tasks, limitations and scope of results likely to be obtained, while accurately presenting their procedures, data and findings and highlighting any limitations or uncertainties of interpretation within the evaluation.

Competence: Evaluators shall accurately represent their level of skills and knowledge and work only within the limits of their professional training and abilities in evaluation, declining assignments for which they do not have the skills and experience to complete successfully.

Accountability: Evaluators are accountable for the completion of the agreed evaluation deliverables within the time-frame and budget agreed while operating in a cost-effective manner.

Obligations to Participants: Evaluators shall respect and protect the rights and welfare of human subjects and communities in accordance with the UN Universal Declaration of Human Rights and other human rights conventions. Evaluators shall respect differences in culture, local customs, religious beliefs and practices, personal interaction, gender roles, disability, age and ethnicity while using evaluation instruments appropriate to the cultural setting. Evaluators shall ensure prospective participants are treated as autonomous agents, free to choose whether to participate in the evaluation, while ensuring that the relatively powerless are represented.

Confidentiality: Evaluators shall respect people's right to provide information in confidence and make participants aware of the scope and limits of confidentiality while ensuring that sensitive information cannot be traced to its source.

Avoidance of Harm: Evaluators shall act to minimize risks and harms to, and burdens on, those participating in the evaluation without compromising the integrity of the evaluation findings.

Accuracy, Completeness and Reliability: Evaluators have an obligation to ensure that evaluation reports and presentations are accurate, complete and reliable. Evaluators shall explicitly justify judgments, findings and conclusions and show their underlying rationale so that stakeholders are in a position to assess them.

Transparency: Evaluators shall clearly communicate to stakeholders the purpose of the evaluation, the criteria applied and the intended use of findings. Evaluators shall ensure that stakeholders have a say in shaping the evaluation and shall ensure that all documentation is readily available to and understood by stakeholders.

Omissions and wrong-doing: Where evaluators find evidence of wrong-doing or unethical conduct, they are obliged to report it to the proper oversight authority.

Annex 2A

Evaluation Matrix

The following Evaluation Matrix provides more detail for the Summary Evaluation Matrix in section 2.1.3 of this report. It is organized by the five fields of investigation (focusing on results, contextualising the analysis etc.) and correlates the objective of each area of investigation with

the evaluation criteria (efficiency, effectiveness etc.), questions from the ToRs and evaluation components (process evaluation, outcomes assessment etc.). The Matrix also includes indicators and means of verification for each objective of investigation.

Field of investigation: Focusing on results		
Evaluation criteria: efficiency (were the things done right?), effectiveness (were the right things done?), sustainability (effectiveness, degree of client satisfaction, partnership and ownership)		
Evaluation questions from ToRs: What are the results of the <i>GRB Programme: Phase II</i> ? Why and how were these results achieved? What are the good practices, lessons learned and challenges? What evidence exists to support claims that UNIFEM's GRB Programme portfolio is contributing to gender equality and making an impact on the advancement of women's rights? What key indicators, processes and variables are strategic for tracking and measuring progress in GRB processes in the short, medium and long-term?		
Capacity-building approaches (individual, organizational and institutional)	Indicator	Means of verification
Objective of this area of investigation: to assess what capacity-building has been designed, delivered and monitored <hr/> Evaluation criterion: Efficiency Evaluation component: Process evaluation	Range of capacity-building approaches used Extent of changes through time in capacity-building approaches used (target groups, content, timing etc.) Amount and type of information UNIFEM has available about capacity-building approaches used	Programme documentation Interviews with key informants Focus group meeting Web-based survey Literature review GRB categorization and mapping
Objective of this area of investigation: to assess how capacity-building has made change possible <hr/> Evaluation criterion: Effectiveness Evaluation component: Outcomes assessment	Extent of GRB activities undertaken by different actors Degree of clarity in explanations of approaches used	Verbal or documented examples of change cited by GRB actors
Objective of this area of investigation: to assess whether capacity-building will continue independently from UNIFEM <hr/> Evaluation criterion: Sustainability Evaluation component: Outcomes assessment	Number of GRB capacity-building activities underway or planned without direct, current UNIFEM involvement Number of GRB capacity-building activities incorporated into mainstream government training	Verbal or documented examples cited by GRB actors

Sectoral piloting approaches	Indicator	Means of verification
<p>Objective of this area of investigation: <i>to assess what approaches UNIFEM has adopted in supporting sectoral pilots</i></p> <hr/> <p>Evaluation criterion: Efficiency Evaluation component: Process evaluation</p>	<p>Range, timing, selection and focus of sectoral piloting approaches used Extent of changes through time in sectoral piloting approaches used</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey Literature review GRB categorization and mapping</p>
<p>Objective of this area of investigation: <i>to assess how sectoral piloting has made change possible</i></p> <hr/> <p>Evaluation criterion: Effectiveness Evaluation component: Outcomes assessment</p>	<p>Amount and type of information UNIFEM has available about sectoral piloting approaches used Types of gender-responsive changes in sector planning and budgeting mechanisms and allocations Degree of clarity in explanations of approaches used</p>	<p>Verbal or documented examples of change cited by actors in the pilot sector or influencing the pilot sector</p>
<p>Objective of this area of investigation: <i>to assess whether sectoral pilots has resulted in long-term changes in relation to service providers and/or users</i></p> <hr/> <p>Evaluation criterion: Sustainability Evaluation component: Outcomes assessment</p>	<p>Range of examples of long-term changes in the provision or use of sectoral services</p>	<p>Verbal or documented examples of long-term change cited by actors in the pilot sector or influencing the pilot sector</p>
Evidence-based advocacy	Indicator	Means of verification
<p>Objective of this area of investigation: <i>to assess what advocacy initiatives have been undertaken related to GRB</i></p> <hr/> <p>Evaluation criterion: Efficiency Evaluation component: Process evaluation</p>	<p>Range of advocacy initiatives undertaken Extent of changes through time in advocacy approach, target and/or messages used Amount and type of information UNIFEM has available about evidence-based advocacy approaches used</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey Literature review GRB categorization and mapping</p>
<p>Objective of this area of investigation: <i>to assess how evidence-based advocacy has made change possible</i></p> <hr/> <p>Evaluation criterion: Effectiveness Evaluation component: Outcomes assessment</p>	<p>Range of evidence-based GRB advocacy actions undertaken Number of examples of use of evidence from GRB advocacy in policy and budgeting processes Degree of clarity in explanations of approaches used</p>	<p>Verbal or documented examples of long-term change cited by actors engaged with GRB initiatives</p>
<p>Objective of this area of investigation: to assess whether evidence-based advocacy has contributed to long-term changes in relation to achieving gender equality and/or fulfilling women's rights</p> <p>Evaluation criterion: Sustainability Evaluation component: Outcomes assessment</p>	<p>Range of examples of long-term gender-responsive changes in content of policy and budgeting mechanisms and/or changes in actors involved (gender machinery, sectors, central planning and finance ministries, civil society, etc.)</p>	<p>Verbal or documented examples of long-term change cited by actors engaged with GRB initiatives</p>

UNIFEM's institutional and organizational arrangements	Indicator	Means of verification
<p>Objective of this area of investigation: to assess UNIFEM's organizational, planning, monitoring and evaluation (PM&E) and communication arrangements and financial performance in its GRB programming</p> <hr/> <p>Evaluation criterion: Efficiency Evaluation component: Process evaluation</p>	<p>Degree of clarity and consistency in institutional and organizational arrangements for GRB programming Extent of changes through time in institutional and organizational arrangements for GRB programming Number of planned GRB activities implemented Proportion of planned GRB programme budget actually spent annually</p>	<p>Programme documentation Interviews with key informants</p>
<p>Objective of this area of investigation: to assess UNIFEM's organizational learning in relation to GRB programming</p> <hr/> <p>Evaluation criterion: Effectiveness Evaluation component: Outcomes assessment</p>	<p>Range of examples of organizational learning cited by UNIFEM staff</p>	<p>Verbal or documented examples of learning cited by UNIFEM staff</p>

Field of investigation: Contextualising the analysis

Evaluation criteria: relevance, sustainability (effectiveness, degree of client satisfaction, partnership and ownership)

Evaluation questions from ToRs: How do the political, economic, social and institutional contexts affect UNIFEM's GRB work and the achievement of expected results? How effective, relevant and potentially sustainable are approaches in GRB programming with a view to recommending future directions?

Situation analysis (as part of programme design)	Indicator	Means of verification
<p>Objective of this area of investigation: to assess UNIFEM's understanding of the environment in which GRB programming was intended to occur</p> <hr/> <p>Evaluation criterion: Relevance Evaluation component: Needs assessment</p>	<p>Degree of completeness of situation analysis documentation Degree of completeness of UNIFEM staff's understanding of the contextual factors important in determining stakeholders' needs and priorities and/or strategy adopted, focus and outcomes of GRB programming</p>	<p>Programme documentation Interviews with key informants</p>
Changes in external context during life cycle of the project	Indicator	Means of verification
<p>Objective of this area of investigation: to assess UNIFEM's ongoing understanding of the environment in which GRB programming was taking place</p> <hr/> <p>Evaluation criterion: Sustainability Evaluation component: Assessment of external factors</p>	<p>Degree of completeness of project reporting with regard to changes in the external context during the implementation of GRB programmes Degree of completeness of UNIFEM staffs' understanding of which contextual factors are important in determining stakeholders' needs and priorities and how changes in external context influence GRB programme strategies and expected outcomes</p>	<p>Programme documentation Interviews with key informants</p>

Field of investigation: Ensuring partnership and ownership

Evaluation criteria: Client satisfaction, sustainability (effectiveness, degree of client satisfaction, partnership and ownership)

Evaluation questions from ToRs: What support does UNIFEM provide to its partners working on GRB to achieve results at the country, regional and global levels? To what extent has the national ownership of GRB initiatives been achieved? How effective, relevant and potentially sustainable are approaches in GRB programming with a view to recommending future directions?

Ownership	Indicator	Means of verification
<p>Objective of this area of investigation: to assess what GRB stakeholders say about UNIFEM's approach to GRB programming</p> <hr/> <p>Evaluation criterion: Client satisfaction Evaluation component: Process assessment</p>	<p>Range of GRB stakeholders with opinions about UNIFEM's approach to GRB programming Degree of positive comment on UNIFEM's approach to GRB programming</p>	<p>Interviews with key informants Focus group meeting</p>
<p>Objective of this area of investigation: to assess what actions have been put in place/are planned to continue GRB programming beyond UNIFEM's involvement</p> <hr/> <p>Evaluation criterion: Sustainability Evaluation component: Outcomes assessment</p>	<p>Number of examples of GRB activities/systems in place/planned without direct UNIFEM technical or financial support</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey</p>
Partnership	Indicator	Means of verification
<p>Objective of this area of investigation: to assess what actors involved in design, delivery or assessment of UNIFEM's GRB programming say about UNIFEM's approach</p> <hr/> <p>Evaluation criterion: Client satisfaction Evaluation component: Process assessment</p>	<p>Degree of informed comment on UNIFEM's approach to GRB programming from actors UNIFEM identifies as partners</p>	<p>Interviews with key informants Focus group meeting</p>
<p>Objective of this area of investigation: to assess UNIFEM's approach to selecting and supporting partners</p> <hr/> <p>Evaluation criterion: Sustainability Evaluation component: Outcomes assessment</p>	<p>Number of examples of partnerships that UNIFEM identify as successful Number of examples of partnerships that partners identify as successful Degree of clarity and consistency in (a) UNIFEM's and (b) partner's description of the partnership and most important elements of the partnership</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey</p>

Field of investigation: Identifying good practice		
Evaluation criteria: Efficiency, effectiveness, client satisfaction		
Evaluation questions from ToRs: What key indicators, processes and variables are strategic for tracking and measuring progress in GRB processes? How can the experiences of GRB programming provide recommendations for the future direction of GRB?		
Developing good practice	Indicator	Means of verification
<p>Objective of this area of investigation: <i>to identify the features of practice that stakeholders identify as promising or good</i></p> <hr/> <p>Evaluation criteria: Efficiency, client satisfaction Evaluation component: Process assessment</p>	<p>Number of examples of promising or good practice identified by UNIFEM staff and other GRB stakeholders Degree of clarity in stakeholders' description and analysis of the practices identified as promising or good</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey Literature review GRB categorization and mapping</p>
Developing good practice	Indicator	Means of verification
<p>Objective of this area of investigation: <i>to assess mechanisms for sharing good practice</i></p> <hr/> <p>Evaluation criterion: Effectiveness Evaluation component: Overall theory of change</p>	<p>Number of mechanisms for sharing documented information on GRB programming Number of mechanisms in place for putting GRB actors in touch with each other for collaboration, learning and knowledge sharing</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey Literature review GRB categorization and mapping</p>

Field of investigation: Understanding the programmatic concept		
Evaluation criteria: Effectiveness, replicability		
Evaluation questions from ToRs: What approaches does UNIFEM deploy in GRB programming and what underlying assumptions and theories support these programmes? How well specified were the objectives? How well linked were the objectives and the strategies adopted?		
Programmatic logic	Indicator	Means of verification
<p>Objective of this area of investigation: <i>to assess whether there is an articulated and shared understanding of why and how GRB programming contributes to gender equality and women's empowerment</i></p> <hr/> <p>Evaluation criteria: Effectiveness, replicability Evaluation component: Outcomes assessment Developing good practice</p>	<p>Extent to which UNIFEM staff and other GRB stakeholders can articulate a programmatic logic for GRB Range of opinions about why and how GRB programming contributes to gender equality and women's empowerment Degree of clarity and consistency with which UNIFEM staff and GRB partners describe the relationship between programme logic, activities, expected outcomes and indicators</p>	<p>Programme documentation Interviews with key informants Focus group meeting Web-based survey Literature review GRB categorization and mapping</p>

Annex 2B

Interview Record Form

This form should be used to record key conclusions and other relevant data from each semi-structured interview with a GRB stakeholder

<p>Name of person interviewed: Job title: Institution: Name of interviewer: Date of interview:</p>
<p>1) Field of investigation: Focusing on results</p> <p>Evaluation criteria: efficiency (were the things done right?), effectiveness (were the right things done?), sustainability (effectiveness, degree of client satisfaction, partnership and ownership)</p> <p>1.1) Capacity-building approaches (individual, organizational, institutional)</p> <p><i>Assessment of what capacity-building has been designed, delivered and monitored</i> <i>Key conclusions and other relevant data</i></p>
<p><i>Assessment of how capacity-building has made change possible</i> <i>Key conclusions and other relevant data</i></p>
<p><i>Assessment of whether capacity-building will continue independently from UNIFEM</i> <i>Key conclusions and other relevant data</i></p>
<p>1.2) Sectoral piloting approaches</p> <p><i>Assessment of what approaches UNIFEM has adopted in supporting sectoral pilots</i> <i>Key conclusions and other relevant data</i></p>
<p><i>Assessment of how sectoral piloting has made change possible</i> <i>Key conclusions and other relevant data</i></p>

Assessment of whether sectoral pilots has resulted in long-term changes in relation to service providers and/or users
Key conclusions and other relevant data

1.3) Evidence-based advocacy

Assessment of what advocacy initiatives have been undertaken related to GRB

Key conclusions and other relevant data

Assessment of how evidence-based advocacy has made change possible

Key conclusions and other relevant data

Assessment of whether evidence-based advocacy has contributed to long-term changes in relation to achieving gender equality and/or fulfilling women's rights

Key conclusions and other relevant data

1.4) UNIFEM's institutional and organizational arrangements

Assessment of UNIFEM's organizational, planning, monitoring and evaluation (PM&E) and communication arrangements and financial performance in its GRB programming

Key conclusions and other relevant data

Assessment of UNIFEM's organizational learning in relation to GRB programming

Key conclusions and other relevant data

2) Field of investigation: Contextualising the analysis

Evaluation criteria: relevance, sustainability(effectiveness, degree of client satisfaction, partnership and ownership)

2.1) Situation analysis (as part of programme design)

Assessment of UNIFEM's understanding of the environment in which GRB programming was intended to occur

Key conclusions and other relevant data

2.2) Changes in external context during life cycle of the project

Assessment of UNIFEM's ongoing understanding of the environment in which GRB programming was taking place

Key conclusions and other relevant data

3) Field of investigation: Ensuring partnership and ownership

Evaluation criteria: client satisfaction, sustainability(effectiveness, degree of client satisfaction, partnership and ownership)

3.1) Ownership

Assessment of what GRB stakeholders say about UNIFEM's approach to GRB programming

Key conclusions and other relevant data

Assessment of what actions have been put in place/are planned to continue GRB programming beyond UNIFEM's involvement

Key conclusions and other relevant data

3.2) Partnership

Assessment of what actors involved in design, delivery or assessment of UNIFEM's GRB programming say about UNIFEM's approach

Key conclusions and other relevant data

Assessment of UNIFEM's approach to selecting and supporting partners

Key conclusions and other relevant data

4) Field of investigation: Identifying good practice

Evaluation criteria: efficiency, effectiveness, client satisfaction

4.1) Developing good practice

Identification of the features of practice that stakeholders identify as promising or good

Key conclusions and other relevant data

4.2) Sharing good practice

Assessment of mechanisms for sharing good practice

Key conclusions and other relevant data

5) Field of investigation: Understanding the programmatic concept

Evaluation criteria: effectiveness, replicability

5.1) Programmatic logic

Assessment of whether there is an articulated and shared understanding of why and how GRB programming contributes to gender equality and women's empowerment

Key conclusions and other relevant data

Annex 2C

Evaluation Questions

The following sets of questions are organized following the format of the Evaluation Matrix. Questions are provided for each of the five fields of investigation (focusing on results, contextualising the analysis etc.). Within each field of investigation, questions are provided for the different evaluation components (process evaluation, outcomes assessment etc.). The objective of each area of questioning is identified in the Evaluation Matrix. The evaluation criteria (efficiency, effectiveness etc.) that will be used to assess the various areas of GRB programming are also identified. Information should be gathered that will enable reporting against these evaluation criteria.

When interviewing different types of key informants and structuring focus group meetings, a selection of a limited number of questions should be made from possible options provided below. It may not be possible to cover all five fields of investigation in every interview. However, questions should be selected to cover a cross-section of the different fields of investigation.

Indicative evaluation questions are listed below:

1) Field of investigation: Focusing on results

1.1a) Capacity-building approaches – process evaluation

Objective of this area of investigation: *to assess what capacity-building has been designed, delivered and monitored*

Evaluation criterion: efficiency

How has the content of training changed throughout the project? What changes have been made in selecting who is trained? What training tools and materials have been developed? Who decided and how have these changed throughout the life cycle of the programme?

What systems were in place to assess the results of training (immediate or follow-up)? How good was record keeping about who has been trained? How has this information been used?

What do participants remember about the content of any training they received? To what extent was the training appropriate to the scope of the work of those trained and to their capacity? To what extent was the timing of training appropriate?

How has technical assistance (TA) been used for capacity-building? Who decided about what TA was required and who provided TA? Who received it? What systems were in place to assess TA?

What do stakeholders feel about the quality and the content of the capacity-building activities? (tools, training, advice)

Have other capacity-building approaches been used, such as exchange visits, job swaps and secondments? Who decided about approaches? Who was selected and how were they selected for capacity building? What systems were in place to assess these capacity-building approaches?

What kind of documentation related to capacity-building did the programme produce? Who decided what was produced? How was the documentation disseminated and used? By whom? To what extent do partners/stakeholders assess the documentation to be useful and helpful? Where do stakeholders feel that there are gaps in documentation?

In what ways has capacity-building focused on individuals (human resource development), organizational strengthening (equipment, working spaces etc.) and institutional strengthening (systems, procedures, mechanisms guiding or controlling work etc.)? What has been the weighting between human resource development/organizational/institutional capacity developments? Who decided?

1.1b) Capacity-building approaches – outcomes assessment

Objective of this area of investigation: *to assess how capacity-building has made change possible*

Evaluation criterion: effectiveness

How have those who participated in training applied their knowledge? List specific examples related to:

- GRB tools for budget analysis,
- national or sectoral planning mechanisms,
- sex-disaggregated data.

Provide detail of changes through time, actors involved, learning and gather documentary evidence (budget tools, national or sectoral planning documents etc.).

To what extent has the capacity of the Ministry of Finance, Ministry of Planning and of sector ministries on GRB been enhanced by the programme? What are they able to do now that they weren't able to do before? How have their attitudes and knowledge changed? What are the examples that demonstrate this change?

To what extent has the programme strengthened the capacity of women's rights advocates in the budgeting process? What specific skills were introduced for advocacy work? What are they able to do now that they weren't able to do before? How have their attitudes and knowledge changed? What are the examples that demonstrate this change?

Objective of this area of investigation: *to assess whether capacity-building will continue independently from UNIFEM*

Evaluation criterion: sustainability

To what extent has there been a change in availability of expertise on GRB at the country level? How much is this due to UNIFEM-supported GRB work?

What evidence is there that capacity-building initiatives have continued or been extended to other areas without requiring ongoing, direct UNIFEM inputs? List examples

1.2a) Sectoral piloting approaches – process evaluation

Objective of this area of investigation: *to assess what approaches UNIFEM has adopted in supporting sectoral pilots*

Evaluation criterion: efficiency

How were sectoral pilots identified and how has the focus of or actors involved in sectoral pilots changed throughout the programme? Who decided and what caused these changes?

What were the main approaches used for achieving change in the sector? Training? Technical assistance?

Which systems/mechanisms within the sector were addressed in the pilot? To what extent were planned changes achieved?

What staff continuity/changes have there been relevant to the pilot? How have these affected the pilot?

What institutional continuity/changes have there been relevant to the pilot (e.g. change in where departments are located in government structure, change in ministry structures etc.)? How have these affected the pilot?

What systems were in place to assess progress in the sectoral pilot? How has information on progress been used?

What kind of documentation related to sectoral pilot approaches did the programme produce? How was the documentation disseminated and used? By whom? To what extent do partners/stakeholders assess the documentation to be useful and helpful? Where do stakeholders feel that there are gaps in documentation?

1.2b) Sectoral piloting approaches – outcomes assessment

Objective of this area of investigation: *to assess how sectoral piloting has made change possible*

Evaluation criterion: effectiveness

To what extent have the objectives of the pilot been achieved? What have been the obstacles?

What specific changes in sector planning and budgeting mechanisms and/or content have taken place over the life cycle of the programme? In what ways can changes be attributed to UNIFEM supported actions?

Which actors (departments, individuals) have changed their ways of working and/or ideas on priorities over the life cycle of the programme? In what ways can changes be attributed to UNIFEM supported actions?

Objective of this area of investigation: *to assess whether sectoral pilots result in long-term changes in relation to service providers and/or users*

Evaluation criterion: sustainability

Is it possible to identify any current or likely future changes in the lives of the intended target groups (beneficiaries) of the sector that have/will result from the pilot? What do actors involved in implementing the pilot identify as the long-term changes they think the pilot will bring?

1.3a) Evidence-based advocacy – process evaluation

Objective of this area of investigation: *to assess what advocacy initiatives have been undertaken related to GRB*

Evaluation criterion: efficiency

What have been the key advocacy messages promoted in the programme? What have been the target audiences/systems/tools? How were these identified? How have these changed throughout the life cycle of the programme?

What types and sources of evidence have been used as a basis for advocacy? How have these been developed? How have they been used? What have been the limitations of the evidence base (content and/or format and /or timing)?

Which actors were identified as advocates? How has this changed throughout the life cycle of the programme? Why have changes been made?

What kind of documentation related to evidence-based advocacy approaches did the programme produce? Who decided what was produced? How was the documentation disseminated and used? By whom? To what extent do partners/stakeholders assess the documentation to be useful and helpful? Where do stakeholders feel that there are gaps in documentation?

1.3b) Evidence-based advocacy – outcomes assessment

Objective of this area of investigation: *to assess how evidence-based advocacy has made change possible*

Evaluation criterion: effectiveness

What changes have resulted in the systems and tools used in the planning and budgeting cycle and/or in the content of plans and budgets (sectoral, national) as a result of evidence-based advocacy? What evidence is there of these changes?

What changes have resulted in the attitudes and priorities of target audiences for advocacy? Give specific examples.

What do the actors identified as advocates see as the successes and limitations of their advocacy? Give specific examples.

What kind of documentation related to advocacy did the programme produce? Who decided what was produced? How was the documentation disseminated and used? By whom? To what extent do partners/stakeholders assess the tools to be useful and helpful? Where do stakeholders feel that there are gaps in documentation?

Objective of this area of investigation: *to assess whether evidence-based advocacy has contributed to long-term changes in relation to achieving gender equality and/or fulfilling women's rights*

Evaluation criterion: sustainability

Have the actors identified as advocates carried out further advocacy not specifically as part of the UNIFEM programme? Have they used evidence? Have they achieved the changes they wanted?

1.4a) UNIFEM's institutional and organisational arrangements – process evaluation

Objective of this area of investigation: *to assess UNIFEM's organisational, planning, monitoring and evaluation (PM&E) and communication arrangements and financial performance in its GRB programming*

Evaluation criterion: efficiency

What have UNIFEM's organizational arrangements been for the GRB Programme? How have these changed throughout the life cycle of the programme and who decided? What effect has this had on the operation of the GRB Programme? Has UNIFEM ensured adequate human, financial and technical resources for the programme?

What are the systems and processes for monitoring, tracking and evaluating programme results and indicators (e.g. log frame, M&E mechanism, reporting mechanism)? What monitoring activities have been undertaken throughout the lifetime of the programme and by whom (e.g. regional office monitoring missions, donor monitoring missions, strategic planning reviews)? To what extent are the tracking mechanisms and the indicators developed by the programme appropriate for measuring progress and change? (Explore differences between systems and tools produced by HQ and the country level.)

To what extent have the findings of the Mid-term reviews and regular progress reports contributed to learning? Can you give examples demonstrating how those were incorporated in the programme?

How has the communication/information flow between country office and HQ functioned (e.g. timeliness of responses and feedback, relevance of feedback, clarity of communications)? What issues/challenges exist and why?

To what extent are the delivery rates in accordance with the original programme work plan? What was the annual budget for UNIFEM's GRB Programme in the country? The annual spend?

1.4b) UNIFEM's institutional and organizational arrangements – outcomes assessment

Objective of this area of investigation: *to assess UNIFEM's organizational learning in relation to GRB programming*

Evaluation criterion: effectiveness

To what extent have UNIFEM country offices/staff benefited from learning from other country experiences?

To what extent have M&E systems and processes contributed to the programme learning?

2) Field of investigation: Contextualising the analysis

2.1) Situation analysis (as part of programme design) - needs assessment

Objective of this area of investigation: *to assess UNIFEM's understanding of the environment in which GRB programming was intended to occur*

Evaluation criterion: relevance

How was the situation and needs analysis undertaken for the GRB intervention? How long did the process take?

What was the basis for choosing sectors for pilot approaches? To what extent was the choice of the sector relevant to women's needs in the country?

What other GRB interventions and/or actors were identified by UNIFEM during the design stage of the GRB Programme? In what ways were any other GRB interventions and/or actors identified as being complementary to UNIFEM's GRB programming?

With hindsight, were there any factors in the political, economic and social contexts that should have been taken into account when designing the programme? Provide details.

2.2) Changes in external context during lifecycle of the project - assessment of external factors

Objective of this area of investigation: *to assess UNIFEM's ongoing understanding of the environment in which GRB programming was taking place*

Evaluation criterion: sustainability

Have there been any unexpected changes in the external environment that have significantly affected the functioning or results of the programme? Provide details. Could these have been foreseen beforehand?

What other GRB interventions and/or actors have started up during the life cycle of UNIFEM's GRB Programme? How much information do UNIFEM staff members have about any other GRB interventions/actors?

3) Ensuring partnership and ownership

3.1a) Ownership – process evaluation

Objective of this area of investigation: *to assess what GRB stakeholders say about UNIFEM's approach to GRB programming*

Evaluation criterion: client satisfaction

In UNIFEM's GRB Programme:

- Who was involved in requesting training? Designing training content?
- Who was involved in requesting any technical assistance? In selecting the technical assistants?
- Who was involved in deciding sectoral pilots? In deciding any changes throughout the project?
- Who was involved in deciding any changes made throughout the life cycle of the programme to the advocacy approach/target audiences/advocates? How were these changes agreed?
- Who was involved in analysing the context before the programme began?

How are stakeholders involved in monitoring GRB work?

What comments do stakeholders make about the extent and style of their participation in the programme?

3.1b) Ownership – outcomes assessment

Objective of this area of investigation: *to assess what actions have been put in place/are planned to continue GRB programming beyond UNIFEM's involvement*

Evaluation criterion: sustainability

What examples demonstrate government ownership of changes brought about during the life cycle of the programme?

What specific activities do government, civil society organizations or others say they will continue regardless of whether UNIFEM support continues? How are these activities funded (when UNIFEM support ends)?

To what extent has the programme been successful in positioning GRB work within broader national planning, budgeting and monitoring frameworks (PRSP, budget reform, public sector reform, aid management, decentralization etc.)?

To what extent has the programme been successful in fostering the participation of civil society and women's organizations in national planning and budgeting?

3.2a) Partnership – process evaluation

Objective of this area of investigation: *to assess what actors involved in design, delivery or assessment of UNIFEM's GRB programming say about UNIFEM's approach*

Evaluation criterion: client satisfaction

What approach to partnership has UNIFEM used with government? With civil society organizations? With other actors (e.g. formal MoUs, financial support for commissioned activities or to core activities, continuity of support, transparency and predictability of support)?

How do UNIFEM staff and non-UNIFEM stakeholders each assess UNIFEM's partnership role in terms of providing funding/technical support/supporting advocacy etc.?

3.2b) Partnership – outcomes assessment

Objective of this area of investigation: *to assess UNIFEM's approach to selecting and supporting partners*

Evaluation criterion: sustainability

What were the key factors that determined decisions about partnerships? Which partnerships were particularly successful? Which partners were more difficult to work with? Why?

4) Identifying good practice⁷⁰

4.1) Developing good practice – process evaluation

Objective of this area of investigation: *to identify the features of practice that stakeholders identify as promising or good*

Evaluation criteria: efficiency, client satisfaction

What would you describe as examples of “promising practices” in GRB work in the country (i.e. practices that have been tried and show signs of working)? What are the key features of the initiative that make it likely to be successful? What has been UNIFEM's role? What do other GRB stakeholders say about the initiative?

Are there examples of demonstrated good practices in GRB in the country (i.e. practices that have been tried and have proved to be successful)? What are the key features of the initiative that have made it successful? What has been UNIFEM's role? What do other GRB stakeholders say about the initiative?

Are there examples of replicated good practices in GRB in the country (i.e. practices that have proved to be effective and have been copied elsewhere)? What are the key features of the initiative that have made it successful? What has been UNIFEM's role? What do other GRB stakeholders say about the initiative?

4.2) Sharing good practice – overall theory of change

Objective of this area of investigation: *to assess mechanisms for sharing good practice*

Evaluation criterion: effectiveness

What mechanisms are available (a) within UNIFEM and (b) within countries/regions to connect GRB actors with documented information about GRB good practices?

What mechanisms are available (a) within UNIFEM and (b) within countries/ regions to connect GRB actors with other GRB actors for collaboration, learning and knowledge sharing about GRB good practices?

5) Understanding the programmatic concept

5.1) Programmatic logic – Overall theory of change

Objective of this area of investigation: *to assess whether there is an articulated and shared understanding of why and how GRB programming contributes to gender equality and women's empowerment*

Evaluation criteria: Effectiveness, replicability

What is your definition of GRB?

What is the objective of the GRB Programme? How was the objective selected and who decided?

What are the different components of the GRB Programme and how are they related, conceptually and institutionally? How does each component contribute to the programme outcomes in the short, medium, and long-term?

To what extent have the goal posts of the programme changed from Phases I, II and III? Why?

How does GRB contribute to UNIFEM's former/current strategic objectives? What are the arguments that achievements in GRB at local, regional and national levels lead to increased gender equality and/or greater realization of women's rights?

⁷⁰ For more on good practice in good practices, see Identifying and Sharing Good Practices, Asian Development Bank Knowledge Solutions Number 14, November 2008 (filed on evaluation team's humyo.com site in evaluation guidance folder).

What are the arguments that link GRB programming to long-term impacts on gender equality and women's empowerment? Long-term impacts may include (i) increasing access and control by women over productive assets (land, capital/credit, technology, skills), (ii) increasing access by women to decent work, (iii) increasing access by women to basic and appropriate services that support well-being and quality of life and (iv) increasing voice and participation in decision-making on government spending, especially for women and girls?

Can you give examples of a "model" of GRB being replicated elsewhere? What are the features that characterise the model?

Annex 2D

Framework for Country Contextual Analysis

The evaluation team will compile a country contextual analysis for each of the countries to be assessed (Ecuador, Morocco, Mozambique and Senegal). This will follow a semi-standardised format to facilitate comparability in analysis of the effects of different country contexts on UNIFEM's GRB portfolio.

The consultants will draw on data from documentation provided by UNIFEM and on other sources as necessary. The consultants will note when data were available from UNIFEM-provided sources and when other sources were used.

The contextual analysis in Stage 1 of the Corporate Evaluation of UNIFEM's GRB portfolio will be carried out as a desk study. The consultants will aim to provide a country contextual analysis that is as complete as possible. However, it may not be possible to respond to all the following questions for every country. Where no data are available, this will be noted. Further data will be gathered in Stage 2 fieldwork.

	Question	Possible data source	UNIFEM data source	Non-UNIFEM data source
Global conventions and commitments				
MDGs	What progress has the country made in reaching MDG Goal 1 (halving poverty by 2015) and MDG 3 (gender equality)?	MDG progress report (provide sex-disaggregated data)		
	What progress has the country made on MDG health-related goals (maternal mortality, child mortality)?	MDG progress report (provide sex-disaggregated data of child mortality)		
	What progress has the country made on MDG education related goals and on adult literacy?	MDG progress report (provide sex-disaggregated data)		
CEDAW	Is the country a signatory to CEDAW? Does the country have an established reporting mechanism? Has the country produced reports?	If CEDAW report available, provide brief summary of key information. If not, provide a summary of situation on violence against women (VAW) and efforts to eliminate this (EVAW)		
Beijing Platform for Action	Has the country engaged with the BPFA or Beijing + 10 processes? In what ways has women's political participation and representation been enabled?	UN system in country or web search		

	Question	Possible data source	UNIFEM data source	Non-UNIFEM data source
Socio economic context				
Poverty and well-being	What are national rates of poverty and human development? How do these vary in different regions of the country?	Use government source. Note whether poverty data from different sources are contested.		
	Which social groups are excluded from access to resources, decision-making and the general benefits of society? What are the grounds for exclusion (e.g. ethnicity, religious group HIV status etc.)?			
	What sorts of households and family structure do most people live in? What are the variations in poverty and well-being for different household types?			
Economic profile	How do most households sustain their livelihoods? What are the main sources of revenue generation for the country? What is the regional distribution of resources within the country?			
Gender context				
	Women's labour force participation	Labour Force Survey (National statistical office website) Rate (%)		
	Gender Empowerment Measure (GEM)	UN Human Development Report Ratio		
	Single adult headed households	Demographic and Health Survey (DHS) Rate (%) assume all female		
	Migration	Rate (%) sex disaggregated		
	Urbanisation	Rate (%) sex disaggregated		
	Inheritance	Legislation Any sex-disaggregated information		
	Land tenure	Legislation Any sex-disaggregated land ownership/use information		
	Eliminating violence against women	Legislation Information on VAW types and rates of violence		

	Question	Possible data source	UNIFEM data source	Non-UNIFEM data source
Government structures and plans for addressing gender equality				
National poverty reduction plans	What form of national poverty reduction or national development plan is in place? How gender-sensitive is it? Is there an alternative analysis of gender in the plan?	Use PRSP, NDP or other national plan. Use to describe current mechanism and brief history of evolution of poverty /development plans.		
National Women's Machineries (NWM)	What structures are in place to address gender equality?	If national poverty reduction or development plan available, use to describe NWM structures at national and local levels origins and any information on performance / effectiveness		
Government links with civil society organizations	What formal mechanisms exist for government to consult civil society? How are women's representatives included?	PRSP, NDP, aid effectiveness forums (Poverty Observatory etc.). Civil society annual poverty reporting		
National planning and financial management				
Public sector reform	What changes have been made to public sector structures and functioning? How centralised or decentralised /deconcentrated are government structures?	World Bank reports UNCDF (UN Capital Development Fund) reports Other donor reports National government reports (Ministry of Finance, Ministry of Planning)		
Sex-disaggregated data	What progress has been made to support evidence-based decision-making in policy formation?	Check national statistical office website. List available sex-disaggregated data. Describe reforms to improve evidence base for policy-making.		
Public finance management (PFM) reform	What PFM reforms are underway?	Describe budget cycle. Is budget planning annual or multi-year? Describe budget categorization, computerization, national to local budget and reporting mechanisms Transparency of budget information?		
	What characterises the budget?	Provide information on expenditure side of budget: (a) whether national budget is performance related or categorised by inputs only, (b) proportion of budget allocated to recurrent costs/investment costs and (c) proportion of budget allocated at national, provincial and local level. Provide information on national government income – proportion from taxation? From overseas development aid?		

	Question	Possible data source	UNIFEM data source	Non-UNIFEM data source
Sectoral planning and reporting				
Sector planning and budgeting	What sector planning mechanisms are in place? Annual/multi-year/strategic plans. Are there sectors where gender has been highlighted as a priority and how has this played out?	Use government annual reports, donor country strategies and donor reports. Select example sectors		
	How are different sectors positioned in terms of government spending priorities?	Use government annual reports, donor country strategies and donor reports.		
Sector reporting	What annual reporting mechanisms are in place in different sectors?	Use government annual reports, donor country strategies and donor reports. Describe sectoral reporting between government/donors/civil society representatives.		
Legislation, Parliament and accountability				
Key legislation	What legislation is in place that supports gender equality?	Look at anti discrimination / inheritance / land tenure / family law		
	What evidence is there that legislation is implemented?	Annual government reports CEDAW reporting Convention on the Rights of the Child (CRC) reporting		
Parliament	How effective is Parliament? What is the representation of women in the Parliament and how effective are they as representatives?	Donor reports Afrobarometer		
Auditor General	Is there an independent function auditing government performance?	Donor reports Afrobarometer		
Donors/development partners and aid effectiveness agenda				
Donor profile	Which donors provide support? In what form? Which donors support work on gender equality?	Use government annual reports, donor country strategies and donor reports. Describe UN support. Other multilaterals. Key bilaterals		
	What stage has the aid effectiveness agenda reached?	Use OECD-DAC Aid Harmonisation website		
	How donor dependent is the government?	Use government annual reports, donor country strategies, donor reports Describe financial dependence / technical – capacity dependence / political influence		
	What donor involvement is there in GRB?	Use UNIFEM mapping. Check annual country reports by specific donors to their HQs.		

	Question	Possible data source	UNIFEM data source	Non-UNIFEM data source
Civil society				
CSO structures	What national CS networks exist? How effective are they? To what extent are different types of CSOs involved? NGOs? Media organizations? Trades unions? Academic institutions?			
CSO representation	Which social groups do CSOs represent? Which are key women's organizations?	Annual reports from CSO networks		
	In what ways have CSOs engaged with national policy?	Use CSO reporting or national and sectoral reports (e.g. in SWAps). Look for examples of CSO influence on national poverty reduction / national development planning, on sectoral policy-making, and decentralization. Note examples of impact on policy formation, on policy implementation and on monitoring of impact of policy changes		

Annex 3

People Interviewed

Job Title	Institution
Directrice Régionale des Programmes pour l'Afrique du Nord ; Coordonnateur de Programme 'Budgétisation Sensible au Genre' ; Equipe BSG	UNIFEM
Directeur de la DEPF ; Chef de division de l'environnement national et international Chef du Service de l'Impact des Politiques Sociales ; Chef du Service du Rapport Economique et Financier	Direction des Etudes et des Prévisions Financières, Ministère de l'Economie et des Finances
Chef de Service des Publications ; Chef du Service de la formation à distance	Direction des Affaires Administratives et Générales, Ministère de l'Economie et des Finances
Chef de la Division des Secteurs Sociaux	Direction du Budget, Ministère de l'Economie et des Finances
Chargée de programmes Secteurs sociaux ; Chargée de programmes Société civile	Union européenne, Délégation de la Commission européenne au Maroc
Spécialiste en Développement Rural	UNICEF, Bureau du Maroc
Directrice des Affaires de la Femme, la Famille et de l'Enfance	Ministère du Développement Social, de la Famille et de la Solidarité
Attaché de la Coopération ; Attaché adjoint de la Coopération	Ambassade de Belgique
Responsable de la composante égalité et Coordinatrice du projet genre,	Direction de la Stratégie, des Etudes et de la Planification, Ministère de l'Education Nationale, de l'Enseignement Supérieur, de la Formation des Cadres et de la Recherche Scientifique
Chef de la Division de la Vulgarisation Agricole et cadres	Direction de l'Enseignement, de la Recherche et du Développement, Ministère de l'Agriculture et de la Pêche Maritime
Secrétaire Général ; Chargée d'Etudes auprès du Secrétaire Général	Ministère de la Justice

Job Title	Institution
Chef de Service de la femme et de l'enfant et point focal genre	Division des Programmes Sociaux, Direction de la Planification, Haut Commissariat au Plan
Directeur	Direction de la Programmation et des Affaires Economiques Ministère de l'Agriculture et de la Pêche Maritime
Chargée de mission auprès de M. le Walli, Directeur Général des Collectivités Locales	Direction générale des collectivités locales, Ministère de l'Intérieur
Directeur	Direction de la Population, Ministère de la Santé
Chargée de la gestion de l'Institut National du Travail et de la Prévoyance Sociale	Ministère de l'Emploi et de la Formation Professionnelle
Spécialiste en Gouvernance Démocratique	Programme Gouvernance et Développement Local, ART GOLD-Maroc, PNUD
Chef de Service des études de coûts et indicateurs de Genre ; cadre gestionnaire	Département de l'Education Nationale (Enseignement Scolaire), Direction du Budget (DAGBP), Ministère de l'Education Nationale, de l'Enseignement Supérieur, de la Formation des Cadres et de la Recherche Scientifique
Conseillère genre et égalité	Cabinet Ministre, Ministère du Développement Social, de la Famille et de la Solidarité
Directeur des Affaires Administratives et des Ressources Humaines ; Chef du Service Programmation et Budget	Département de la Formation professionnelle, Ministère de l'Emploi et de la Formation Professionnelle
Economiste Principal et Spécialiste du Secteur Public	Banque Mondiale
Chef du Service du Rapport Economique et Financier	Direction des Etudes et des Prévisions Financières, Ministère de l'Economie et des Finances

Job Title	Institution
Chef du Service du Rapport Economique et Financier	Direction des Etudes et des Prévisions Financières, Ministère de l'Economie et des Finances
Chef du Service Programmation et Budget	Département de la Formation professionnelle, Ministère de l'Emploi et de la Formation Professionnelle
Cadre gestionnaire	Département de l'Education Nationale (Enseignement Scolaire), Direction du Budget (DAGBP), Ministère de l'Education Nationale, de l'Enseignement Supérieur, de la Formation des Cadres et de la Recherche Scientifique
Cadre supérieur	ANRT, Agence Nationale de Réglementation des Télécommunications,
Administrateur	Direction de la Planification et des Ressources Financières, Ministère de la Santé
Administrateur	Direction de la Planification et des Ressources Financières, Ministère de la Santé
Cadre	Direction du Budget, Ministère de l'Economie et des Finances
Cadre	Direction du Budget, Ministère de l'Economie et des Finances
Chef de Service des Publications ; Chef du Service de la formation à distance	Direction des Affaires Administratives et Générales, Ministère de l'Economie et des Finances
Chef du Service de la Planification et de la Carte Chef de service	Département de l'alphabétisation et éducation non formelle, Ministère de l'Education Nationale, de l'Enseignement Supérieur, de la Formation des Cadres et de la Recherche Scientifique
Conseiller chargé du Genre et Développement	Contrôle de gestion, Ministère de l'Energie et des Mines
Commission Judiciaire Divisionnaire	Département des Pêches Maritimes
Chargée d'Etudes auprès du Secrétaire Général	Ministère de la Justice
Coordinateur	Ministère de la Justice Association Marocaine de Solidarité et de développement (AMSED)
Présidente	Association Rawabit
Présidente	Association Démocratique des Femmes du Maroc (ADFM)- Section Casablanca

Annex 4

Documents Used

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Annex 5

Morocco Log frame Outcome and Outputs

A country level programme log frame was included in the main programme document.⁷¹ In some cases, the final progress report for the year 2008 lists other outputs. These differences are highlighted in the table below. Observations by the evaluation team are added in italics.

Outcome 1

Outcome	Outputs in country log frame (2005)	Outputs in final progress report (2008)
National budgetary processes and policies reflect principles of gender equality in Morocco	Output 1: The EFR accompanying the annual finance bill as an instrument for policy evaluation incorporates a gender policy evaluation.	Output 1: The Gender Report, supporting the Finance Bill aims to foster a culture of transparency and to evaluate public policies from a gender perspective.
	<p>Output 2: Mechanisms set up in the budgetary process to prioritise gender-responsive policies and programmes at the national, regional and subregional levels by 2008.</p> <p>Output 3: Parliamentarians, the SSFCD (national women's machinery), women NGOs, media and other gender equality experts understand GRB and use the EFR in policy advocacy and budget monitoring.</p> <p>Output 4: Forging of linkages between engendered MDGs and quantified objectives and targets of sectoral ministries.</p>	<i>Outputs 2-4 remain the same.</i>

71 See UNIFEM (2005b): Global UNIFEM Programme in Gender Responsive Budgeting Phase II: Moroccan Component, Implemented by the Morocco Ministry of Finance in partnership with UNIFEM.

Outcome 2

Outcome	Outputs in country log frame (2005)	Outputs in final progress report (2008)
<p>Poor women's priorities are reflected in pro-poor budgeting</p>	<p>Output 1: Refined poverty maps to be used to analyse poverty and inequality dimensions and processes—particularly feminised poverty—in pilot zones and to review public expenditure.</p>	<p>Output 1: A refined poverty mapping developed to determine the multiple dimensions and dynamics of poverty—particularly in relation to the feminization of poverty— and specific inequalities in the pilot sectors involved in the GRB and to evaluate public expenditures.</p>
	<p>Output 2: A light poverty monitoring mechanism including time/energy poverty is in place in at least three pilot zones at the communal level [Community-based monitoring system (CBMS) and citizen monitoring mechanisms]</p>	<p>Output 2: A light poverty monitoring mechanism including time/energy poverty is put in place in at least two pilot areas at the community level [Community-Based Monitoring System (CBMS) and Citizen monitoring mechanisms].</p>
	<p>Output 3: At least four sectoral budgets formulate gender-responsive quantified objectives at the level of programmes and subprogramme to address women's poverty.</p> <p>Output 4: In at least three pilot zones, the (participatory) evaluation of public expenditure leads to the review of quantified objectives and the formulation of gender-responsive and pro-poor programme budgets by several ministries working effectively in collaboration and setting up partnerships with NGOs.</p>	<p><i>Outputs 3 and 4 remained the same.</i></p>

Outcome 3

Outcome	Outputs in country log frame (2005)	Outputs in final progress report (2008)
<p>Knowledge and learning on GRB facilitates the dissemination of good practices and lessons learned as well as dissemination of GRB initiatives</p>	<p>Output 1: An information and exchange network is set up at the level of the MFP, the SSFCD (through the National Women's Information and Documentation Centre - CNIDEF) and sectoral ministries</p>	<p>Output 1: Create a national and international knowledge sharing network</p>
	<p>Output 2: A mechanism of ongoing learning (including workshops, action-research and learning, e-learning at the level of MFP and sectoral ministries)</p>	<p>Output 2: same</p>
	<p>Output 3: Creation: strengthening of knowledge network at regional and interregional level on GRB and gender-sensitive poverty social impact analysis.</p>	<p>Output 3: dropped</p>
	<p>Output 4: Capitalization and knowledge management (knowledge and know-how) of pilots</p>	<p>Output 3 (corresponds to earlier output 4): Knowledge capitalization and management (knowledge and know-how) stemming from pilots</p>

Annex 6

List of Workshops and Seminars Delivered Through the GRB Programme: Phase II

(All in Rabat unless otherwise noted). This list excludes the two workshops held for NGOs in July and September 2008.

1. 22 June 2005: Gender Report
2. 22-26 May 2006: Gender Report (separate lists for each day—referred to as W2a-e in the annex)
3. 28 February, 1-2 March, 5-7 March 2007: Workshops on Gender Report 2008
4. 28-31 May 2007: Workshop on results-based budget reform, integrating gender (three separate lists but no indication of specific date on the lists), most probably for Gender Report
5. 7 June 2007: Meeting with State Secretariat in charge of Vocational Training (SEFP⁷², 9:30am)
6. 7 June 2007: Meeting with State Secretariat in charge of Literacy and Non-Formal Education (SECAENF, 3pm)
7. 20 June 2007: Meeting with SEFP (8:30am-5pm)
8. 20 June 2007: Meeting with SECAENF (8:30am-5pm)
9. 3-4 July 2007: Workshop on results-based budget reform, integrating gender with SECAENF (only one list for both days)
10. 5-6 July 2007: Workshop on results-based budget reform, integrating gender with SEFP (only one list for both days)
11. 24-27 March 2008: Technical workshop for the preparation of the 2009 Gender Report (one list for all three days and excluding opening session, and additional lists per ministerial department for 24 March, and mixed lists for 25th, 26th and 27th)
12. 13 May 2008: Workshop on results-based budget reform, integrating gender, with Department of Literacy and Non-Formal Education (DAENF, formerly SECAENF)
13. 14-15 May 2008: Workshop on results-based budget reform, integrating gender, with Departments of Employment and Vocational Training
14. 25 June 2008: Workshop on results-based budget reform, integrating gender (Intersession), with DAENF
15. 26 June 2008: Workshop on results-based budget reform, integrating gender (Intersession), with Departments of Employment and Vocational Training
16. 15 July 2008: Workshop on results-based budget reform, integrating gender (Intersession), with Department of Health
17. 15 July 2008: Workshop on results-based budget reform, integrating gender (Intersession), with Ministry of Finance and Economy

⁷² The two State Secretariats became Ministerial Departments in 2007.

Annex 7

Focus Group Questionnaire

Evaluation du programme de l'UNIFEM portant sur la
Budgétisation Sensible au Genre (BSG), Phase II,
Royaume du Maroc

Atelier de 'Focus Group' le 21 janvier 2009, Rabat

Nom: Département: E-mail:
A combien d'ateliers est-ce que vous avez assisté? (merci d'indiquer aussi les dates et l'année, et le thème de l'atelier)
Qu'est-ce que vous avez appris lors des ateliers?
Est-ce que le contenu des ateliers était adapté pour votre travail/fonction?
Est-ce que vous avez pu appliquer ce que vous avez appris dans votre travail?
Est-ce que l'impact des ateliers s'est étendu a votre organisation?

Qu'est-ce que entendez vous par le genre?

Qu'est-ce que entendez-vous par la BSG?

Pensez-vous que la BSG est aujourd'hui appliquée dans votre département?

Citez 5 indicateurs genderisés dans votre secteur

Que pensez-vous du rôle que doivent jouer les ONG des droits des femmes en matière de BSG?

Que pensez-vous du rôle que doivent jouer les parlementaires en matière de BSG?

Quelles sont vos recommandations pour une éventuelle phase III de ce programme?

Annex 8

Focus Group Questionnaire Answers

Raw data translated by the consultant from French to English

How many times did you participate in the GRB workshops and which ones?

Number of participant	Number of workshops attended
1.	Three: Gender Report (GR) workshops 2006, 2007, 2008 and MTR
2.	Two: May 2008 and World Bank
3.	One: One workshop for NGOs
4.	Several
5.	Several: on preparing the Gender Report
6.	Two: 2008 GR and World Bank
7.	Two: 2009 GR and World Bank
8.	Three: in 2006 and 2007
9.	Seven: 4 GRs, 2 for indicators in 2007 and 2008, and statistical workshop 2006
10.	Several: Since 2003 with UNIFEM, 1 with WB, one week with CEA, 2 with UNFPA
11.	Five: One in 2003, May 2007, June 2007, two in 2008
12.	Two: June and July 2007
13.	Three: one in 2007 and two in 2008 with literacy dept
14.	One: in May 2008
15.	Two: workshops for NGOs

As can be seen from this table, most FG participants have attended more than one workshop, and at least four have also participated in the GRB workshop organized by the World Bank in October 2008. The answers may thus also reflect on this latter workshop.

What did you learn at the workshops?

- what GRB is and concepts, why do GRB, how to write the Gender Report

- some techniques of gender analysis of public expenditure, gender-responsive programming and evaluation

- determine programmes and indicators

- how to budget for programmes by respecting the gender approach

- many positive things for women, learn how to read legal texts with "gender glasses"

- GRB is a means to make different departments use gender approach in their strategies and action plans

- GRB concept, its implementation and monitoring

- GRB is a new concept for budget management that helps to direct the state budget and redirect it in an equitable manner taking inequalities between sexes into account

- especially in the first two workshops (Gender Report 2005 and 2006)

- I learnt a lot, e.g. the difference between sex and gender, and that nothing is set in stone and everything can be improved

- gender analysis tools

- developing gender-sensitive indicators

- definition of gender, RB budgeting, MTEF, definition of indicators, evaluation

- how to use existing resources to achieve the objective linked to gender approach and equity between the two sexes

-practical exercises, how to do GRB for programmes and projects

- NGO: elaborated an action plan and put in place a NGO platform to monitor GRB

- NGO: it was just an introduction to GRB and update on application of gender approach by various departments

Was the content of the workshops adapted to your work/job?

1. Yes, as a statistician I didn't have any problems as I'm used to working with data
2. yes,
3. yes,
4. yes,
5. yes for some activities like the budget preparation
6. yes especially for those units in charge of budgets of sectoral departments such as education, literacy, health
7. especially in the first two workshops (Gender Report 2005 and 2006)
8. at the beginning no, but then I understood that RBM and performance-based management cannot suffice by itself if we don't introduce gender to come to a balanced whole
9. yes, included case studies linked to the programmes of our department (vocational training)
10. yes but it is still difficult to apply
11. no
12. yes (NGO)

Were you able to apply what you learnt in your work?

-Sometimes, if the superiors accept the proposals

- no

- we are trying, while waiting for the technique to materialize that will help to determine the programmes that need to be genderised

- I try to apply it for women and those victims of violence

-timidly, as the decision-making process in the administration/public service doesn't foresee anything in this regard

- the recommendations/proposals were submitted to the directors' committee

- not directly

- yes

- yes I try when I have the occasion, such as when I'm asked to develop performance indicators

- yes and no; we have gender-sensitive indicators, but we are not conducting gender analysis of the programmes of our departments (vocational training)

- our indicators take gender into account

- no

- no

Did the workshops have an impact on your organization?

- No, not on the whole organization

- ?

- yes, by publishing reports on all workshops

- yes,

- yes, It has allowed me to help and support the two last workshops on the Gender Report; it has helped me to better understand the links at the level of the process of GRB and to re-explain them during a workshop organized for the Gender Report team

- yes, since we have a "mother" gender unit

- yes, enough

- yes, through the sectoral divisions (DB)

- yes for DEPF

- even if the MEF pilots/spearheads GRB with UNIFEM, unfortunately it remains only theoretical. There is a problem of communication and also one of mentalities (DB)

- no

- yes

What do you understand by gender?

- Refers to social and cultural relations between different actors

- Gender is the equality of opportunity of women and men with regard to the access to social and economic services

- NGO: take into account all categories of society in public policies and development projects etc.

- gender is an approach that aims at equality between the two sexes in all domains, especially women's empowerment ... [Not visible]

- we know better what gender is not!

- taking social and power relations between the sexes into account

- economic, social and cultural discrimination between men and women, girls and boys, i.e. the inequality of opportunities

- a dynamic concept that allows to achieve equity between sexes through a continuous adjustment process

- gender refers to the acquired social relations between men and women, which is likely to change through time and space

- not just female and male genders that are culturally constructed, any group with specificities can be a gender, such as a group of handicapped persons who have particular needs

- men, women, boys, girls, vulnerable population, rural population

- it is a concept that links the components of society (men, women) in terms of their role in economic development

- promote equity/equality of opportunities between the two sexes in order to benefit from the services of the literacy department with the aim to improve the quality of life of the party that is most wanting and marginalized (women, children)

- it is a process whose application means a change in behaviour, attitudes and ways of thinking and acting; it consists of giving things (?) to men and women to participate in economic and social development

What do you understand by GRB?

- It aims to develop a budget that takes the different needs of men and women into account

- GRB is disaggregating the expenditures according to the needs of men and women, girls and boys, in view of rationalizing the use of resources and respond to the needs of the population

- NGO: reflect all categories of society in terms of the budget, and give results by category

- GRB is a technique/method that aims to reallocate the state budget in a way that takes into account the equality of opportunity between women and men

- modify the budget lines by taking the gender approach into account, a difficult exercise

- any budgeting process needs to take specific needs of women and men into account

- GRB is budgeting of activities that serve to reduce, through public policies, the inequalities between men and women, at the level of the state's general budget

- GRB allows to rebuild public action by putting human concerns at the centre (especially women and children) by taking the gender dimension into account at the level of programming, implementation and evaluation of public policies. It allows for the differentiated needs and concerns of men, women, boys and girls to be taken into account. It aims at equity and equality. It is done by: taking into account the gender dimension at the level of project choice according to their gender impact (ex-ante) on the beneficiary populations; and by taking the impact of budgets on men, women, boys and girls into account down-stream

- GRB is the integration of gender in public policies and the budget as the latter is the quantified translation of these policies

- an approach that helps to ensure equality and equity between genders and to ensure a sustainable human development

- formulating budgets that take needs of all components of society into account and development objectives

- to programme and implement budgeting to achieve success of gender approach

- to finalize a budget by taking the gender concept into account

Do you think that your department is applying GRB today?

- Not in an adequate way, we pretend to be applying it by disaggregating certain indicators that accompany the budget fascicles by sex and sometimes by area [rural, urban]

- there is no appropriate and special structure/unit for gender

- our department has started to work on studying the current situation and come up with recommendations to best genderise its budget

- no, not correctly and this is due to our very judicial functions and tasks of our dept

- not really

- our department has been made aware of the approach especially by international organizations such as the International Union of Telecommunications

- GRB is not yet applied in the Ministry of Finance and Economy

- not at all (DB)

- not yet (Vocational Training)

- yes but indirectly as women and deprived populations are at the heart of the work and objectives of the literacy department

What role do you think Women's Rights NGOs should play with regard to GRB?

- To help with a situation analysis/taking stock of the real needs of the various categories of people targeted by the activities of each department

- raising awareness among the population in terms of women's rights

- play the interface between the population and the administration

- their role will be very important once the GRB is at the local level

- institutionalizing GRB (especially in budget law)

- to raise awareness and critique of actions undertaken as part of GRB

- NGOs need to be more involved in the process

- NGO: mobilisation and popularisation, advocacy, monitoring the integration of gender approach in state budget

- NGO: an important mobilizing role and of monitoring/follow-up with several departments

- NGOs should not focus on the problems between men and women but also see GRB and gender in all their dimensions as inequalities also exist within the same group (group of women)

- they should play a role in awareness raising and to mobilize/fight that the government adopts GRB in all programmes and public policies

- awareness raising and motivation to apply GRB

- NGOs can play a crucial role by targeting projects that are taking GRB into account and to try to establish cooperation between state and NGOs

What role do you think parliamentarians should play with regard to GRB?

- as the body that approves the budget, the Parliament is at the heart of the matter

- they first need to be made aware of the gender question before they can be asked to play a role in GRB

- institutionalizing GRB (especially in budget law)

- control of announced by the government

- adhere to the spirit of GRB

- GRB is a process where monitoring and evaluation is important. The MPs play an important role in evaluating public policies with regard to different needs of men and women, boys and girls, and they are close to the citizens in their area and know their needs better while waiting for an effective implementation of GRB whose process starts with a participatory diagnostic/needs assessment. The Gender Report is the first document that tries to promote a culture of evaluation of political priorities in terms of women's and men's needs and taking a certain number of norms into account (CEDAW, MDG); it needs to be used so that the policies can reduce the gap between the needs assessment of the population and the norms

- MPS should advocate for GRB. Since they represent the citizens, they should provide a popularisation of GRB so that it is perceived by all strata of Moroccan society; the Parliament also should evaluate all action by the government

- they should be the locomotive of GRB and budget reform

- institutionalisation and incentive to put in place and apply GRB

- approve laws in Parliament that take gender approach into account

- NGO: important because it is through the MPs that the laws and thus GRB will be approved and applied

What are your recommendations for a possible Phase III of this programme?

- to focus on how to integrate gender in the budget

- put in place the tools for closer follow-up

- raise awareness among high-level decision makers

- conduct studies and needs assessments

- create "gender" structures in each department

- to share this evaluation with us and then see the gaps and achievements, and start Phase II to effectively (underlined) integrate GRB in programmes

- involve the professionals (i.e. lawyers for justice ministry?)

- work on changing mentalities

- I don't know the various phases (of the UNIFEM programme)

- to standardize/regularize the actions in terms of automatically integrating gender in the budgets of the different departments and programmes

- NGO: training on GRB principles, mobilize local associations for concrete actions

- NGO: a more rigorous organization to involve NGOs in GRB; improve communications to implement and monitor the various departments targeted by GRB

- need for brochures and popularisation activities

- trainings for NGOs and MPs

- restructure the budget fascicles

- workshop for each department separately with an important involvement of organizations under the same umbrella/ working in the same area (i.e. for vocational training, OFPPT etc.)

- accelerate budget reform and universalise it

- involve MPs and the media

- anchoring GRB practices

- training: training of trainers at local level, put in place distance-learning mechanism, knowledge management

- follow-up, communication, mobilisation of all stakeholders

- awareness raising, in-depth training on GRB

Annex 9

Analysis of Indicators in the 2009 Gender Report

Name of Ministry /Department	Year of budget reform	Availability of gender-disaggregated data sources	Total number of Indicators	Number of goal/ performance indicators ⁷³	Number of gender-sensitive performance indicators
Ministry of Justice	January 2006	Relatively good	75 (Operating Budget - O), 15 (Investment budget - I)	Not specified, at least five based on examples	None (p.18)
Ministry of Public Sector Modernisation	January 2007	Relatively good	11 and 18	11 in operational budget, none in investment	6 of 11 in operational budget
Ministry of Economy and Finance	2nd semester 2003	Relatively good	132 in I, none for O (one of 6 depts., see p. 34 FN 5)	Only those for training	None in O, in I only those related to trainings
Ministry of Social Development, Family and Solidarity	2006	Relatively good	106	106	A relatively high number (see examples pp. 45ff.)
Ministry of Foreign Affairs and Cooperation	Not found	Relatively good	22	3	none
Ministry of Foreign Trade	Not yet	Innovative thinking demonstrated and studies planned	N/a	N/a	N/a

⁷³ *Indicateurs d'objectifs*, as opposed to *indicateurs de moyen (means/input)* and *indicateurs de résultats*.

Name of Ministry /Department	Year of budget reform	Availability of gender-disaggregated data sources	Total number of Indicators	Number of goal/ performance indicators ⁷³	Number of gender-sensitive performance indicators
Department of Water	2005	Only time-use study from 1997/98, 2003 WB PAGER impact study		50, but most are means and only a few impact	Almost none, three identified with potential
Department of Energy	2006	Limited, copy and paste since first GR	several	No results indicators, only means or outputs	None is genderised
Ministry of Equipment and Transport	Not found	Very limited, 1996 WB study and 2002 MET study	100	Mostly monitoring indicators	none
Department of Housing	2005	Time-use study from 1997/98, good analysis of gender discrimination in property titles p. 83, some programme beneficiary data are sex-disaggregated	4 (o), more than 80 (l)	Some are means or monitoring indicators	none
Ministry of Health	2002 (first one)	Census data 2004, 2003-2004 Survey on Population and Family Health and more recent for specific programmes	209, whereof 34 regional and 50 related to main health programmes	Health programmes: means not performance indicators	Health programmes: 2; and maternal health indicators are sex-specific anyway
Department of National Education	2006	School enrolment data of previous year, and FAES support	145 for both, 36 regional indicators	No info	7 out of 36 regional indicators are genderised (p. 106)
Department of Literacy and Non-Formal Education	2008	Information system to be set up shortly	In the process of development	N/a	N/A, but suggestions and see 2008 report p. 93 (when it was still a State Secretariat)

⁷³ *Indicateurs d'objectifs*, as opposed to *indicateurs de moyen* (means/input) and *indicateurs de résultats*.

Name of Ministry /Department	Year of budget reform	Availability of gender-disaggregated data sources	Total number of Indicators	Number of goal/ performance indicators ⁷³	Number of gender-sensitive performance indicators
Department of Employment	2008? (among the last)	Relatively good	40 for both		None, but sex-disaggregated databases exist
Department of Vocational Training	September 2007	Relatively good	66: 6 for O and 60 for I	O indicators are results, on female training participants	Several are sex-disaggregated (see p. 127ff)
Department of Youth	2007	2004 census, 2004 study on youth in Morocco	80: 30 for O and 50 for I	Need to include more perf. indicators related to strategic objectives; none of investment budget is perf. but means and monitoring indicators	None; need for sex-disaggregated data and indicators esp. on youth summer camp programme
Department of Agriculture	2003	Since 2002, specific budget line for socio-economic promotion of rural women; data on beneficiaries; 2004-2006 FAO support to integrate gender, other data sources not indicated (but probably 1996 Agriculture Census)	10	8	Only DERD directorate integrates gender approach
Department of Maritime Fisheries	2003	Not clear	69 for investment budget, regionalized	Indicators are not specific enough (p. 151)	4 out of 20 that relate to gender-sensitive programmes

73 *Indicateurs d'objectifs*, as opposed to *indicateurs de moyen (means/input)* and *indicateurs de résultats*.

Name of Ministry /Department	Year of budget reform	Availability of gender-disaggregated data sources	Total number of Indicators	Number of goal/ performance indicators ⁷³	Number of gender-sensitive performance indicators
Department of Industry and Commerce	2007	Annual survey on processing industries (2006 data), and other studies	66 for O and 135 for I	Indicators are not related to strategic objectives, and confusion between means and performance indicators	None; and Sectoral strategy (plan Rawaj) is gender blind (p. 162)
Department of New Technologies	2005	Very limited (no sex-disaggregated data)	7	Only 1 out of 7 is performance indicator (p. 170)	none
Department of Social Economy	2007?	Good for cooperatives but not for other types of groupings; need for database (p. 177)	6	Only 1 out of 6 is performance indicator (p. 178)	none

⁷³ *Indicateurs d'objectifs*, as opposed to *indicateurs de moyen (means/input) and indicateurs de résultats*.

