



Mainstreaming Gender in  
Latin America and the Caribbean:

# Mixed Methods Analysis of Policies, Perceptions, and Social Media

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Gender Champion: Gabriela Andrade, Senior Specialist, Capital Markets and Financial Institutions Division, IDB.

Gender Champion: Matteo Grazzi, Specialist, Competitiveness, Technology and Innovation Division, IDB.



## Abstract

### Methods

The study uses a mixed methods convergent parallel design in which the results of quantitative and qualitative research methods are analyzed concurrently to gain insights regarding potential factors that could either constrain or enable the integration of gender perspectives into the IDB Group's work. Each method (or "string") aims to capture stakeholders' perspectives. Quantitative strings included the results from the Bank's External Feedback System (EFS), Interactive Voice Response surveys, social media (network) analysis, natural text algorithm analysis of national development plans and the IDB's operational documents, a gender indicator review, and an analysis of the Bank's own ratings of how gender is incorporated into sovereign-guaranteed loans. Qualitative strings include results from in-depth interviews and focus groups with IDB technical staff and in-country counterparts, along with document reviews.

### Conclusions

Gender equality is considered by governments and citizens in LAC to be important for development. Within that topic, of particular concern is violence against women, adolescent pregnancy, reproductive and maternal health, labor force participation and entrepreneurship, and women's voice and participation in governance. These issues are consistent with the five areas prioritized by the IDB's operational policy on gender.

There are still challenges to gender mainstreaming in what qualitative research participants have categorized as "nontraditional" areas (e.g., transportation, energy, water and sanitation, and climate change). However, there are examples where IDB-supported projects in these nontraditional sectors have successfully incorporated a gender perspective, most notably in transportation thanks to strong leadership by the corresponding division and other key individuals within the Bank.

While gender data are increasingly available for most of LAC, and even when operational teams are aware that the data exist, there are still perceived and real transaction costs to routinely collecting those data. Fewer national-level gender indicators collected by international institutions are available for the Caribbean, and the extent to which official gender statistics for these countries exist is unclear.

The following tools, developed during this study, can be readily used to support gender mainstreaming:

- A text algorithm developed in-house that helps analyze unstructured data regarding gender terms in strategic and operational documents. Staff can use this tool to quickly scan for gender issues in international treaties, national development plans, policies, and legislation, as well as in all Bank-produced documents, and to communicate findings to sector specialists. Staff can also use the algorithm as a screening and monitoring tool to help save time.
- A tailored and automated Gender Dashboard that compares gender-related indicators by country in order to reduce the cost of acquiring and updating data, and, in turn, to save time and support country dialogue and project design.
- A methodology to analyze social media in order to understand how citizens are talking about gender-related topics, and to identify key influencers, hashtags, and dates in order to strengthen the Bank's dialogue with its development partners and improve the effectiveness of how it communicates what it is doing to promote gender equality.

### Summary of recommendations

#### **Mobilize leadership and support for key individuals**

- Mobilize senior leadership early on in project conceptualization as well as in the dialogue with countries.
- Provide continuous training for staff and consultants, particularly for those serving as focal points for gender mainstreaming.
- Partner with the entities that can help incorporate gender mainstreaming in government (e.g., National Machineryes for the Advancement of Women) or identify whether efforts are needed to strengthen the capacity of those entities and increase their effectiveness.

**Enhance monitoring of the inclusion of gender in Bank activities**

- Explore decreasing the time spent monitoring gender by using a text algorithm, and reallocate these resources to continue supporting teams, particularly those working in nontraditional areas that do not currently have gender expertise.
- Explore the possibility of developing automated text classifiers to track the specific gender policy areas addressed in each IDB document (e.g., track areas of mainstreaming in such areas as education, labor, and violence against women).

**Enhance communication efforts**

- Communicate the body of knowledge produced by the IDB and focus on the products that are of most interest to countries (e.g., impact evaluations, research, policy notes, and pilot projects).
- Partner with key social media influencers, government and civil society organization leaders, and national mechanisms to advance women in order to communicate the results of Bank-supported analytical and operational work.

**Increase access to data and information**

- Continue supporting the use of official statistics such as household surveys and census data as sources of gender data.
- Strengthen and enhance existing efforts to generate, increase access to, and evaluate the quality of gender data, especially in countries with lower statistical capacity such as those in the Caribbean.
- Facilitate easier access to existing analytical work, particularly impact evaluations related to gender and gender equality.

**Continue aligning with regional priorities**

- Monitor national development plans (with the help of a text algorithm) for specific examples of how government is working on gender. Communicate these examples to both project teams and government counterparts during the project and Country Strategy design process.
- Continue assessing the alignment between the IDB's and the Region's priorities regarding gender mainstreaming through the Bank's External Feedback System.



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## Abbreviations and Acronyms

API	Application Program Interface
CAN	IDB Country Department Andean Group
CCB	IDB Country Department Caribbean
CDH	IDB Country Department Haiti
CID	IDB Country Department Central America
ConSOCs	IDB Civil Society Consulting Groups
CSC	IDB Country Department Southern Cone
CSD	IDB Climate Change and Sustainable Development Sector
CSO	Civil society organization
ECLAC	Economic Commission for Latin America and the Caribbean
EFS	EEExternal Feedback System
GDI	GIDB Gender and Diversity Division
GPS	General Perception Survey
ICS	IDB Institutional Capacity of the State Division
IDB	Inter-American Development Bank
INE	IDB Infrastructure and Energy Sector
IVR	Interactive Voice Response
LAC	Latin America and the Caribbean
ODIN	Open Data Inventory
OECD	Organization for Economic Cooperation and Development
SCL	IDB Social Sector
SDV	IDB Strategic Development Division
SMO	IDB Strategy Monitoring Division
SPD	IDB Office of Strategic Planning and Development Effectiveness
TC	Technical Cooperation

# 1

# INTRODUCTION





Gender Champion  
**Gerard P. Alleng**

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The Inter-American Development Bank (IDB) Group has long recognized the importance of listening to its diverse development partners, particularly those based in the 26 borrowing member countries it serves, in order to continually improve its operations.<sup>1</sup> In 2012, the Bank institutionalized this process through its External Feedback System (EFS), which collects the perceptions of its stakeholders about the challenges the Region faces and the Bank's ability to help address them. Consistently, partners have ranked the Bank's understanding of the priorities of Latin America and the Caribbean (LAC) as one of its strengths: in 2015, 82 percent of partners were satisfied with the Bank's understanding of the Region's priorities and context.

One such challenge is gender equality, which is a crucial element of inclusive and sustainable economic development. Since the early 1990s, achieving gender equality has been a key component of the IDB's agenda. In fact, gender equality is one of the three key cross-cutting issues of the IDB's Institutional Strategy.

The Bank introduced the issue of empowering women in its operational policies in the late 1980s through the Women in Development Policy,<sup>2</sup> which evolved over the years into the Gender Operational Policy in 2010 and to subsequent Gender Action Plans (2011–2013 and 2014–2016).

One of the ways in which the IDB promotes gender equality is through gender mainstreaming, which involves promoting the integration of a gender perspective “throughout the design, implementation, monitoring and evaluation of its operations”<sup>3</sup> and in its dialogues with countries through Country Strategies (Box 1).



“A substantial fraction of the income inequality in LAC is determined by characteristics such as race, place of birth, the education levels of one's parents, gender, and sexual orientation. These deep inequalities in well-being mean that the focus on fairness must be increased to ensure that those underserved or excluded—primarily women and minorities, including the disabled—are given equal opportunities for growth.”

IDB INSTITUTIONAL STRATEGY 2010 - 2020

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<sup>1</sup> The IDB Group is comprised of the IDB, the Multilateral Investment Fund, and the Inter-American Investment Corporation.

<sup>2</sup> The earliest mention of this policy was found in a memorandum regarding the Women in Development Policy Draft and Background Paper on May 27, 1987. The Bank has also pioneered projects that aim to eliminate violence against women in the Region, such as the Regional Pilot for Preventing and Addressing Violence Against Women in 1996 (TC-95-07-12-2-RG).

<sup>3</sup> See the [IDB Gender and Diversity Portal](#)

## INTRODUCTION

The Bank's systems aimed at monitoring and evaluating projects and Country Strategies include mechanisms to listen to what our key stakeholders have to say about the Region's key development challenges, as well as the Bank's products and services and how they are delivered.<sup>4</sup> This information has been captured through the Bank's External Feedback System, which since 2012 has captured the perceptions of over 8,000 individuals from government, academia, civil society, and the private sector. These results are complemented by the public opinion of Latin American citizens channeled to us through a partnership with Latinobarómetro.

In addition, as a complement to a growing body of Bank research on gender and gender equality,<sup>5</sup> the Bank's Gender and Diversity Division (GDI) annually reviews and reports on the extent of gender mainstreaming in IDB-funded projects and Country Strategies. Of particular note is the increase in the number of sovereign-guaranteed loans that include gender-related results in the project results matrix, which reached nearly half of all sovereign-guaranteed loan approvals in 2015, an increase of 11 percent from 2011.<sup>6</sup>

The Bank has identified an opportunity to analyze existing and new sources of data it had already collected on gender from the EFS and through GDI's monitoring efforts. The aim is to complement those data with new sources of information—including in-depth interviews and innovative monitoring tools such as a social media analysis and text mining—in order to obtain a more complete and detailed picture of the Region's needs regarding gender equality and how the Bank can respond to these needs based on what it is currently doing.<sup>7</sup>

### BOX 1 - HOW THE IDB PROMOTES GENDER EQUALITY IN THE REGION

The IDB's Operational Policy on Gender Equality in Development states the institution's commitment to support gender equality in the Region through the following:

1. **Gender Mainstreaming**, including a gender perspective in IDB-supported projects and in the IDB's analytical work;
2. **Direct Investment**, in knowledge and capacity-building products in areas that are strategic for gender equality and women's empowerment; and
3. **Gender Safeguards**, put in place through reviews of IDB-financed operations to identify and address adverse impacts and the risk of gender-based exclusion, ensure the inclusion of women and men in consultation processes, and ensure compliance with applicable legislation relating to equality between men and women.

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<sup>4</sup> At the project level, the IDB's Development Effectiveness Framework provides three tools to monitor and assess the impact of a project throughout its lifetime. First, the Development Effectiveness Matrix is used to assess the project before it is approved, focusing on how well the project is designed and to what extent its expected results can be measured. Second, the Project Monitoring Report tracks the project's progress toward reaching its stated development objectives throughout project execution. Third, the Project Completion Report, a self-evaluation tool, assesses whether the project met its expected results. At the corporate level, the IDB uses the Corporate Results Framework to monitor and report on development results stemming from the projects it supports. The Strategy Monitoring Division of the IDB's Office of Strategic Planning and Development Effectiveness (SPD/SMO) reports on gender-related indicators at the corporate level through the Corporate Results Framework. Two such indicators are the number of women beneficiaries of economic empowerment initiatives, and the level of financing in support of gender equality from sovereign- and non-sovereign-guaranteed lending as well as grant financing through the Bank's technical cooperation operations.

<sup>5</sup> See IDB's publications relating to gender equality by clicking [here](#).

<sup>6</sup> See the Annual Progress Report on the Implementation of the Gender Action Plan for Operations 2014–2016.

<sup>7</sup> The study was led by SPD/SMO as part of its efforts to help implement the recent Update to the Institutional Strategy throughout the Bank. The work was carried out in conjunction with a team of teams from GDI, the Strategy Development Division (SPD/SDV), the Institutional Capacity of the State Division (IFD/ICS), the Knowledge and Learning Sector, the Multilateral Investment Fund, the Inter-American Investment Corporation, and the Vice-Presidency for Countries.



The findings of this analysis of existing and new sources of data are very detailed and will no doubt help the IDB continue its ongoing work aimed at achieving gender equality. This report highlights some of the key findings that are applicable to development more broadly.

In terms of the Region's needs, the data on perceptions show that the Bank's approach is aligned with the Region's priorities regarding gender equality, as established by the IDB's Gender Sector Framework document and by the text-mining exercise. High-level officials show a keen interest in impact evaluations and knowledge products. Violence against women and equality regarding economic opportunities are particularly important issues for civil society organizations (CSOs) and for citizens. Overall, however, there is a low level of knowledge of the Bank's work on gender equality both in terms of the CSOs and other stakeholders who are involved with the Bank and therefore should be informed. The pilot social media analysis also points to violence against women as a key gender topic, and points to November 25 as the peak date for conversations, as that is the date each year of the International Day for the Elimination of Violence against Women. The social media analysis data are very rich and have the potential to help Bank specialists in their dialogue with the countries regarding events related to specific gender subtopics.

In terms of how the Bank is working, the in-depth interviews show that concrete policies are key to gender mainstreaming, as are individuals who are actively championing gender issues. These individuals need continued support to be able to effectively bridge gender to sectoral areas. Leadership is crucial. Respondents identified the need for data to help establish how gender is present in their work. However, despite advances in the availability of data, access is still a challenge for them, particularly in sectors not typically associated with gender such as transportation, energy, or climate change. A review of gender indicators shows that data on these topics are also less available for Caribbean countries.

The transportation sector has incorporated gender into its work thanks to both leadership and supportive individuals and their approach to development. While limited gender data are available for transportation, the sector has been able to leverage what data are available.

One of the key results of this study has been the development of several innovative tools, including a text-mining algorithm, an indicator dashboard, and the social media methodology, to support the IDB Group in monitoring gender mainstreaming. The benefits of this endeavor can also be extended beyond gender issues, as an approach to monitoring that employs these tools can be applied to other areas of high strategic value.





# 2

## METHODOLOGY





Gender Champion

**Ophélie Chevalier**

Senior Specialist, Fiscal and Municipal Management Division, IDB.



Public Sector

Many individuals are involved in the process of designing and approving an IDB project or Country Strategy, from internal stakeholders across a variety of business units within the IDB Group's Management and Board of Executive Directors, to external stakeholders, including elected representatives from local and national governments, CSOs, and advocacy groups, as well as individual citizens, project proponents, contractors, and experts.<sup>1</sup> As such, the assumption underpinning the methodology used in this study is that insights on opportunities to incorporate gender mainstreaming into the Bank's work can arise from the contexts in which these different actors operate, from the beliefs they hold, and in turn, from their behavior.<sup>2</sup>

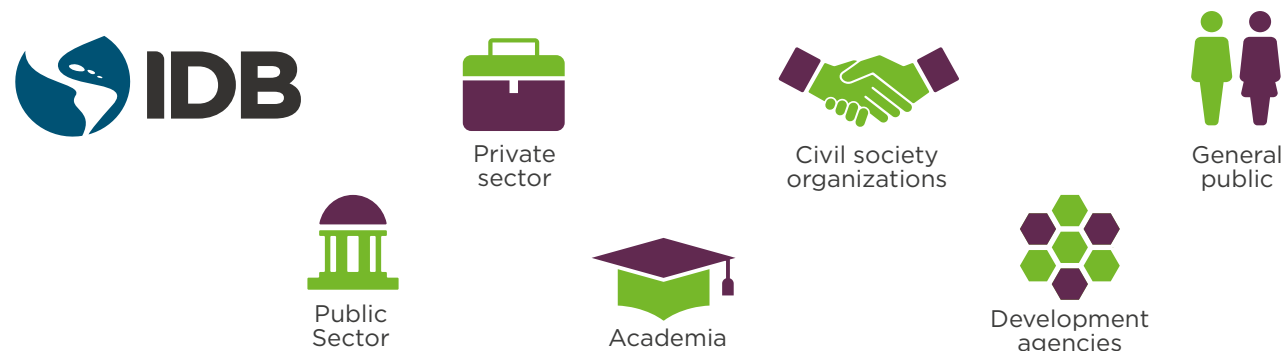
Since 2013, the Bank has collected stakeholders' perceptions on the importance of gender equality for their country's sustainable development through the EFS General Perception Survey (GPS). The Bank has surveyed key individuals in the public and private sectors, academia, CSOs, and international development agencies. While a snapshot of general perceptions is useful to provide specific recommendations on how to move forward with gender equality, a more in-depth understanding of the Region's needs is required. For this purpose, additional data and types of data were collected through the more specialized EFS surveys to help build a more complete picture.

For example, to further understand the perspective of government, questions were added to the EFS Programming Survey that targets high-level officials, including ministers of finance and planning. The questions address the importance of gender equality in terms specific to a country's development agenda (with which such high-level officials are intimately involved), the specific gender topics that respondents believe are a priority, and the Bank products related to gender that respondents are most interested in. Although the survey covers only a small group of respondents, it is an important group—these are the individuals who are engaged in the programming dialogue with the Bank and who are directly involved in defining what their governments borrow for.

To gain a more complete understanding of how gender equality is prioritized by governments in the Region, the information collected by the EFS Programming Survey was complemented by a review of national development plans and gender plans, as well as an analysis of secondary data regarding institutional mechanisms for the advancement of women,<sup>3</sup> which are the entities within government that help advance gender mainstreaming (e.g., ministries of women).

Finally, an indicator review was conducted to understand the types of gender data available for each country.

## ILLUSTRATION 1 - STAKEHOLDER PERCEPTIONS CAPTURED THROUGH THE STUDY



<sup>1</sup> Guidelines on Consultation and Stakeholder Engagement in IDB Projects, July 2013, retrieved from <https://publications.iadb.org/handle/11319/5801?locale-attribute=en> July 2016.

<sup>2</sup> This goes back to the theory of planned behavior, championed by Icek Ajzen, that links human behavior to beliefs. Antanas Mockus (1994, 2002) conjectured that human behavior is motivated by the rewards and punishments exerted by three types of norms: legal, cultural, and moral.

<sup>3</sup> Also known as "national machineries for the advancement of women."

## METHODOLOGY



A large factor that carries weight in how Bank projects and country strategies are shaped is the Bank itself. IDB specialists and government officials (e.g., members of executing agencies, and IDB Country Executive Directors on the Bank's Board of Executive Directors) involved in project development and Country Strategy dialogues were asked to participate in in-depth interviews and focus groups to identify the specific IDB-related factors that contribute to including or excluding gender in IDB operations and strategies. These kinds of very detailed data were sought out to help formulate specific recommendations on how the Bank can improve.

Since 2011, the Bank has been systematically reviewing the quality of gender mainstreaming in both operations and Country Strategies through GDI ratings and by examining the numbers of projects with gender-related results. These data were analyzed in conjunction with a text-analysis algorithm to provide more detailed information to complement the GDI rating. These operational data also served as the anchor for tying together all other data sources in an exploratory manner



Civil society organizations

Members of the Bank's Civil Society Consulting Groups (Con-SOCs) can participate in consultations for the preparation of projects and Country Strategies, so hearing this group's voice was also considered to be very important. In addition to the questions captured by the GPS, questions were added to the EFS Civil Society Survey, which targets individuals in Con-SOCs and individuals identified as being part of key women's groups in the region. These individuals were asked about the key gender issues in their countries and their perceptions of the effectiveness of the IDB in addressing these issues.

The surveys also sought the opinion of the general public. Citizens can also attend public consultations, and their views have an impact on elected officials. In addition, and most im-



General public

portantly, their input is critical because they are the ultimate beneficiaries of Bank activities. In 2016, the EFS's partnership with Latinobarómetro was leveraged to include a question regarding the issues that are crucial for a countries' development. Gender equality was included as one of the issues, which again allowed for a snapshot understanding of positions on gender.

These analyses were complemented by a pilot study that examined social media conversations about gender. This analysis helped capture not only overall trends on what gender topics are being talked about, but also information on who is talking and the specific country dynamics that are leading to these conversations. A large Interactive Voice Response (IVR) survey was applied to 1 million households (with a 32 percent response rate) to validate some of the findings with a larger group of citizens, although it is understood that social media captures conversations not only of citizens but also of government officials and civil society.



The assumption underpinning the methodology used in this study is that insights on opportunities to incorporate gender mainstreaming into the Bank's work can arise from the contexts in which these different actors operate, from the beliefs they hold, and in turn, from their behavior

## Mixed Methods Approach

The mixed methods research approach “actively invites us to participate in dialogue about multiple ways of seeing and hearing, multiple ways of making sense of the social world, and multiple standpoints on what is important and to be valued and cherished.”<sup>4</sup> Data on perceptions come in both qualitative and quantitative forms. While quantitative approaches (e.g., surveys with large sample sizes) are more typically used for guiding corporate strategy, more recently, qualitative research that uses small samples is being used to “inform functions such as strategy and long-range planning.”<sup>5</sup> Combining both quantitative and qualitative approaches can provide a better understanding than either approach on its own,<sup>6</sup> as it allows for examining a research question from multiple perspectives. Such an approach can be useful when dealing with complex research questions that involve various actors—as is the case with the research question at hand. Mixed methods enable the combination of “elements of qualitative and quantitative research approaches (e.g., use of qualitative and quantitative viewpoints, data collection, analysis, inference techniques) for the purposes of breadth and depth of understanding and corroboration.”<sup>7</sup>

For each of the research methods used, data collection and analysis were carried out concurrently—a mixed methods convergent parallel design.<sup>8</sup> Quantitative methods included the analysis of survey results, social media conversations, gender indicators, and GDI ratings. Qualitative research methods in-

cluded in-depth interviews and policy and document reviews (including text algorithm output). Interview results were given methodological priority, as they were expressly directed towards understanding the opportunities for gender mainstreaming holistically.<sup>9</sup> The results from each method were used as individual data points that were analyzed together using Grounded Theory (Strauss and Corbin 1998) to identify the recurring patterns or trends regarding opportunities for gender mainstreaming.

## Limitations

There are various limitations to the mixed methods approach. Since data from many sources are simultaneously presented, important details may be sacrificed for the purpose of brevity, especially as the number of methods increases. Because methods are by definition different, certain results are not directly comparable without additional context. In addition, because the mixed methods research used in this study did not incorporate a comparable control group or identification strategy demonstrating that observed relationships are causal, it may be difficult to convince others of the validity of the results. Finally, each of the individual methods used as part of the mixed methods approach has its own constraints that, compounded, may have unintended biases. Nevertheless, given the type of data available, and the purpose of the study, this mixed methods approach was deemed the most appropriate.

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<sup>4</sup> Green (2007, p. 20).

<sup>5</sup> Anderson (2009, p. 24).

<sup>6</sup> Creswell Plano Clark (2007).

<sup>7</sup> Johnson, Onwuegbuzie, and Turner (2007, p. 123).

<sup>8</sup> Creswell and Clark (2007).

<sup>9</sup> All of the data sources are summarized in Table 1.

## METHODOLOGY

**TABLE 1: SUMMARY OF DATA SOURCES AND METHODS**

SCOPE	DATA SOURCES	RESEARCH METHOD
<b>Drivers and barriers at each point of the project and Country Strategy approval process:</b> 80 individuals	<ul style="list-style-type: none"> <li>• In-depth interviews, informal interviews, and focus groups</li> <li>• 80+ IDB personnel and government officials</li> </ul>	In-depth interviews and focus groups
<b>Current state of gender policies:</b> 26 IDB borrowing member countries	<ul style="list-style-type: none"> <li>• 22 national development plans</li> <li>• 16 national gender plans</li> <li>• Level within the Governmental Hierarchy of National Machineries for the Advancement of Women (ECLAC)</li> </ul>	Document review, text mining, and indicator review
<b>Gender in IDB operational documents by country and sector:</b> 26 IDB borrowing member countries	<ul style="list-style-type: none"> <li>• Sovereign-guaranteed loan and technical cooperation documents, 2011–2015</li> <li>• Country Strategies, 2011–October 2015</li> </ul>	Text mining
<b>Perceptions of the importance of gender equality:</b> 26 IDB borrowing member countries	<ul style="list-style-type: none"> <li>• External Feedback System (EFS) General Perception Survey, 2013</li> <li>• EFS Programming Survey, 2015</li> <li>• EFS Civil Society Organization Survey, 2015</li> </ul>	Online surveys
<b>Perceptions of gender equality:</b> 18 Latin American countries	<ul style="list-style-type: none"> <li>• Latinobarómetro results, 2016</li> </ul>	Face-to-face surveys
<b>Key gender topics in social media:</b> 5 countries	<ul style="list-style-type: none"> <li>• Social media analysis, November–December 2015</li> <li>• Interactive Voice Response (IVR) survey, December 2015–January 2016</li> </ul>	Social network analysis and IVR survey
<b>Availability of gender data:</b> 26 IDB borrowing member countries	<ul style="list-style-type: none"> <li>• International country-level indicators on gender</li> <li>• IDB, Numbers for Development; World Bank; No Ceilings Project; World Values Survey; World Economic Forum</li> <li>• Open Data Inventory (ODIN) of official statistics</li> </ul>	Indicator review

# 3

## RESULTS FROM EACH METHOD





Gender Champion

**Claudia Stevenson**

Lead Specialist, Competitiveness, Technology and Innovation Division, IDB.





## The Inter-American Development Bank

### Insights from the In-Depth Interviews and Focus Groups

To identify the enablers of and constraints to gender mainstreaming, two sets of interviews and a focus group were conducted with 84 government officials and IDB personnel, including Country Representatives, Country Coordinators, Country Strategy Coordinators, specialists, and consultants working in operations and with Country Strategies.<sup>1</sup> Four main insights emerged from the interviews and the focus group.

#### 1. Policies and institutional prioritization of gender are the basis for mainstreaming

The results pointed to the importance of the Bank's policies on gender, particularly those that were embedded in an institutional mandate—such as the introduction of gender as one of three cross-cutting themes in the Bank's current Institutional Strategy—and those that have clear and specific guidelines for action, such as the Gender Action Plans. National development plans and gender plans were also mentioned as important, as they were perceived to frame the conversation on gender topics between the IDB and governments during the preparation of projects and Country Strategies. However, as will be described later in this report,<sup>2</sup> having national gender objectives and targets does not necessarily determine how gender issues are incorporated in either Country Strategies or projects.

#### 2. Gender should be considered earlier in the design process, supported by the engagement of key individuals

The results also indicated that key individuals both in government and at the Bank are perceived to be key to incorporating a gender perspective in projects and Country Strategies.

A way to describe these key individuals or champions is through the Mockus (1994) description of “cultural amphibians”—individuals who can move fluidly between roles in an increasingly specialized setting, “recontextualizing” their different roles to translate different realities to each of the contexts they are part of, and as they do that, “change the game.” It was noted that gender mainstreaming is highly compartmentalized in terms of perceptions, and in particular that it is strongly associated with certain areas of work. But it is also compartmentalized in terms of technical knowledge. In-depth interviews indicate that even in sectors where one is likely to find individuals with an understanding of, and an appreciation for, the importance of gender mainstreaming, sector specialists do not typically have this technical expertise. The interviews and focus group identified six types of cultural amphibians driving the mainstreaming effort:

- i. High-level leaders (government officials in senior management and, in the case of the IDB, the Executive Vice-President, among others) who are passionate and knowledgeable about gender and act as catalysts by challenging non-traditional sectors (most notably transportation) to mainstream gender.
- ii. GDI staff and consultants who work with the Division Chiefs for the different sectors to identify how closing the gender gap is relevant to each particular development topic. These staff help develop targets for incorporating a gender perspective in sovereign-guaranteed loans at the division level, which becomes more relevant when targets become part of the Division Chiefs' individual work programs (as expressed in the Bank's work planning and performance evaluation system, CareerPoint).

<sup>1</sup> See Appendix B for more details about the interview sets and the focus group.

<sup>2</sup> Anderson (2009). See the final section of the report entitled “Bringing It all Together.”

## RESULTS FROM EACH METHOD

iii. Gender consultants working directly in operational divisions throughout the Bank. These consultants have two sets of technical expertise: in gender and in the sector. Therefore, they are able to translate how a policy applies to a particular sector, and are able to interact more fluidly with sector specialists. These consultants are perceived to be more effective when they have explicit support from the corresponding Division Chiefs.

iv. GDI staff who work with Division Chiefs to identify what are known as “gender focal points,” that is, sector specialists who liaise with GDI. Some of these specialists are assigned targets in their individual work programs. Gender focal points are more effective when they are provided with support that can strengthen their knowledge of gender topics.

v. Government officials and IDB sector specialists leading projects who see the value of incorporating a gender perspective in order to strengthen projects, and who can convey the importance of gender mainstreaming to their counterparts, particularly in nontraditional sectors (see below).

vi. IDB senior management and individuals who are influential during the final stages of approval of a project or Country Strategy (e.g., Country Representatives, Division Chiefs, Cluster Coordinators, Country Strategy coordinators, and Strategic Development Division Economists who are evaluating the projects) but are not part of the project teams. They act independently of efforts by the Executive Vice-President and GDI, they are passionate about gender issues, and they often have solid technical knowledge of gender topics. These individuals make gender visible during project design and Country Strategy approval processes, particularly during the Quality and Risk Review. They may or may not be part of the Bank’s formal network of gender champions.

These individuals are most effective if (i) they have strong technical skills in both gender mainstreaming and the sectors

in which they operate so that they can translate or “recontextualize” gender mainstreaming policies to the specific sector or country context; (ii) they are given the space to coordinate and move fluidly across their different roles;<sup>3</sup> and (iii) they are empowered to influence decision-making.

Although not cited specifically in any of the interviews or the focus group, CSOs, particularly those advocating gender equality, can have a potentially large influence on gender mainstreaming at the IDB, as they are consulted during the preparation of Country Strategies and projects.

While other IDB staff or government officials can adopt the characteristics of effective cultural amphibians, the role of GDI will continue to be critical to mainstreaming. However, interactions with the core GDI team showed that they have relatively limited resources given the overall volume of IDB Country Strategies and operations carried out each year. Many of the activities they undertake are time-intensive, such as reviewing hundreds of documents per year to determine whether and to what extent projects incorporate gender. To illustrate this point, we measured the time it would take an individual to review a sample of 100 technical cooperation documents. It took two people 16 hours in total to (i) identify and download the approved abstracts of the 100 technical cooperation documents; (ii) identify and extract the paragraph containing the main objective of each technical cooperation operation; and (iii) annotate in a spreadsheet whether the objective mentioned gender.

Building on these results, the working group for this analysis created a text-mining algorithm to make this process more efficient. In less than an hour and a half, the text-mining algorithm searched, downloaded, and mapped how gender was present in almost 2,000 official Bank documents related to individual sovereign-guaranteed loan and technical cooperation operations. While applying this algorithm cannot replace

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<sup>3</sup> Amplifying communications across links is another key characteristic of Mockus’s (1994) definition of cultural amphibians.

GDI's role in assessing the quality of how gender is incorporated, it can certainly help reduce the time and effort to initially screen the documents. This algorithm has the potential to help monitor the mainstreaming of gender (as well as other topics), but is not intended for results reporting or evaluation.<sup>4</sup>

### 3. Gender-related data and evidence (e.g., impact evaluations) are crucial for mainstreaming

Not surprisingly, evidence-based gender assessments are seen as critical for more effective gender mainstreaming and to support the dialogue with governments during the preparation of projects and Country Strategies.

More than half of the individuals interviewed about gender mainstreaming in Country Strategies used the words “diagnostic” or “indicator,”<sup>5</sup> and the rest referred to “data,” “information,” “impact evaluations,” and “studies.” For example, one interviewee said, “We are missing knowledge to understand the ‘why’ of certain situations. You would think that we understand, but we lack specific studies that corroborate that.”

Interviewees also pointed to the limited availability of data, particularly if they worked in sectors not typically associated with gender—this was the case for example for many interviewees who worked in infrastructure sectors (energy, transportation). Some mentioned that existing national statistical instruments could be a rich source for gender-related data, but that access to these data was uneven, and even if the data were available, a high level of technical sophistication was needed to access them efficiently.

In addition to the availability and accessibility of data, there are other reasons that help explain why gender data are not fully used. Even when data exist, they may be not used by

development practitioners because of a lack of awareness, questionable quality of the data, or a lack of relevant skills and resources to use the data.<sup>6</sup> Some interviewees indicated that acquiring and continually analyzing these data may be perceived as involving high transaction costs. A recent study by the IDB on the availability and use of data on financial inclusion pointed to the need for strong leadership from the top down to collect, analyze, and disseminate gender data.<sup>7</sup>

It is important to note that one of the major challenges identified by research participants in terms of mainstreaming gender is that gender issues are often raised too late in the preparation of projects and Country Strategies. Gender equality may be important to project teams, but it is not necessarily on their radar at the time of project conceptualization. Often gender is not made visible until just before approval<sup>8</sup> by individuals outside the project teams, so gender considerations are included only superficially. Furthermore, raising gender too late in the process may distort the overall project design.

### 4. Transcending the “traditional” and “nontraditional” labels for more inclusive development

When it came to gender mainstreaming, respondents either explicitly or tacitly referred to two types of development areas. Issues such as education, health, and economic empowerment, which belong to the Bank's Social Sector (SCL), were viewed as “traditional” areas for gender mainstreaming, while such areas as energy, transportation, water and sanitation, and climate change, which correspond to the IDB's Infrastructure and Energy (INE) and Climate Change and Sustainable Development (CSD) Sectors, were seen as “non-traditional” areas for gender mainstreaming. Participants perceived that it is easier to incorporate gender issues in traditional sectors than in nontraditional ones, partly because of the greater availability of data.

<sup>4</sup> See Annex D for more technical details.

<sup>5</sup> Seventeen of the 30 individuals interviewed allowed the interview to be recorded, and 31 individuals were interviewed in total regarding the Country Strategy (see Annex B for additional details). Words were identified by applying the text algorithm to interview transcripts.

<sup>6</sup> Consistent with Chui et al. (2011).

<sup>7</sup> Pailhé (2015).

<sup>8</sup> Particularly at the Quality and Risk Review phase, which occurs prior to consideration for approval of the operation by the Bank's Senior Management and later the Board of Executive Directors.

## RESULTS FROM EACH METHOD

However, there has been gender mainstreaming in nontraditional sectors, most notably in the transportation sector. The work performed by this division is described as more holistic, leveraging transportation to advance all kinds of development issues, including health, economic empowerment, and violence against women, and is reflected in recent work in the sector.<sup>9</sup> One example is using the construction of transport infrastructure to create opportunities for high-value employment for women.<sup>10</sup> Respondents identified senior leadership as the most important contributing factor for this focus, and they attributed the continuity of the focus to the gender consultants working in transportation and to the specific gender focal points in the Transportation Division.

### Text Mining Results:

#### IDB-Financed Projects and IDB Country Strategies

In addition to qualitative interviews with Bank professionals and borrowing country counterparts, we examined IDB-financed operations, including sovereign-guaranteed loans, technical cooperation agreements, and Country Strategies that define the relationship and the programs undertaken using Bank funds. These agreements are the cornerstone of the Bank's operations in borrowing countries, and the incorporation of gender as a cross-cutting strategic priority should clearly be reflected in the language used to outline project parameters.

Given the large number of documents and the importance of understanding relationships across sectors, we sought out a way to automate the examination of each of the Bank's project documents that would complement the analysis already undertaken by the GDI. To that end we developed a text-mining project and compared the results to existing gender analysis of projects.

The starting point for the text-mining project is the fact that incorporating gender programming into a project document requires using language that references gender issues. With

that in mind, we created an algorithm in the **R** programming language that scans documents for a list of gender-related words and counts the number of occurrences of each word by paragraph.<sup>11</sup> We hypothesized that paragraphs with a higher density of gender-related words are more likely to be central to the gender components of each document, and documents where gender words are included in more paragraphs are more likely to include gender programming. We also tested the ability of the program to identify specific gender activities in Country Strategies. We find support for existing efforts to quantify gender mainstreaming in sovereign-guaranteed loans, but not for identifying the areas of work in a large amount of documents. We suggest ways in which the Bank could change data collection processes to better assess whether we are meeting the expectations of borrowers and the mandate of the strategic plan.

For our analysis we used an algorithm that is able to download the documents from the IDB system and index keywords of interest in 1,870 documents in a fraction of the time that it would take to download and search for terms manually (potentially 1/100th of the time, by our estimate). To validate the usefulness of searching for keywords we compare the results of this analysis—the total number of paragraphs containing keywords per document—to the GDI ratings for each project. Since 2011, the GDI has been continuously monitoring the incorporation of gender in IDB-financed projects and Country Strategies.<sup>12</sup> Of the project documents rated, 571 overlap with the sample analyzed by the text-mining program.

The most appropriate model to compare our data to the GDI ratings is a maximum likelihood ordered logit model, which takes into account the discrete nature of the GDI ratings. Using that model we regress the log of the number of paragraphs containing gender words on the GDI ratings. The result predicts the exact GDI rating for 81 percent of documents, and we can pre-

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<sup>9</sup> Caldo et al. (2016).

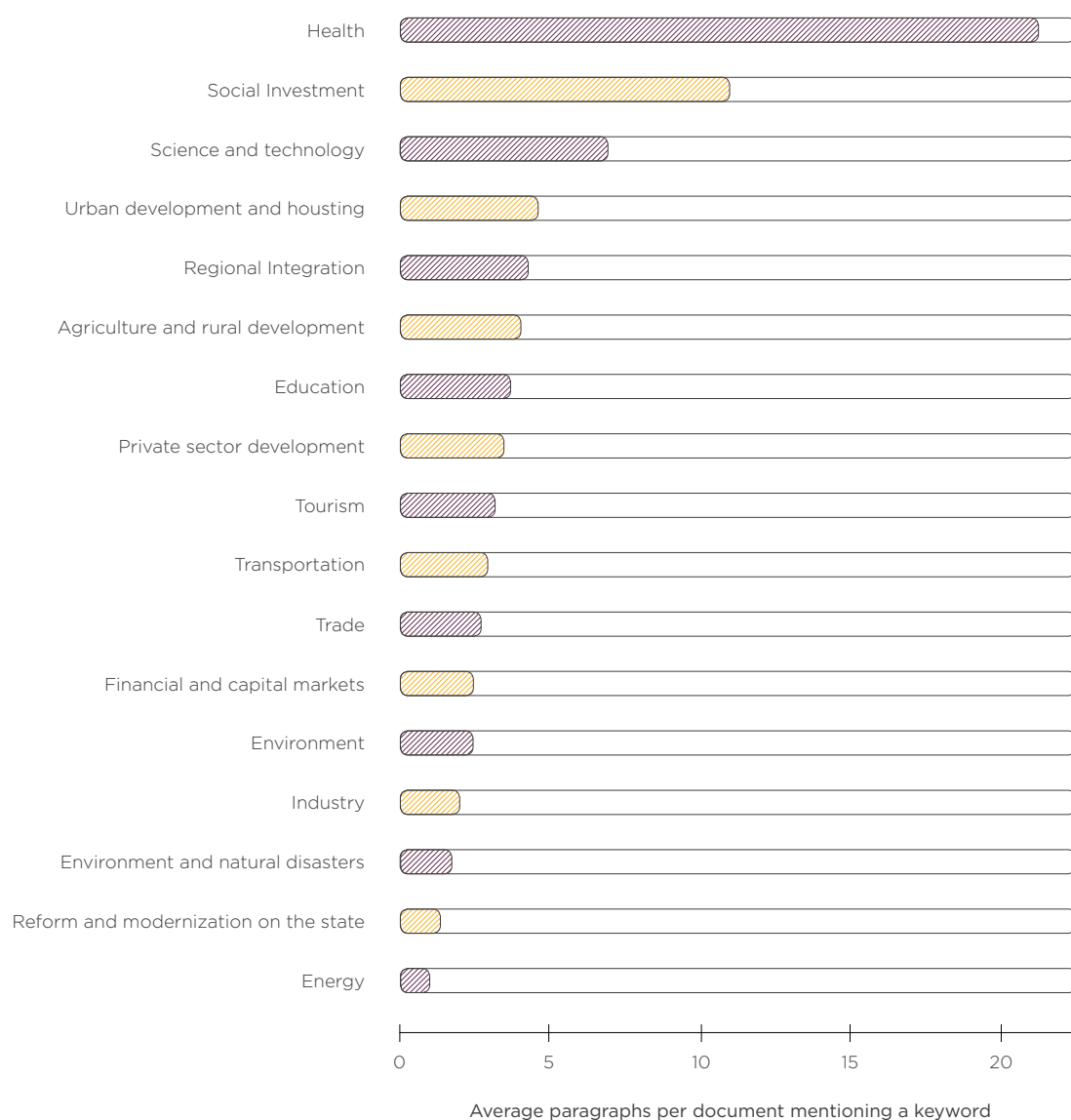
<sup>10</sup> See Technical Cooperation RG-T2618: Gender Perspective in the Construction of Transport Infrastructure, available at <http://www.iadb.org/en/projects/project-description-title,I303.html?id=RG-T2618>

<sup>11</sup> The complete list of gender-related words was provided by GDI.

<sup>12</sup> See the Gender Action Plan 2011–2013 for details on the IDB's methodology for monitoring gender mainstreaming in Country Strategies and projects.

**FIGURE 1. AVERAGE NUMBER OF PARAGRAPHS IN PROJECT DOCUMENTS CONTAINING GENDER TERMS (SOVEREIGN-GUARANTEED LOANS, BY SECTOR)**

*Source: Official IDB documents for sovereign-guaranteed loans approved from 2011 through 2015.*



## RESULTS FROM EACH METHOD

dict the rating within one ranking for 98 percent of documents. Given this success rate we conclude that the number of paragraphs containing gender language is a reasonable measure of the incorporation of gender priorities into project documents.

Figure 1 presents the average number of paragraphs containing gender language across sectors. As expected, health and social investment contain the highest frequency of gender language. Science and technology and regional integration, along with urban development and housing, also have a high frequency compared with other sectors. Transportation, despite being near the median sector, has a very high frequency for a sector that has not traditionally been considered related to gender, perhaps reflecting gender mainstreaming efforts in that department revealed in the interview and focus group analysis.

One important expectation of this study is that, as a result of changes to the strategic framework, we should see increasing incorporation of gender language in recent years. Figure 2 presents the average number of paragraphs in loan documents that use gender language by year. The data clearly show major increases in the incorporation of gender in 2014 and 2015. Indeed, 50 percent more paragraphs in project documents include gender language in 2015 than in 2011. Figure 2 also shows that gender has been integrated into transportation projects at a greater rate, particularly within the last year. The result is consistent with the qualitative analysis, which found that transportation has been very successful in mainstreaming gender in the project planning process.

While gender mainstreaming means using the gender lens to approach solving development problems across all of the sectors in which the IDB operates, the GDI focuses on tackling five specific challenges to gender equality: adolescent pregnancy, reproductive and maternal health, violence against women, promotion of labor force participation and entrepreneurship, and women's voice and participation in governance.<sup>13</sup>

The text-mining analysis was applied to Country Strategies in 24 of the Bank's 26 borrowing member countries in October 2015 with the aim of identifying specific gender issues (e.g.,

violence against women, or economic empowerment) in order to match them with these sector priorities. The most frequently paired sectors with gender-related terms were health (particularly maternal health, but also teen pregnancy) and education. Terms related to violence against women, financial inclusion, labor markets, and vocational training were also found, but not as frequently.

For the most part, the text-mining results reflect an alignment between Country Strategies and these five focus areas. Education, maternal health, and teen pregnancy were the most frequent. Violence against women, women's voice and participation in governance, gender in relation to labor force participation, and entrepreneurship were also found, but not as frequently.

An additional lesson is the value of text-based automation procedures. While automation cannot replicate the qualitative analysis conducted by the GDI, it can greatly speed up the process. Electronically pre-processing documents would relieve analysts of the responsibility of scanning entire documents, allowing them to focus only on the areas that incorporate gender. Overall this would allow analysts to dedicate more time and effort to understanding and rating the impact of the gender components in the overall project context.

Our sectoral analysis highlights a disconnect between IDB sectors and subsectors and priority areas for gender programming (e.g., maternal health, violence against women). With current data we have no way of knowing how many projects address, for example, the issue of violence against women. An important priority for future GDI data-gathering could be qualitative categorization of gender efforts in projects. Tracking the extent to which sector projects actually work directly on issues like violence against women, as opposed to incorporating gender safeguards, would add depth to tracking data and help in the understanding of how IDB projects are responding to borrower needs.

### External Feedback System General Perception Survey

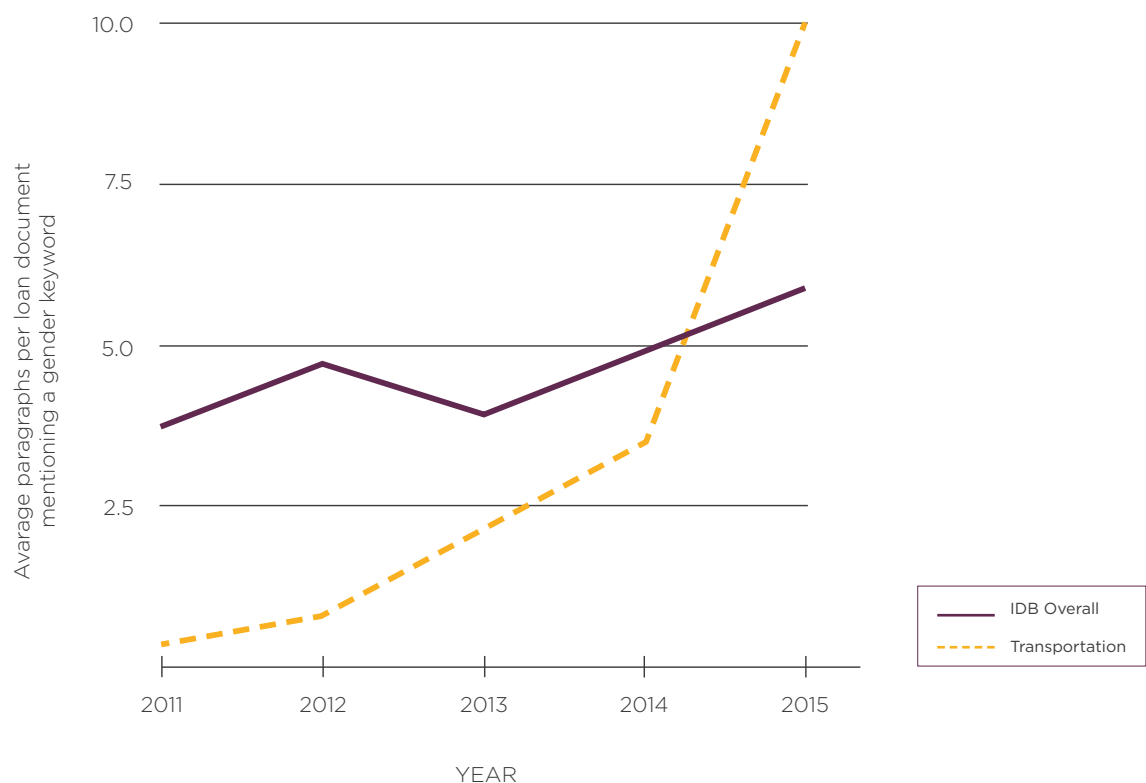
Through the IDB's 2013 GPS, a wide range of stakeholders are asked about their perceptions of the development priorities of

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<sup>13</sup> See the 2014 Gender and Diversity Sector Framework Document at <http://www.iadb.org/en/about-us/sector-policies,6194.html>

**FIGURE 2. AVERAGE NUMBER OF PARAGRAPHS CONTAINING GENDER TERMS  
(SOVEREIGN-GUARANTEED LOANS, BY YEAR)**

*Source: Official IDB documents for sovereign-guaranteed loan projects approved from 2011 through 2015.*



➔ An additional lesson is the value of text-based automation procedures. While automation cannot replicate the qualitative analysis conducted by GDI, it can greatly speed up the process.

Electronically pre-processing documents would relieve analysts of the responsibility of scanning documents and free up time to focus on ensuring project documents' incorporation of gender is significant and meaningful.

## RESULTS FROM EACH METHOD

borrowing member countries and of how well the IDB Group is helping to address them. In the 2013 GPS,<sup>14</sup> 959 of the responding stakeholders were asked about their perceptions regarding the importance of gender equality and women's empowerment for their countries,<sup>15</sup> and 70 percent responded that this issue is important or very important.<sup>16</sup> The share was significantly higher (76 percent) for respondents in countries that are part of the IDB's Country Department for Mexico and Central America (Belize, Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, and Panama) than for respondents in other countries. It was also significantly higher for respondents who indicated that they worked in civil society (77 percent) and for women (72 percent), but was lower for those working in the private sector (50 percent) and in public enterprises (46 percent).<sup>17</sup>

Approximately 43% of the Bank's stakeholders did not know what the Bank does regarding gender.



### Government

#### External Feedback System Programming Survey

In December 2015, 40 high-level officials who had represented their country during the programming process with the IDB in 2015, including Ministers of Finance and Planning, participated in the Programming Survey. As part of this survey they were asked about their perceptions of the importance of gender equality to their country's development agenda.

Most of these high-level officials (85 percent) indicated that gender equality was important for their country's development agenda, and most (88 percent) indicated that the most

important gender-related issue was violence against women. More than half of respondents (58 percent) also indicated that financial inclusion/access to credit, equal opportunities in labor markets, and equal access to education were important gender-related issues (Figure 3).

Interpreting the results from Figure 3 requires some additional context. Some priorities—such as education—reflect long-term points of emphasis. On education in particular, achievement among girls is consistently as high or higher than achievement for boys. Other issues, such as violence against women, reflect critical areas of concern where additional work is needed. Rather than thinking of this result as a list of policy objectives from countries, it is best considered as a window into the priorities of policymakers that can help the Bank gauge the region's appetite for gender-related programming across sectors.

High-level officials participating in the survey were most interested in the following IDB products and services related to gender: impact evaluations, piloting of innovative initiatives, and research on emerging sector gender issues (Figure 4). In 2014 alone, the IDB produced 22 Technical Notes and 13 other types of analytical products across different sectors, including nontraditional sectors.<sup>18</sup> Currently, the IDB has completed two impact evaluations, and is conducting eight more, specifically regarding violence against women.<sup>19</sup> The IDB should continue to communicate this body of knowledge.

#### Review of National Development Plans and National Gender Plans

The study also included a review of existing national development plans and national gender plans in 2015 (see Annex C). The review found 19 national gender plans for the 26 IDB borrowing member countries, 14 of which had specific targets related to gender. Of the 22 national development plans reviewed, 17 had at least one objective related to gender. A wide

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<sup>14</sup> More information regarding the 2013 GPS is available through the [IDB External Feedback System 2012-2014 Report](#).

<sup>15</sup> While 2,679 individuals participated in the 2013 GPS, only those 959 respondents who answered that social policy was the most important issue in their country were asked about the importance of gender and women's empowerment.

<sup>16</sup> The question asked was: How important [is gender equality and women's empowerment] for the sustainable development of your country?

<sup>17</sup> Significant at the 95% confidence level.

<sup>18</sup> See Annex III of the Annual Progress Report on the Implementation of the Gender Action Plan for Operations, 2014-2016.

<sup>19</sup> For more details see <http://idbdocs.iadb.org/wsdocs/getdocument.aspx?docnum=40090129>

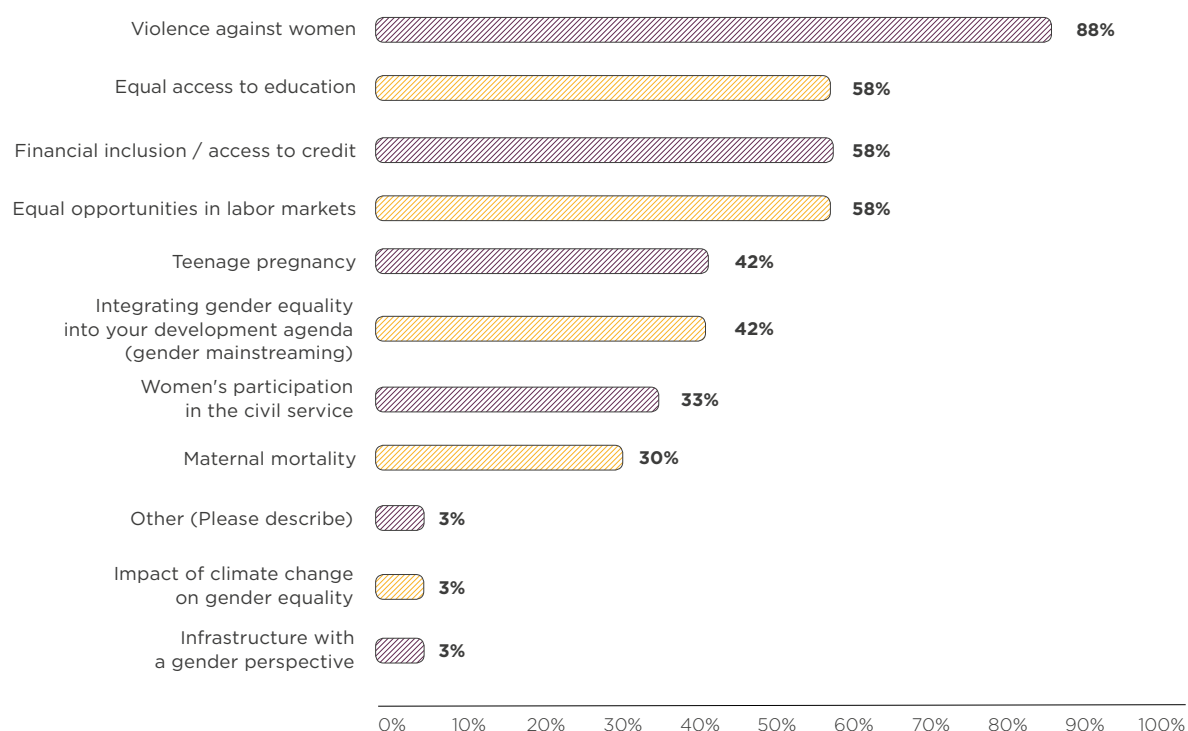


## GENDER MAINSTREAMING AT THE BANK

**FIGURE 3. HIGHEST PRIORITY GENDER-RELATED ISSUES FOR THEIR COUNTRY'S DEVELOPMENT AGENDA ACCORDING TO HIGH-LEVEL OFFICIALS (PERCENT)**

Source: IDB External Feedback System Programming Survey 2015.

Note: The question asked was: What are the highest priority issues related to gender in your country's development agenda? (Please check all that apply). Options were randomized. Multiple answers were allowed, which is why percentages add to more than 100. n=35.

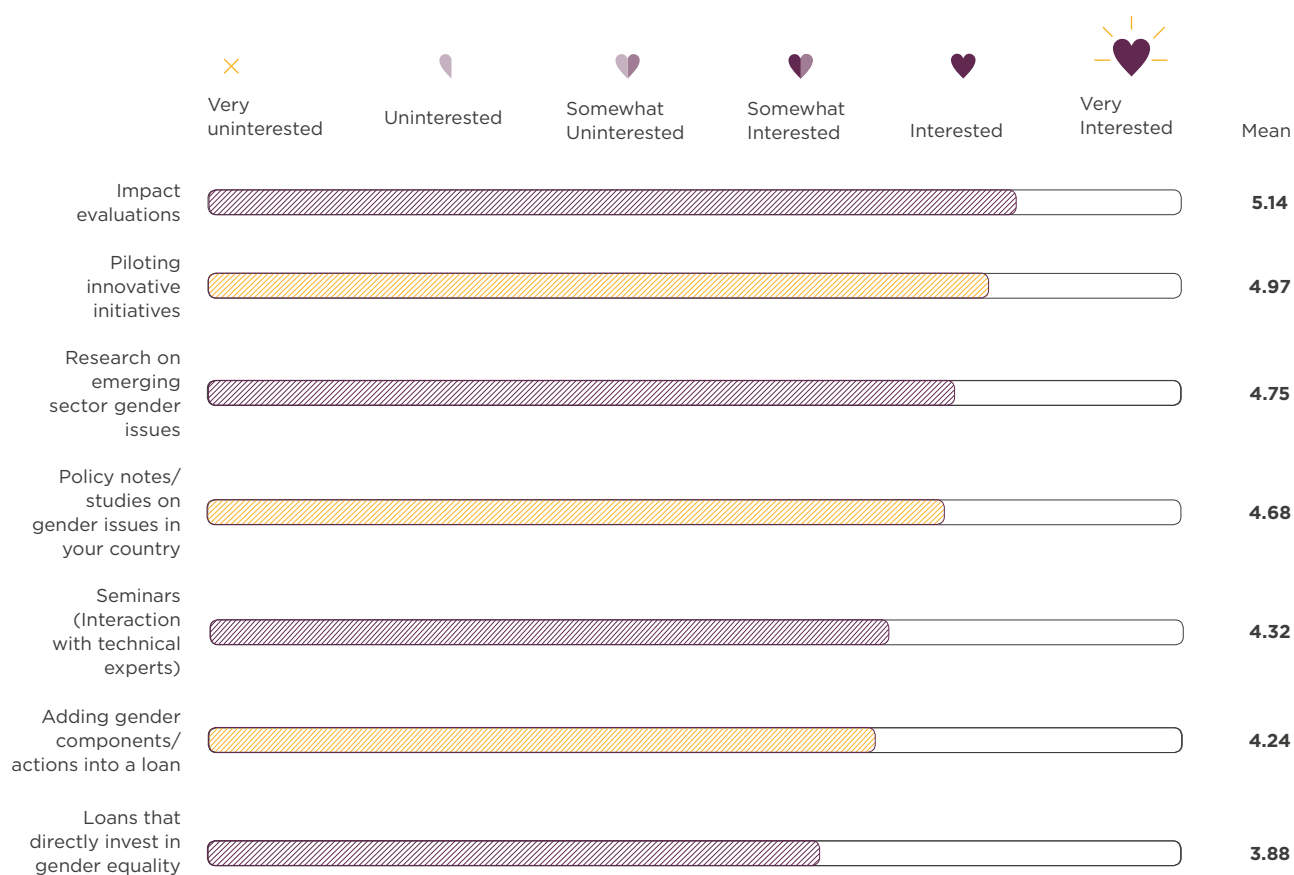


## RESULTS FROM EACH METHOD

**FIGURE 4. INTEREST IN TYPES OF SUPPORT THE IDB PROVIDES IN THE AREA OF GENDER EQUALITY (AVERAGE RESPONSE SCORE: 1-VERY UNINTERESTED; 6-VERY INTERESTED)**

Source: IDB External Feedback System Programming Survey 2015.

Note: The question asked was: To what degree is your country interested in the types of support the IDB provides in the area of gender equality? n=35.



range of gender-related activities were identified and classified by area. These included actions that had been taken and that included a gender perspective, or gender issues that were acknowledged in relation to goals in other areas—for example, the importance of good roads for securing the safe passage of women in labor to hospitals, as mentioned in the Guatemalan National Development Plan,<sup>20</sup> and the gender implications of the energy sector, such as “the relatively higher use of charcoal and fuel wood by female-headed households” mentioned in the Jamaican National Development Plan.<sup>21</sup>

As Figure 5 shows, the most frequently mentioned activities related to gender in national development plans were education and gender-based violence, followed by labor markets, political participation, and maternal health. These areas are consistent with the IDB’s five priority areas for advancing gender equality mentioned earlier. Gender activities in nontraditional sectors were also mentioned, but less frequently.

Many studies identify the need for gender mainstreaming across various sectors,<sup>22</sup> but as Figure 5 shows, governments are not mentioning specific actions regarding gender in nontraditional sectors in their national development plans.

### Public Institutions

According to the Economic Commission on Latin America and the Caribbean (ECLAC), national mechanisms for the advancement of women are important for mainstreaming gender within government.<sup>23</sup> The Platform for Action of the Fourth World Conference on Women sponsored by UN Women, states that the main task of such a mechanism is “to support government-wide mainstreaming of a gender-equality perspective in all policy areas.”<sup>24</sup> A review of ECLAC’s *Level within Govern-*

*mental Hierarchy of National Mechanisms for the Advancement of Women*<sup>25</sup> finds that many such national mechanisms in the Region were operating at a high level at the time of ECLAC’s assessment.

As part of government, and in their role in gender mainstreaming within government, these national mechanisms are natural partners for the IDB, particularly in terms of mainstreaming efforts. According to ECLAC’s assessment, 50 percent of the mechanisms in LAC potentially have significant leverage within government, as they are either ministries, or their leaders have ministerial standing (Table 2). No information was found, however, regarding the actual effectiveness of these mechanisms on gender mainstreaming.

### Availability and Use of Gender Data

As mentioned in the interviews and the focus group, data are important for the inclusion of gender issues in specific projects and Country Strategies. This conclusion is supported by a recent study by the Center for Global Development.<sup>26</sup> The need for more gender-disaggregated data to advance specific development topics such as financial inclusion of women has also been highlighted by the IDB.<sup>27</sup> This section examines the availability of country-level statistics related to gender and/or disaggregated by gender. We first consider statistics provided by international organizations such as the World Bank and the IDB; then turn to a more extensive review of the availability of official statistics conducted by the international nongovernmental organization Data Watch.

There is a growing number of initiatives aimed at helping close the gender data gap. In 2015, the Clinton Foundation released the data visualization site **NoCeilings.org**, which aggregates

20 See Guatemala’s national development plan *K’atun Nuestra Guatemala 2013* (page 190).

21 See Vision 2030 at *Jamaica National Development Plan* (page 178).

22 See Annex III of the Annual Progress Report on the Implementation of the Gender Action Plan for Operations, 2014–2016.

23 Expert Group Meeting on National Mechanisms, United Nations Division for the Advancement of Women and ECLAC, August–September 1998. Available at: <http://www.un.org/womenwatch/daw/news/natlmach.htm> (accessed on 14 September 2016).

24 Fourth World Conference on Women, Beijing, September 1995. Available at: <http://www.un.org/womenwatch/daw/beijing/platform/institu.htm> (accessed on 14 September 2016).

25 See the Gender Equality Observatory for Latin America and the Caribbean at <http://oig.cepal.org/en/indicators/level-within-governmental-hierarchy-national-mechanisms-advancement-women> (accessed on 7 November 2016).

26 Kenny and O’Donnell (2016).

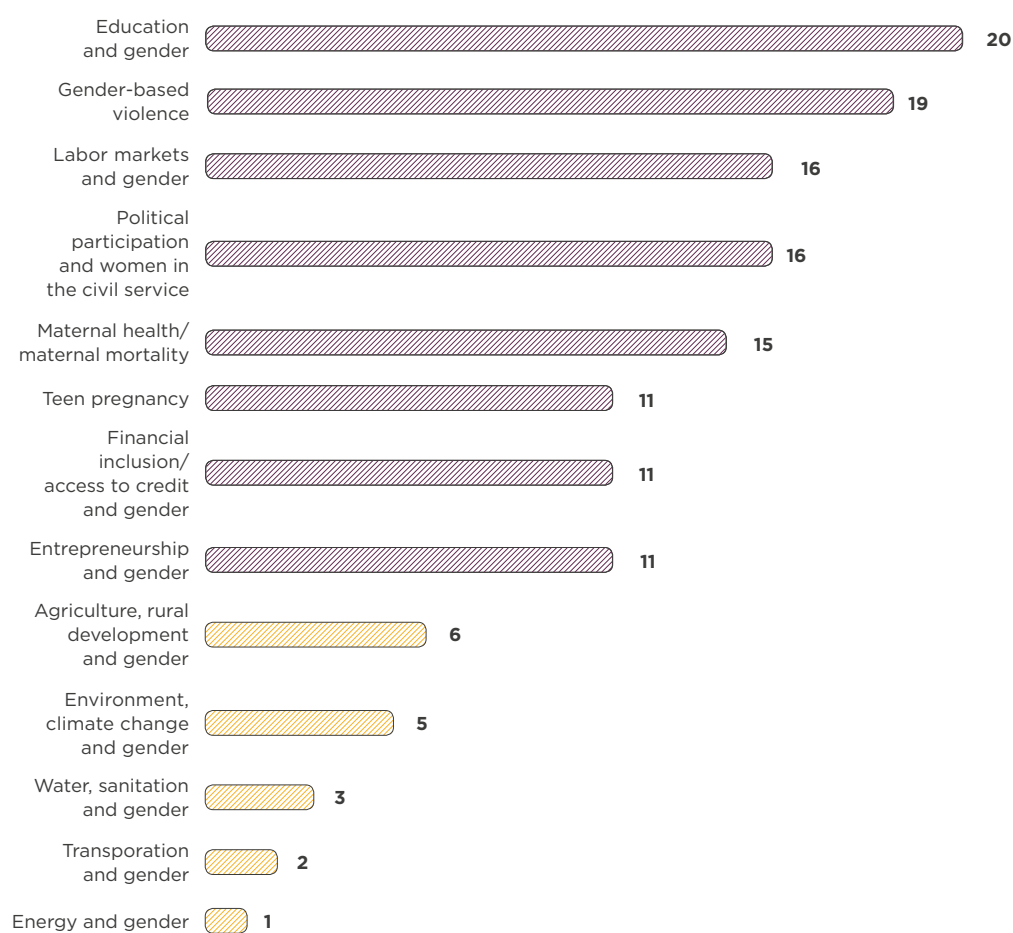
27 Pailhé (2015).

## RESULTS FROM EACH METHOD

**FIGURE 5. NUMBER OF NATIONAL DEVELOPMENT PLANS THAT MENTION SPECIFIC ACTIVITIES INCORPORATING A GENDER PERSPECTIVE**

Source: October 2015 review of 22 national development plans in IDB borrowing member countries. See Annex C for a list of plans reviewed.

Note: Nontraditional sectors are in orange.



**TABLE 2. LEVEL WITHIN GOVERNMENTAL HIERARCHY OF NATIONAL MECHANISMS FOR THE ADVANCEMENT OF WOMEN (PERCENT OF COUNTRIES WITHIN THE REGION)**

Source: Economic Commission on Latin America and the Caribbean;

see United Nations Gender Equality Observatory for Latin America and the Caribbean.

IBD COUNTRY GROUP	LOW	MEDIUM	HIGH
Andean countries	20	40	40
Caribbean and Haiti	75	0	25
Central America and Mexico	25	0	75
Southern Cone	40	0	60

and analyzes new and existing global gender-related data.<sup>28</sup> In 2016, the Bill and Melinda Gates Foundation announced an \$80 million commitment that includes filling critical gender data gaps and improving the accuracy and reliability of data collection, among other key activities, to improve gender data.<sup>29</sup> In September 2016, the International Monetary Fund pledged to strengthen policy advice and analysis and to decrease gaps in data to support the inclusion of women in labor markets.<sup>30</sup> In addition, there are initiatives, such as the United Nations' **data2x**, to coordinate efforts across institutions to increase gender data and conduct thorough assessments of the availability and quality of data. It is likely that more institutions and governments will join this movement. The 2030 Sustain-

able Development Goals agenda calls for a "data revolution"<sup>31</sup> to address gaps in the collection and quality of data, particularly disaggregated data, including by gender.<sup>32</sup>

We reviewed 1,235 country-level gender indicators that are made publicly available for LAC countries and across sectors through the **IDB's Numbers for Development dataset**, **World Bank data**, and **NoCeilings.org**. We also analyzed the assessment by Open Data Watch that provides a series of reports and measures data availability and accessibility.<sup>33</sup>

In 2015, Open Data Watch assessed the coverage and openness of official statistics in 125 mostly low- and middle-income coun-

<sup>28</sup> "The No Ceilings Initiative Releases its Full Participation Report and Data on the Status of Women and Girls through NoCeilings.org," Clinton Foundation Press Release, March 9, 2015. Available at: <https://www.clintonfoundation.org/press-releases/no-ceilings-initiative-releases-its-full-participation-report-and-data-status-women> (accessed on 16 September, 2016).

<sup>29</sup> "Gates Foundation Announces 80 Million Dollar Commitment to Closing Gender Data Gaps to Accelerate Progress for Women and Girls," Bill and Melinda Gates Foundation Press Release, May 17, 2016. Available at: <http://www.gatesfoundation.org/Media-Center/Press-Releases/2016/05/Gates-Foundation-Announces-80-Mill-Doll-Comm-Closing-Gender-Data-Gaps-Acc-Progress-for-Women-Girls> (accessed on 16 September, 2016).

<sup>30</sup> "IMF Managing Director Christine Lagarde Announces Specific Actions on Women's Economic Empowerment," International Monetary Fund Press Release 16/420, September 22, 2016. Available at: <http://www.imf.org/en/News/Articles/2016/09/22/PR16420-Lagarde-Announces-Specific-Actions-on-Womens-Economic-Empowerment> (accessed on 10 October, 2016).

<sup>31</sup> "Implementing 2030 Agenda Requires 'Data Revolution' to Address Gaps in Collection, Quality, Secretary-General Tells Development Committee, Urging New Partnerships," United Nations Meetings Coverage and Press Release SG/SM/17208-ENV/DEV/1589-STAT/454, October 10, 2015. Available at: <http://www.un.org/press/en/2015/sgsm17208.doc.htm> (accessed on 22 July 2016).

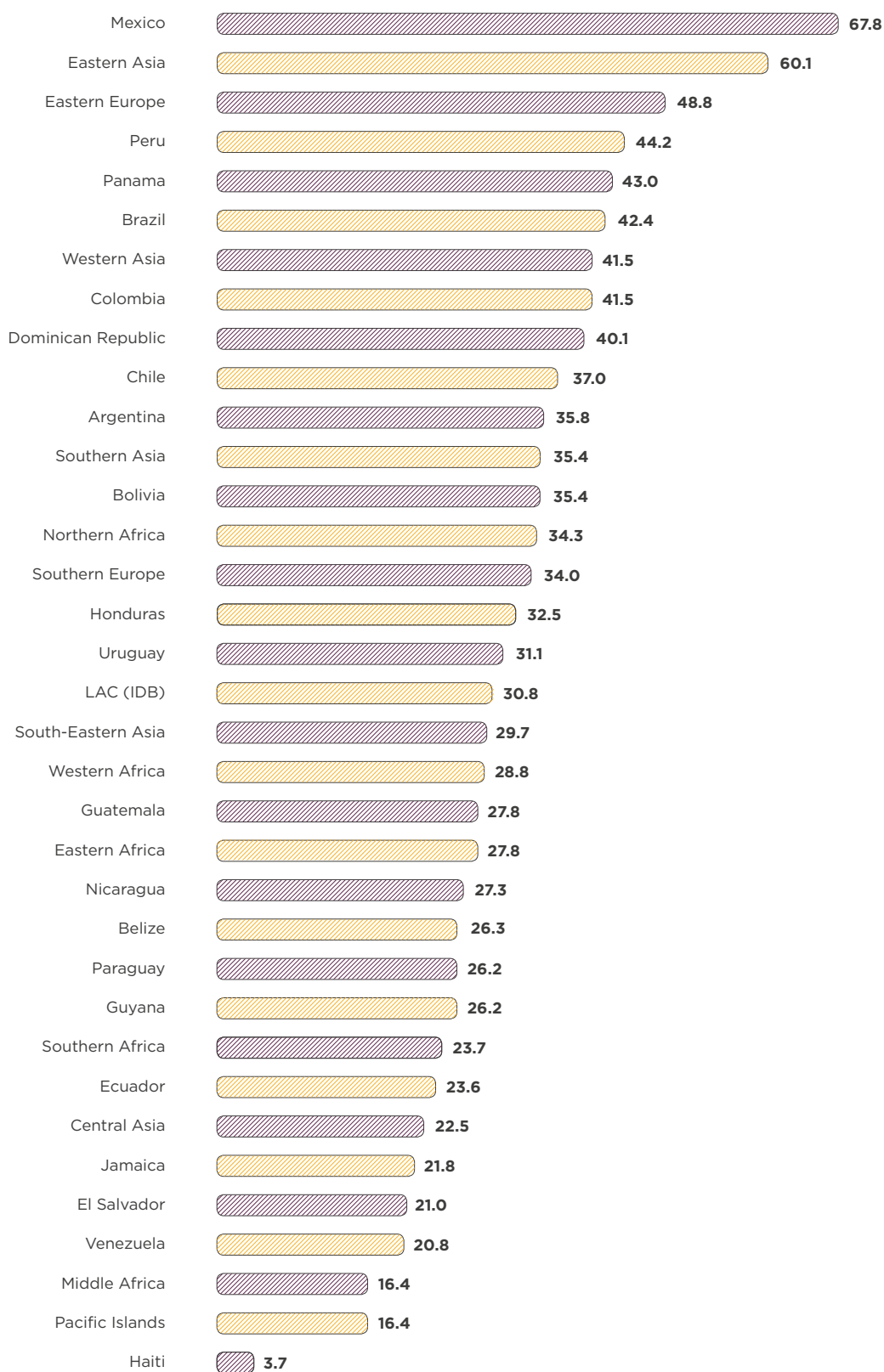
<sup>32</sup> See the 2030 Sustainable Development Goals Indicators and a Monitoring Framework website, available at <http://indicators.report/targets/10-2/> (accessed 16 September 2016).

<sup>33</sup> While ODIN measures the availability and accessibility of gender statistics, these reports are defined as "specialized studies of the status and condition of women; violence against women; women in parliament and management." We examine overall data scores for the region because we believe that this score includes disaggregation by gender beyond these specialized studies.

## RESULTS FROM EACH METHOD

**FIGURE 6. OPEN DATA INVENTORY OVERALL SCORES**

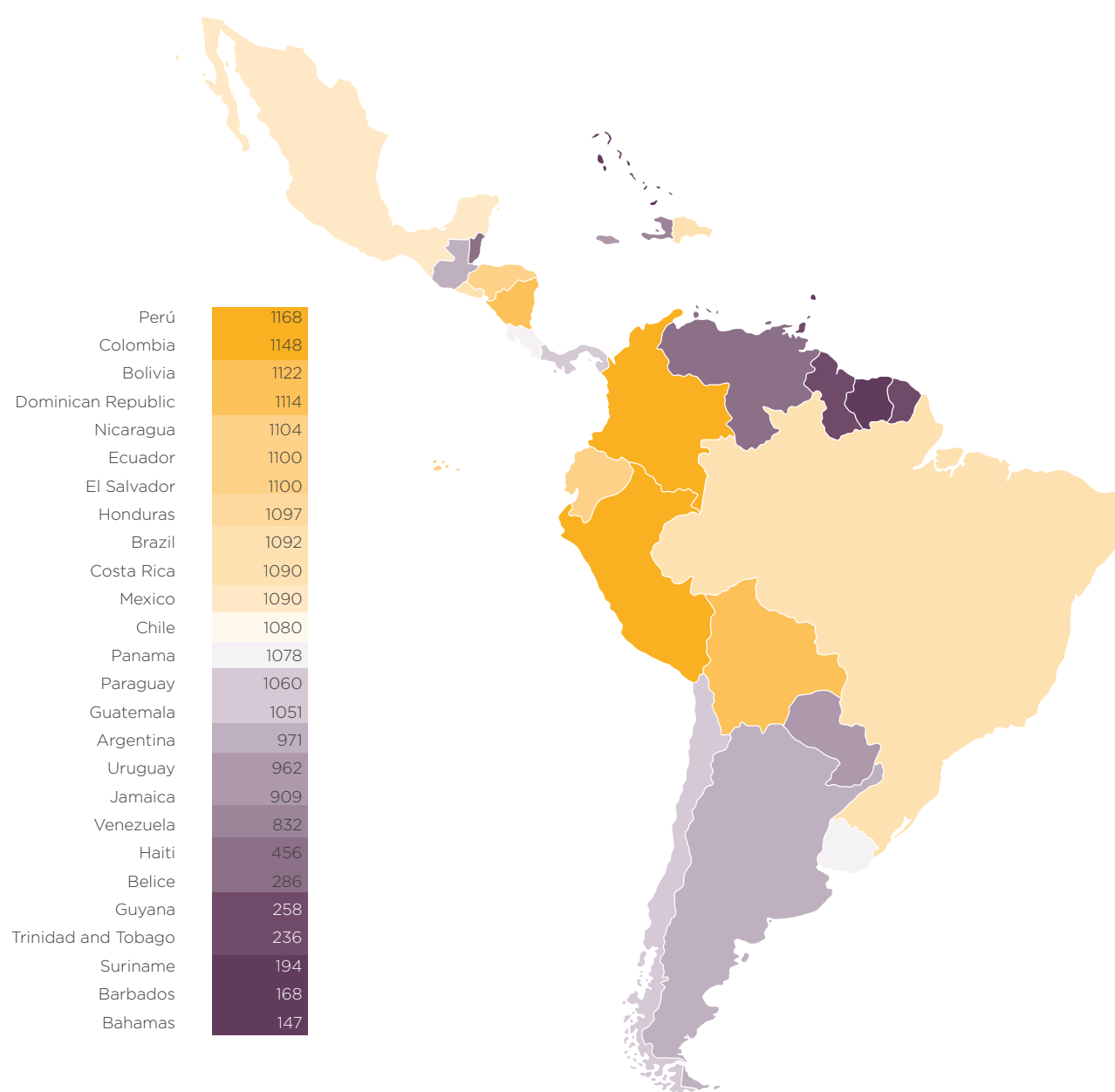
Source: Open Data Watch, Open Data Inventory. Available at: <http://www.opendatawatch.com>



**FIGURE 7. NUMBER OF INDICATORS DISAGGREGATED BY GENDER AVAILABLE BY COUNTRY**

Source: IDB review of 1,235 unique indicators disaggregated by gender currently collected by the World Bank, No Ceilings, the World Economic Forum, the Social Institutions and Gender Index of the Organization for Economic Cooperation and Development, and the World Values Survey (1981–2014) for each of the Bank's 26 borrowing member countries.

Note: Data must be available for at least one year for the indicator to be included.



tries<sup>34</sup> using the Open Data Inventory (ODIN) score methodology.<sup>35</sup> The overall score is a combination of two subscores. The Coverage Subscore (0-3.5) includes coverage and disaggregation (including disaggregation by gender), time coverage, and geographic coverage, and can be a proxy for data availability. The Openness Subscore (0-2.5) includes download format, metadata, and licensing terms and can be a proxy for data accessibility. Overall ODIN scores are shown in Figure 6.

The Coverage Subscore and Openness Subscore measures and the ODIN assessment, along with our own data review, found that data availability varies widely from country to country. There is a statistically significant correlation between data availability, provided by either measure, and the country's statistical capacity,<sup>36</sup> even when controlling for GDP and population. This constrains countries, particularly in the Caribbean, which can be seen in Figure 7.



## General Public

### Latinobarómetro

In 2016, the IDB commissioned Latinobarómetro to survey how citizens in Latin America perceive the importance of issues related to the three challenges and cross-cutting themes that anchor the Bank's Institutional Strategy. Respondents were asked to select from a list of the issues they felt were the most important for the development of their country.

While "gender equality" was identified by 32 percent of individuals and is not among the top options, it is important to note that two of the top three choices ("social inclusion" and "equal opportunities for all") can also have implications for

gender equality (Figure 8). Also of note is that the proportion of individuals who selected gender equality was higher among women and younger respondents.

There was a wide variation in responses across countries in terms of the proportion of individuals selecting gender equality as one of the most important topics for the development of their country; it was highest for Uruguay (48 percent) and lowest for Brazil (21 percent) (Figure 9).

### Social Media Analysis

There is an opportunity to form strategic alliances with key individuals in the region to communicate what the Bank is doing on gender-related issues.

During November and December 2015, the IDB carried out a pilot project in five countries (Argentina, Brazil, Colombia, Guatemala, and Mexico<sup>37</sup>) to understand if and how gender is spoken about in social media and to determine whether monitoring social media could yield suggestions for improving gender mainstreaming.<sup>38</sup> In spite of the limited scope of the pilot and the need to exercise appropriate caution when interpreting results of social media monitoring, the results offer a glimpse of the possibilities of using social media analysis to complement other analytical tools.<sup>39</sup>

Of more than 1 million conversations harvested from Twitter, Facebook, and blogs, roughly 320,000 (21 percent) were related to gender. Violence against women was the most frequently mentioned area (Figure 10), the most popular hashtags were related to campaigns against such violence (Figure 11), and the peak volume of gender-related content occurred on November 25, the International Day for the Elimination of Violence against Women (Figure 12).

Through a mixed methods design, the EFS results were analyzed with other data, including the results of in-depth inter-

<sup>34</sup> Open Data Watch (2015a).

<sup>35</sup> Open Data Watch (2015b).

<sup>36</sup> Correlations of  $p = 0.67$ , and  $r = 0.66$ , respectively. Significant at the 99 percent confidence level.

<sup>37</sup> Four of these countries—Argentina, Brazil, Colombia, and Mexico—have the Region's highest Facebook penetration rate, which was used as a proxy for social media penetration. See Internet World Stats, available at <http://www.internetworldstats.com/stats10.htm>

<sup>38</sup> Social media analysis has been used to aid decision-making; see Kostkova, Szomszor, and St. Louis (2014) and Yankelevich et al. (2016).

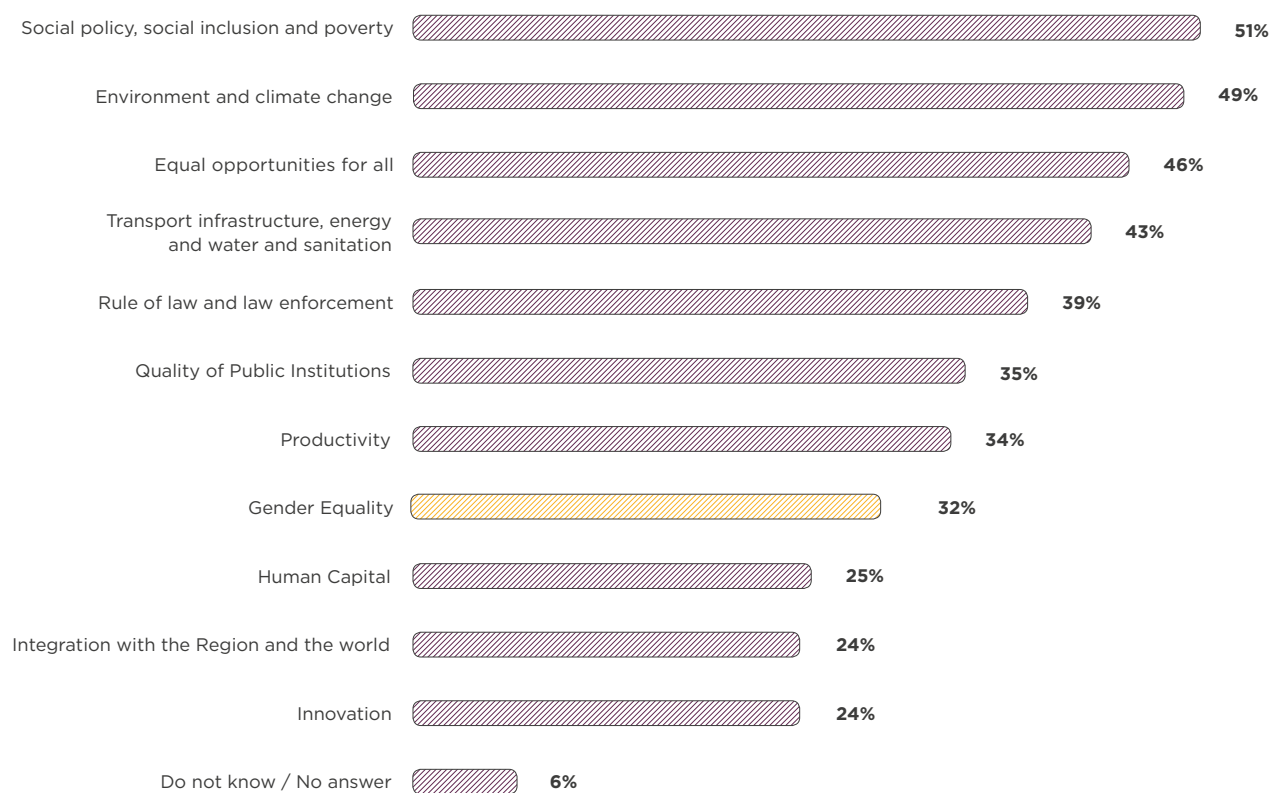
<sup>39</sup> Technical note detailing the social media study methodology is forthcoming.



**FIGURE 8. LATINOBARÓMETRO SURVEY: FROM THE FOLLOWING LIST OF TOPICS, WHICH ARE THE MOST IMPORTANT FOR THE DEVELOPMENT OF YOUR COUNTRY? (PERCENT)**

Source: Latinobarómetro (2016).

Note: The question asked was: From the following list of topics, which are the most important for the development of [your country]? Multiple answers were allowed, which is why percentages add to more than 100. n = 20,204.



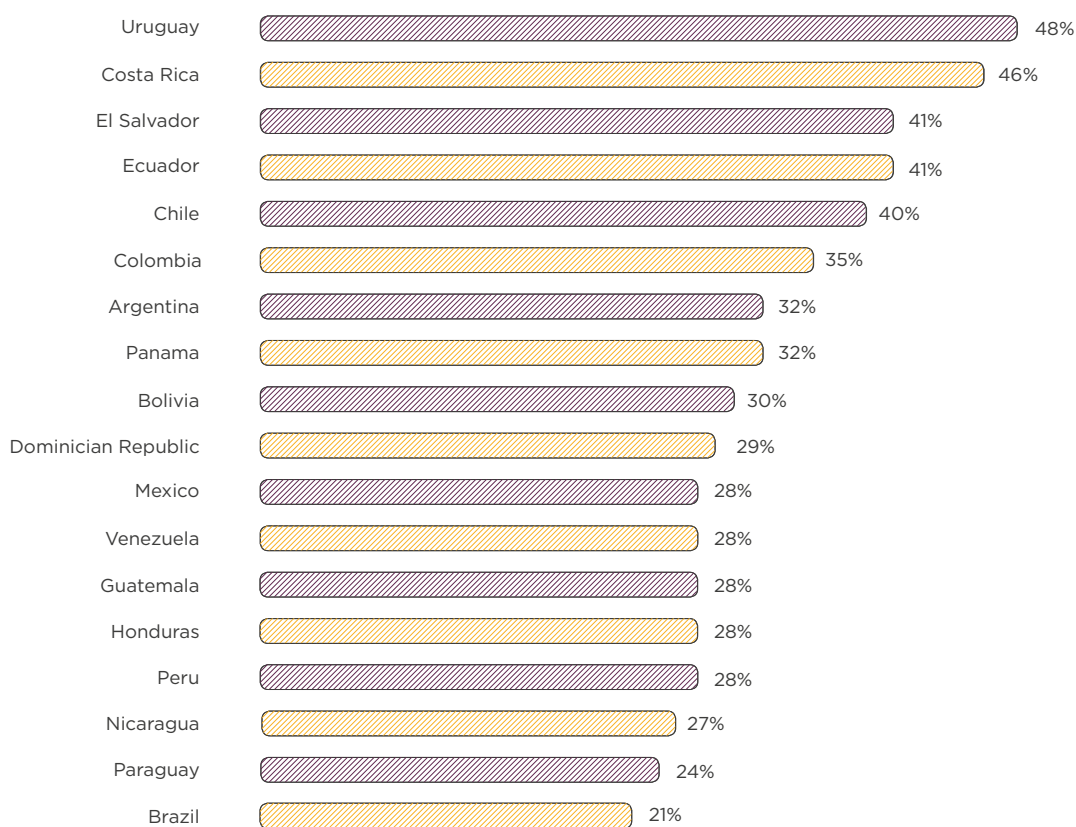
## RESULTS FROM EACH METHOD

**FIGURE 9. LATINOBARÓMETRO SURVEY: PERCENT OF RESPONDENTS WHO SELECTED GENDER EQUALITY AS AMONG THE MOST IMPORTANT ISSUES FOR THE DEVELOPMENT OF THEIR COUNTRY (PERCENT)**

Source: Latinobarómetro (2016).

Note: The question asked was: From the following list of topics, which are the most important for the development of [your country]?

Multiple answers were allowed, which is why percentages add to more than 100. n = 20,204.



- Of over 1 million conversations harvested from Twitter, Facebook, and blogs, roughly 320,000 (21%) were related to gender.

Violence against women was the most frequently mentioned area (Figure 10), the most popular hashtags were related to campaigns against such violence (Figure 11), and the peak volume of gender-related content occurred on November 25, the International Day for the Elimination of Violence against Women (Figure 12).

**FIGURE 10. WHAT INDIVIDUALS ARE TALKING ABOUT ON SOCIAL MEDIA (PERCENT)**

*Source: IDB social media analysis in Argentina, Brazil, Guatemala, Colombia, and Mexico for November-December 2015.*

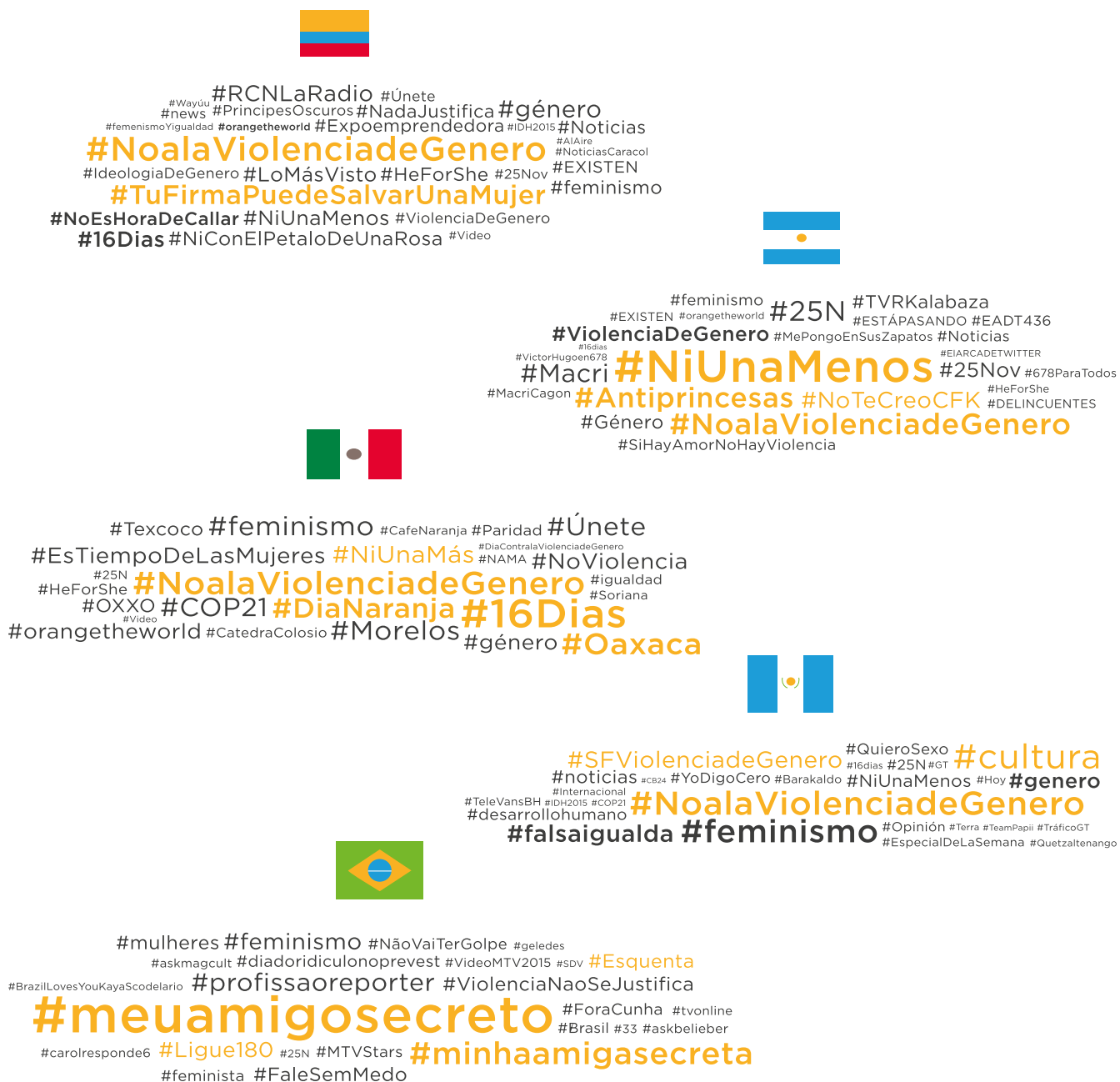
*Note: Responses not weighted.*



## RESULTS FROM EACH METHOD

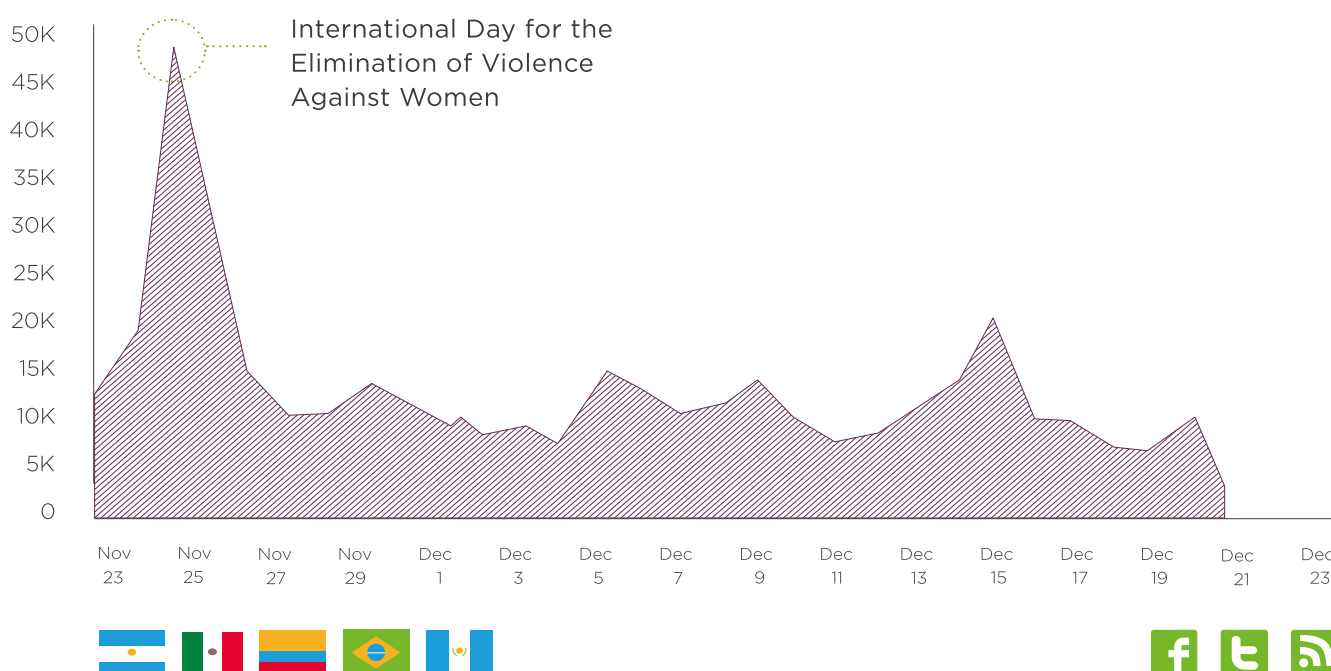
**FIGURE 11. TOP HASHTAGS RELATED TO THE VIOLENCE AGAINST WOMAN**

Source: IDB social media analysis in Argentina, Brazil, Guatemala, Colombia, and Mexico for November-December 2015.



**FIGURE 12. PEAK DATES OF CONVERSATIONS RELATING TO GENDER ON SOCIAL MEDIA**

Source: IDB social media analysis in Argentina, Brazil, Guatemala, Colombia, and Mexico covering November-December 2015.



views, a document review (e.g., national development plans), and social media analysis in the selected countries from November 23 to December 22, 2015. The resulting Technical Note is one of seven that detail the results of the social media analysis, including the methodology used, an individual report for each of the countries, and a comparative analysis that ties the country analyses together, along with the results of an Interactive Voice Response survey specifically designed to complement the social media analysis.

The social media monitoring pilot was later expanded to cover a full year (October 1, 2015 to September 31, 2016) for the five

countries explored in the pilot. Although the methodologies differed slightly from the pilot, the study confirmed that, on aggregate, violence against women is the key issue for these five countries, and that the peak date was November 25th.






Individuals and institutions that garnered attention in social media during the monitoring period included activists, journalists, CSOs, international organizations (particularly the United Nations), media outlets, celebrities, high-level government officials (senators, governors, congresspersons), political figures (including candidates), and national mechanisms for the advancement of women. These individuals and insti-

## RESULTS FROM EACH METHOD

**FIGURE 13. PERCENTAGE OF INTERACTIVE VOICE RESPONSE SURVEY RESPONDENTS IDENTIFYING TOP THREE GENDER-RELATED SUBTHEMES, BY COUNTRY**

Source: IDB External Feedback System Interactive Voice Response Survey, December-January 2016.

Note: The question asked was: Which of the following gender sub-themes should be the biggest priority for [your country]? National samples were selected probabilistically and represent the demographic distribution of country populations. Stratified random samples by country: Argentina (52,208), Brazil (78,811), Colombia, (71,584), Guatemala (47,823), Mexico (69,692). n = 320,183.

					
<b>Violence against women</b>	<b>46%</b>	<b>78%</b>	<b>52%</b>	<b>68%</b>	<b>40%</b>
Gender Identity	<b>23%</b>				
Teen Pregnancy	<b>20%</b>		<b>35%</b>		
Racism		<b>10%</b>		<b>11%</b>	<b>36%</b>
Gender Equality		<b>5%</b>	<b>10%</b>	<b>14%</b>	<b>18%</b>

tutions are highly visible in social media and care about gender equality. Along with key influencers, they can potentially become partners for advancing the gender equality agenda in the Region, particularly organizations whose messaging is a good fit with the IDB's focus areas and that have clear complementary areas of expertise. For example, UN Women was found to be one of the main influencers on Twitter and Facebook across the five countries examined in the social media analysis. According to the IDB's Gender Sector Framework Document, UN Women's "Safe Cities for Women" program addresses the issue of violence against women in public spaces, and an impact evaluation could help identify the effectiveness

of this program. A potential partnership might involve using the IDB's expertise to conduct an impact evaluation of the "Safe Cities for Women" program to determine its effectiveness and leverage UN Women's presence in social media to disseminate results.

### Interactive Voice Response

Over 1 million homes were called in the five countries where the social media study was conducted to participate in an Interactive Voice Response (IVR) survey. Over half of the 320,183 citizens who participated in the survey responded that gender equality should be one of the top five priorities for their coun-

<sup>40</sup> The question asked was: Should ensuring gender equality be one of the top five priorities for [your country]?

try.<sup>40</sup> The share was significantly higher for female respondents (62 percent)<sup>41</sup> and for Mexico (66 percent) and Guatemala (64 percent) than for the other countries (52 percent in Argentina, 54 percent in Brazil, and 58 percent in Colombia).

Respondents were also asked which of the gender subthemes should be the biggest priority for their countries. Violence against women was the key issue across all countries (Figure 13). It is important to note that IVR answers were not randomized, and violence against women was the first answer choice for this question. The IVR was used to validate the findings of the social media study with a broader audience.



## Civil Society Organizations

### External Feedback System

#### Civil Society Organization Survey

In December 2015, 118 representatives from civil society working on gender issues<sup>42</sup> participated in the 2015 EFS CSO Survey to identify the three most important gender-re-

lated issues in their country and the three organizations or individuals they perceived to be at the forefront of gender issues. Some of these actors are also influential beyond social media. For example, CSOs can have a potentially large influence because they are consulted during the preparation of IDB Country Strategies and projects. Some CSOs may organize movements to influence government policy relating to gender.

For these respondents, the most important gender-related issues were economic empowerment and financial inclusion of women, gender-based violence, and women's leadership and decision-making power. They mentioned a wide range of individuals and organizations at the forefront of gender issues, including activists, research centers and researchers, businesswomen, doctors, politicians, government agencies (particularly national mechanism for the advancement of women, which are the entities advancing gender mainstreaming in government; see page 4), and international institutions, such as the United Nations (particularly the United Nations Development Programme and UN Women, but also UNICEF, ECLAC, and the United Nations Population Fund), the Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ), the European Union, and Oxfam.<sup>43</sup>

<sup>41</sup> Statistically significant difference Pearson's Chi-squared test with Yates' continuity correction. Pearson chi2(1) = 1.1e+03 Pr = 0.000

<sup>42</sup> ConSOCs and key representatives from organizations involved in gender equality identified by the IDB (see Annex A for more details on the methodology).

<sup>43</sup> These institutions were identified by individuals in more than one country.





# 5

## BRINGING IT ALL TOGETHER





Gender Champion

**Rafael Rodríguez-Balza**

Operations Senior Advisor, Social Sector, IDB.

In response to the update to the IDB's Institutional Strategy to include gender as a cross-cutting priority, this study seeks to systematically examine how the Bank incorporates gender into projects and Country Strategies; how the Bank's external partners and stakeholders view the importance of gender; and how the Bank's programming reflects the larger conversation on gender issues among governments, activists, and citizens. We collected and summarized data from a wide variety of sources with the goal of identifying opportunities to improve the incorporation of gender as a cross-cutting priority and better address the specific programming needs of borrowing countries.

Table 3 summarizes some of the important indicators by sub-region. From the analysis, the following opportunities can be identified:

- The interest of high-level government officials regarding impact evaluations, and their perception that violence against women is a critical area, points to an opportunity to emphasize communication of these knowledge products.
- Even though a country may prioritize gender issues in its national development plan, or have established national mechanisms to promote gender issues, it may not seek IDB support to address those issues. One important result stemming from the General Perception Survey in 2013 was the high level of respondents who did not know about the Bank's work in this area (43 percent of the 959 respondents considered).
- Social media presents an opportunity to identify individuals who are championing gender issues and are also highly influential, and therefore could be excellent partners for communicating activities on gender mainstreaming on Twitter, Facebook, and blogs. Among these individuals are government officials and national mechanisms for the advancement of women.
- The peak time to communicate through social media about gender is November 25th, which is the International Day for the Elimination of Violence against Women.
- There is a relationship between statistical capacity and availability of gender-related data that could affect gender-disaggregation specifically on ongoing Bank projects.
- The interviews point to an opportunity to consider gender equality earlier in the project and Country Strategy preparation process at the Bank.
- The use of the text algorithm on IDB loans and Country Strategies pointed to an opportunity to classify the specific gender-related activities identified therein as a way to guide strategies for their design.

## BRINGING IT ALL TOGETHER

**TABLE 3. MIXED METHODS DATA SUMMARY FOR FOUR SUBREGIONS AND HAITI**

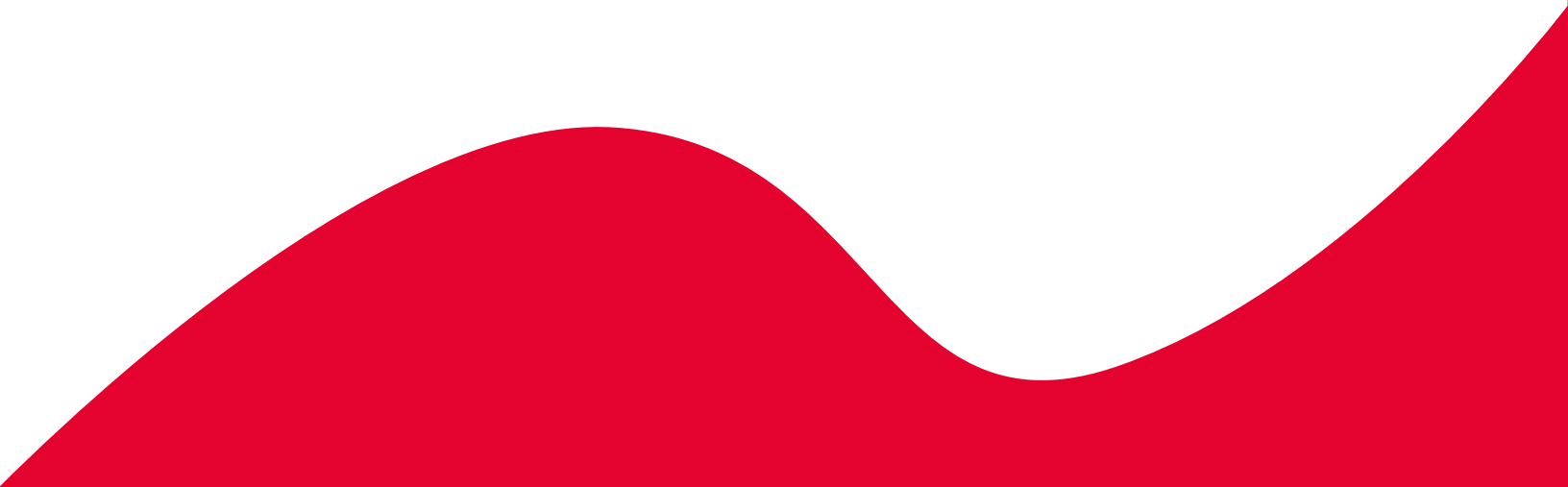
Sources: With the exception of the national machineries data from ECLAC and the Open Data Inventory from Open Data Watch, all data were sourced by the IDB.

Note: External Feedback System results with fewer than three survey respondents are not published. Data are not available (n.a.) for some countries (see Annex B).

	ANDEAN	CARIBBEAN	HAITI	CENTRAL AMERICA AND MEXICO	SOUTHERN CONE
Percent of gender-related results, 2011–2014	24	27	17	36	18
National development plans (percent with gender as a specific objective)	80	29	0	63	60
National gender plans (percent available)	100	100	0	75	80
Level within Governmental Hierarchy of National Machineries for the Advancement of Women (Source: Economic Commission on Latin America and the Caribbean - ECLAC)	2.20	1.29	3.00	2.50	2.20
Programming - Gender as a priority for country (percent of respondents)	100	63	n.a.	94	100
Question in the External Feedback System General Perception Survey, 2013 on whether gender equality is important to country's sustainable development (percent of respondents)	71	63	65	76	63
Latinobarómetro results, 2016: Gender equality as important for development in country (percent of respondents)	33	n.a.	n.a.	32	33
Open Data Inventory - Gender statistics coverage	1.3	1.0	0.0	1.7	1.4
Open Data Inventory - Gender statistics openness	1.2	0.7	0.0	1.0	0.7
Number of gender indicators observed	1,067	318	456	995	1,026
Indicators observed as a percentage of the 1,235 reviewed in total	86	26	37	81	83

# 6

# RECOMMENDATIONS





Gender Champion

**Melissa Maria Laura Gonzalez**

Operations Analyst, Institutional Capacity of State Division, IDB.



→ Make the most of the alignment between the Region's priorities and the IDB's gender equality focus areas by ensuring consistency in IDB products and increasing communication efforts.

Policymakers and citizens in the Region consider gender equality to be important for development, and the areas considered most important are consistent with the five areas prioritized by the IDB's Gender Sector Framework document and **Operational Policy on Gender Equality in Development**: violence against women, adolescent pregnancy, reproductive and maternal health, violence against women, promotion of labor force participation and entrepreneurship, and women's voice and participation in governance.. This is reflected not only in the results of various perception surveys and social media conversations, but also in the number of related activities promoted by national development plans in IDB member countries. However these areas are not always included in Country Strategies, and some areas are incorporated more than others into projects. Therefore, efforts should be made to:

- Ensure that these five priority areas are more consistently included during the design phase of Country Strategies and projects by mobilizing key individuals who can raise these issues in a strategic or project-specific way early on in the process (e.g., during Eligibility Review Meetings for sovereign-guaranteed loan projects).
- Continue supporting key individuals and, in particular, provide specific training and support to gender focal points.
- Leverage the text-mining algorithm to continuously monitor the activities of national development plans and IDB-supported activities.

- Explore the possibility of developing automated text classifiers to track the specific gender policy areas addressed in each IDB document (e.g., track areas of mainstreaming in such areas as education, labor, and violence against women).
- Use the Gender Dashboard to identify key issues that can be used to inform country and sector dialogue.
- Communicate the IDB's work on promoting gender equality and preventing violence against women, particularly impact evaluations and knowledge products (which are the products our partners are most interested in). This can be done by partnering with social media influencers identified who already have a strong presence in social media and whose work is highly aligned with that of the Bank (e.g., UN Women), and by leveraging new technologies such as the text-mining algorithm to help monitor communications such as IDB blogs.
- Continue assessing the alignment between the priorities of the IDB and the Region regarding gender mainstreaming through the Bank's External Feedback System.



For gender mainstreaming efforts in nontraditional sectors, activate leadership, mobilize key individuals earlier, communicate the existing body of knowledge, and expand partnerships for communicating results.

## RECOMMENDATIONS

The analyses of national development plan, operations, and surveys showed that there are still challenges to gender mainstreaming in what qualitative research participants categorize as “nontraditional” sectors (e.g., transportation, energy, water and sanitation, and climate change). However, there are examples where IDB-supported projects in these nontraditional sectors have successfully incorporated a gender perspective, most notably in transportation, thanks to strong leadership by the corresponding division and other key individuals within the Bank. Efforts should be made to:

- Mobilize senior leadership to ensure that they are engaged in efforts to increase gender mainstreaming in nontraditional sectors.
- Continue supporting key individuals, and, in particular, providing specific training and support to gender focal points within each of these sectors.
- Communicate knowledge products that have already been developed in nontraditional sectors by identifying key influencers and CSO leaders, once again capitalizing on the interest of countries in research on emerging sector issues.
- Help specialists in nontraditional sectors gain access to these indicators early in project and Country Strategy design processes to help make the case for gender in these areas (using the Gender Dashboard to do this with minimal cost to the project teams).
- Use the text algorithm to continuously watch for specific examples of how governments are focusing on gender in these areas, and communicate these examples to both project teams and government counterparts during the project and Country Strategy design process.
- Partner with national mechanisms for the advancement of women to mainstream gender, as these are the entities that can help mainstream these issues into government policies, and identify if efforts are required to strengthen the capacity and increase the effectiveness of these mechanisms.



Increase access to gender data by decreasing transaction costs, leveraging official statistics, and expanding partnerships for data dissemination, with a focus on the Caribbean.

Gender data are increasingly available, but there are still transaction costs to routinely acquire those data. In addition to country-level statistics sourced by international organizations, official statistics from countries could be a potential source of data, as most countries in Latin America have some gender data that are at least somewhat accessible. Caribbean countries have fewer national-level indicators, and because ODIN's assessment covered few Caribbean countries, the extent to which gender statistics for these countries exist or are made available is unclear. Efforts should be made to:

- Ensure that the Caribbean countries are prioritized in efforts to generate, increase access to, and evaluate the quality of gender data.
- Ensure that that analyses are broken down by subregion.
- Centralize data gathering, as with the Gender Dashboard, which can help create economies of scale and decrease transaction costs for teams.
- Continue supporting the use of official statistics, such as household surveys and census data, as a source of gender data.
- Make it easier to access existing analytical work, particularly impact evaluations related to gender and gender equality.

# 7

## NEXT STEPS



Gender Champion

**Shirley Margarita Canete Romero**

Specialist, Transport Division, IDB.

In recognizing the vital role that women play in improving the lives of their families, communities, and nations, the global development community made a commitment in 2015 to achieve gender equality and empower all women and girls by 2030. Months before that, the IDB Board of Governors reaffirmed the importance that gender equality plays in fulfilling the Bank's mission to promote inclusive and sustainable development throughout the Region by asking that special attention be placed on incorporating a gender perspective into the work of the IDB Group when addressing the Region's key development challenges of (i) social inclusion and equality, (ii) productivity and innovation, and (iii) economic integration.

Similar to the United Nations' 2030 Sustainable Development Agenda, the IDB's Institutional Strategy underscores the holistic nature of development and, consequently, the need for the institution to use a multidisciplinary and integrated approach when working with its borrowing member countries to identify and address their most pressing development challenges. In addition to gender equality, the Institutional Strategy determined that diversity, climate change and environmental sustainability, and institutional capacity and the rule of law should also be integrated both in the dialogue with our country counterparts and in the design of specific development interventions.

Work is already under way to replicate this study to cover the dimension of diversity and other cross-cutting themes. As development practitioners committed to continuously improving what we do and how we do it, studies like these and the tools that are used to produce them are essential.



# 9

## ANNEXES





Gender Champion

**Claudia Lugo**

Operations Senior Associate, Capital Markets and Financial Institutions Division, IDB.

## Annex A – External Feedback System Surveys

Since 2012, the IDB has systematically surveyed its external partners about a variety of Bank products and services to learn their opinions about what it does well and what areas need improving. Through the IDB's External Feedback System (EFS), the Bank has also been able to gain valuable insights from government, the private sector, academia, and civil society organizations (CSOs) on what the important development challenges are and how the Bank can contribute to addressing them. In 2015, specific questions related to gender mainstreaming were introduced in two of the survey instruments: one regarding the process by which the Bank and its country counterparts define the operations that receive Bank support (programming), and the other regarding the Bank's work directly with civil society. In 2016, questions relating to the perceived importance of gender equality for a country's development were introduced in the Latinobarómetro face-to-face interview questionnaire.<sup>1</sup>

Table A1 shows the four different EFS surveys were used to identify the importance given to gender at the country level and to determine high-level officials' interest in gender mainstreaming products.<sup>2</sup> The data indicate that gender is a priority for different stakeholder groups in LAC—citizens, govern-

ment officials, CSOs, academia, and the private sector—and that the IDB's five focus areas regarding gender equality, particularly violence against women, area a key area of concern.

### General Perception Survey

To provide a comprehensive understanding of stakeholder perspectives, the IDB engaged GlobeScan, an international research consultancy, to carry out the General Perception Survey (GPS) with high-level IDB stakeholders in both borrowing and non-borrowing member countries, regardless of whether they had previously used the Bank's products and services. Participants represent various organizations at different levels within governments, CSOs, the private sector, public enterprises, and both multilateral and bilateral development institutions.

The objective of the GPS is to identify views on current and emerging development priorities as well as perceptions of the IDB's strengths and weaknesses and its ability to support countries in addressing their unique development challenges.

### Composition of the 2013 EFS GPS Sample

Of the 2,679 stakeholders across the IDB's five country departments who participated in the 2013 GPS, only the 959 who answered that social policy was the most important is-

**TABLE A1 - SUMMARY OF EXTERNAL FEEDBACK SYSTEM INSTRUMENTS USED TO MEASURE INTEREST IN GENDER MAINSTREAMING**

EXTERNAL FEEDBACK SYSTEM INSTRUMENT	YEAR	AUDIENCE	NUMBER OF RESPONDENTS
Programming Survey	2015	High-level officials involved in programming processes	40
Civil Society Organization Survey	2015	Subsample of IDB Civil Society Consulting Groups and key civil society organizations that work in gender	118
General Perception Survey	2013	Subsample of IDB key stakeholders surveyed	959
Latinobarómetro	2016	Citizens	20,200

<sup>1</sup> Latinobarómetro uses a probabilistic sampling method in 18 Latin American countries. More information about Latinobarómetro's sampling methods is available at <http://www.latinobarometro.org/latContents.jsp>.

<sup>2</sup> Additional information on the EFS and the General Perception Survey is available at <https://publications.iadb.org/handle/11319/7248#sthash.pl49dYY0.dpuf>

sue in their country were asked about gender equality and women's empowerment. This report looks only at those 959 respondents in examining how GPS participants viewed the importance of "gender equality and women's empowerment" in their country, and whether there were differences by geographic location or respondent characteristics.

The [IDB External Feedback System 2012–2014 Report](#) gives additional details about the sample composition (page 69) and completion rates (page 70). The full questionnaire is provided on page 76 of the report.

### 2013 EFS GPS Survey Gender Questions

Question 8e. In [INSERT COUNTRY SELECTED] what do you think are the strategic priorities on which the IDB should focus? Respondents were asked to drag and drop their selections into a box. Then, rank them as 1 = Most important, 2 = Second most important, 3 = Third most important, 4 = Fourth most important, and 5 = Fifth most important

- Environment, climate change, renewable energy, and food security
- Infrastructure (e.g., transport, water and sanitation)
- Institutions (e.g., government, enterprises, citizen security, urban development, and financial markets)
- Regional and global integration (e.g., exports, trade)
- Social policy (e.g., education, health, social security, gender and diversity)

Respondents were asked to use the following rating scales for 8a-e: Importance in Country: Very important, Important, Somewhat important, Somewhat unimportant, Very unimportant, Don't know/Not applicable. IDB's contribution: Very high contribution, High contribution, Somewhat high contribution, Somewhat low contribution, Low contribution, Very low contribution, Don't know/Not applicable

Adjustment to climate change in water, agricultural, transport, and energy sectors

- Agriculture
- Biodiversity and environmental protection
- Climate change • Natural disaster risk management
- Natural resources and agricultural development
- Sustainable tourism
- Technologies for efficient energy use and renewable energies

Question 8e. Social Policy (asked only if "Social Policy" was selected as "Most Important" priority in Question 8.)

- Support for the development of indigenous peoples and Afro-descendants (respecting their culture and identity)
- Early childhood development
- **Promotion of gender equality and the empowerment of women**
- Formalization of the economy and labor markets
- Health network organizations (all levels of care) and performance (quality, efficiency, etc.)
- Health system financing
- Nutrition
- Public-private partnership in health
- Quality of education
- School-to-work transition
- Social protection systems
- Social security systems
- Teachers
- Technology in education

## 2015 Programming Survey

Through the 2015 EFS Programming Survey, high-level officials in the Region who were part of the programming process with the IDB were asked to share their perceptions of the importance of gender equality to their country's development agenda. The participants in the Programming Survey were 40 high-level officials, such as Ministers and Vice-Ministers of Finance and Planning, from 20 borrowing member countries.

As part of the EFS Gender study, an interdepartmental working group formulated three additional questions related to gender that were introduced into the 2015 EFS Annual Programming Survey. The goal of the questions was to capture the perceptions of high-level government officials regarding (i) the importance of gender equality to the development of their country, (ii) the topics related to gender that they felt were most important, and (iii) their interest in gender-related products and services provided by the IDB.

### EFS Programming Survey Gender Questions

#### 1. How important is gender equality to your country's development agenda?

- ☐ Not important (1)
- ☐ Somewhat important (2)
- ☐ Important (3)
- ☐ Very important (4)
- ☐ Don't know (5)

*Skip this question if answer to Q1 is "not important" or "don't know"*

#### 2. What are the highest priority issues related to gender equality in your country? (Please check all that apply)

- ☐ Equal access to education
- ☐ Violence against women
- ☐ Maternal mortality
- ☐ Teenage pregnancy
- ☐ Financial inclusion/access to credit
- ☐ Equal opportunities in labor markets
- ☐ Infrastructure with a gender perspective
- ☐ Impact of climate change on gender equality
- ☐ Women's participation in the civil service
- ☐ Integrating gender equality into your development agenda (gender mainstreaming)
- ☐ Other \_\_\_\_\_



Through the EFS, the IDB has systematically surveyed its external partners about a variety of Bank products and services to learn their opinions about what it does well and what areas need improving.

## ANNEXES

*Skip this question if answer to Q1 is "not important" or "don't know"*

### 3. To what degree is your country interested in the types of support the IDB provides in the area of gender equality?

RATING	VERY UNINTERESTED	UNINTERESTED	SOMEWHAT UNINTERESTED	SOMEWHAT INTERESTED	INTERESTED	VERY INTERESTED	DON'T KNOW
Loans that directly invest in gender equality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adding gender components/ actions into a sector loan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy notes/ studies on gender issues in your country	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Piloting innovative initiatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Impact evaluations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research on emerging sector gender issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seminars (Interaction with technical experts)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIGURE A1. EXTERNAL FEEDBACK SYSTEM PROGRAMMING SURVEY RESPONDENT PROFILE

COUNTRY	NUMBER OF RESPONDENTS
Argentina	1
Barbados	1
Belize	2
Chile	1
Colombia	2
Costa Rica	2
Ecuador	1
El Salvador	2
Guatemala	1
Guyana	2
Haiti	4
Honduras	2
Jamaica	2
Mexico	4
Nicaragua	1
Peru	5
Panama	3
Suriname	1
Trinidad & Tobago	2
Uruguay	1

SEX	FREQ (#)	% OF TOTAL
Male	24	60
Female	16	40
Other	0	0

BANK COUNTRY DEPARTMENT	NUMBER OF RESPONDENTS
Andean Group (CAN)	8
Caribbean (CCB)	8
Haiti (CDH)	4
Central America (CID)	17
Southern Cone (CSC)	3

	RESPONDED	INVITED	RESPONSE RATE
Number of respondents	40	82	49%

## 2015 Civil Society Organization Survey

During December 2015 and January 2016, the EFS invited 927 representatives from **Civil Society Consulting Groups** (Con-SOCs) and from key organizations<sup>3</sup> involved in gender and diversity issues to participate in the 2015 CSO Survey. Of the 390 individuals from 26 borrowing member countries who participated in the survey, 118 indicated that their organization addresses gender topics. They were asked three additional questions related to gender whose aim was to identify (i) the three most important issues in their country, (ii) the perceived level of the Bank's responsiveness to these three issues, and (iii) the most important groups and individuals relating to gender issues in their country.

### EFS Civil Society Organization Survey Gender Questions

#### Q1 What topics or issues are represented by your organization?

(Please select all that apply)

- ☐ Infrastructure and Environment (e.g. Climate Change, Renewable Energy, Biodiversity and environmental protection, Food Security, Transport, Water and Sanitation, Natural disaster risk management, Natural resources and agricultural development, etc.)
- ☐ Institutions (e.g. Citizen Security, Science, technology and innovation, Urban Development, Entrepreneurship, Small Business Development, Financial Markets, Open government, transparency and anti-corruption, etc.)
- ☐ Regional and Global Integration (e.g. Exports, Trade, etc.)
- ☐ Social Policy (e.g. Quality of Education, School to Work Transition, Teachers, Technology in education, Youth Development, Early Childhood Development, Health, Social Security, Indigenous Peoples, Afro-descendants, Gender and Diversity, etc.)
- ☐ Gender Equality
- ☐ Indigenous Peoples
- ☐ African Descendants
- ☐ Other (Please specify) \_\_\_\_\_

[The following three questions applied only to those who identified "Gender Equality" in Q1:]

#### Q2. In your opinion, which are the three most important issues in your country today regarding gender equality?

- ☐ Issue 1 \_\_\_\_\_
- ☐ Issue 2 \_\_\_\_\_
- ☐ Issue 3 \_\_\_\_\_

#### Q3. How effective do you believe the IDB is in helping address these issues?

	Issue 1 identified in Q2	Issue 2 identified in Q2	Issue 3 identified in Q2
Very Ineffective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ineffective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Somewhat Ineffective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Somewhat Effective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Very Effective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Don't Know (Unfamiliar With the IDB)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Don't Know (unfamiliar with IDB's work on this issue)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Q4. Please name three people, or organizations, that you believe are at the forefront of these issues in your country:

- ☐ Person/organization 1 \_\_\_\_\_
- ☐ Person/organization 2 \_\_\_\_\_
- ☐ Person/organization 3 \_\_\_\_\_

<sup>3</sup> As identified by the IDB's Gender and Diversity Division.

FIGURE A2. EXTERNAL FEEDBACK SYSTEM CIVIL SOCIETY ORGANIZATION SURVEY RESPONDENT PROFILE

COUNTRY	NUMBER OF RESPONDENTS
Argentina	3
Barbados	1
The Bahamas	5
Belize	3
Bolivia	3
Brazil	10
Chile	3
Colombia	1
Costa Rica	6
Dominican Republic	1
Ecuador	2
El Salvador	5
Guatemala	3
Guyana	4
Haiti	4
Honduras	11
Jamaica	7
Mexico	7
Nicaragua	8
Peru	5
Panama	3
Paraguay	3
Suriname	5
Trinidad & Tobago	4
Uruguay	8
Venezuela	3

	RESPONDED	INVITED	RESPONSE RATE
Number of respondents	390	927	42%

SEX	FREQ (#)	% OF TOTAL
Male	76	65.5
Female	39	33.6
Other	1	0.9

BANK COUNTRY DEPARTMENT	NUMBER OF RESPONDENTS
Andean Group (CAN)	14
Caribbean (CCB)	28
Haiti (CDH)	4
Central America (CID)	45
Southern Cone (CSC)	27



## Annex B - Qualitative Research Methodology

Two sets of interviews and a focus group were used to gain an in-depth understanding of the potential enablers of and challenges to gender mainstreaming at the Bank: (i) Informal interviews regarding gender mainstreaming in IDB-financed projects (32 participants); (ii) An online focus group platform to complement informal interviews (21 participants); and (iii) Formal semi-structured in-depth interviews regarding gender mainstreaming in Country Strategies (31 participants).

### Gender Mainstreaming in IDB-Financed Projects

During October and December 2015, 32 informal interviews with IDB staff and consultants were conducted to identify enablers and constraints in IDB-financed public and private sector projects across IDB departments. The interviews, conducted at the Bank's Washington, DC headquarters, lasted 30-45 minutes. Two main questions were asked: (i) Regarding your experience with projects that have included a gender perspective, can you tell me what were the main challenges and enablers to incorporating gender? and (ii) Regarding your experience with projects that did not include gender, why was a gender perspective not included? The results were compared with the 2011-2013 Gender Action Plan Evaluation, and with the "Knowledge and Learning Sector's Lessons" section from the GDI Operational Experience 2014.

These informal interviews were complemented by the Aha! virtual research platform during December 2015 and January 2016. Twenty-one individuals—both IDB team leaders and executing agency coordinators—from 10 IDB-financed projects in the public and private sectors across various IDB sectors and Latin American and Caribbean countries participated in this platform. The platform provided various instruments to capture participants' perceptions and experiences regarding gender mainstreaming in operations: traditional research instruments (e.g., open-ended questions) as well as avant-garde techniques such as prompting a reaction to images, phrases, and videos. Multiple-choice questions were also used to quantify general perceptions. The platform involved three days of

**TABLE B1. GDI RATING FOR COUNTRY STRATEGIES**

*Source: Annex III of the IDB Gender Action Plan 2014-2016.*

RATING	DEFINITION
NONE	<ul style="list-style-type: none"> <li>No reference to gender or women</li> </ul>
MINIMAL	<ul style="list-style-type: none"> <li>Brief mention of gender or women in the diagnostic/development challenges; and/or</li> <li>General reference to incorporating a "gender perspective" or "gender equality."</li> </ul>
PARTIAL	<ul style="list-style-type: none"> <li>Gender issues identified in the diagnostic/development challenges; and</li> <li>Specific actions / interventions proposed in at least one strategic focus areas.</li> </ul>
SIGNIFICANT	<ul style="list-style-type: none"> <li>Multiple gender issues identified in diagnostic/development challenges; and</li> <li>Specific actions incorporated into two or more strategic focus areas and the lending program.</li> </ul>
BEST PRACTICE	<ul style="list-style-type: none"> <li>Multiple gender issues identified in the diagnostic/development challenges;</li> <li>Specific actions incorporated into two or more strategic focus areas;</li> <li>Proposals for addressing a gender issues in the lending program; and</li> <li>Gender-specific indicators.</li> </ul>

interaction. Each day's activities took approximately 30 minutes to complete, and the online platform was open for three weeks in total.

### Gender Mainstreaming in Country Strategies

During December 2015, 31 in-depth interviews were conducted to identify the factors that positively (enablers) and negatively (constraints) influence gender mainstreaming during the process of developing a Country Strategy (see Box 1 in the

<sup>4</sup> Aha! is a next-generation online consumer research platform featuring a comprehensive suite of online qualitative research tools including social and mobile-friendly activities, storytelling, collage building, and community tools such as pinboards, wishing walls, and bulletin boards. For additional information go to <http://ahaonlineresearch.com/>

main text of this report). An interdepartmental working group selected eight Country Strategies of two types: (i) strategies in which gender topics were championed and successfully incorporated, and (ii) strategies in which gender topics were championed but were not incorporated.

**Definition of incorporating gender topics.** Since the IDB's first Gender Action Plan in 2011, the Gender and Diversity Division (GDI) has monitored how gender is incorporated into Country Strategies. Monitoring results are reflected in a five-point rating system: none, minimal, partial, significant, and best practice (Table B1). For the purposes of the in-depth interviews, successful incorporation of gender was defined as Country Strategies that identify specific gender issues in diagnostic/development challenges, and mention specific actions relating to gender. Therefore, using the GDI's rating, Country Strategies that have successfully incorporated gender have a rating of partial, significant, or best practice.

**Definition of championing gender.** Country Strategies were categorized as having championed gender if Gender Policy Notes and Gender Sector Notes were developed for that specific strategy, if there was a specific mention of gender in another Sector Note, or if a Country Development Challenge document was developed for that Country Strategy.

**Mix of cases.** To maximize the "variance" of perspectives, the sample included a case from each of the IDB's Country Departments. The sample also selected the most recent Country Strategies, which would be more present in respondents' minds.

**In-depth interview participants.** At least three individuals who were directly involved in the Country Strategy were chosen for each case. These interviews were complemented with interviews with individuals who often participate in Country Strategy processes, including government officials, Country Representatives, Country Strategy Coordinators, Country Coordinators, Country Economists, Operations Chiefs, Division Chiefs, advisors to the managers, private and public sector specialists, and GDI specialists. Of the 31 individuals inter-

viewed, 12 had been involved with Country Strategies that included gender, 15 with Country Strategies that did not include gender, and 4 with both types of cases.

Individuals were interviewed in person whenever possible. Seventeen interviews were conducted in person in Washington, DC,<sup>5</sup> and 14 were conducted via phone or video conference. Two senior external consultants with extensive experience in qualitative research—Miguel Gomez Winebrenner and Pedro Jose Fernandez Ayala—carried out the interviews.<sup>6</sup> With the support of the IDB's Paula Castillo Paez, these consultants and a third, Johana Gomez, developed a semi-structured discussion guide for the interviews.

### IDI Discussion Guide

**A discussion guide is meant to be a guide, not a script or a note-taking tool.** The purpose of this guide is to provide a roadmap to the moderator in terms of the key questions to probe into and the level of depth required per topic area. Given the exploratory nature of qualitative research, interviews may deviate from one topic to another depending on the interviewee's answers (and where those may lead) and style: some respondents tend to be very straightforward in their answers, while others may approach the question from different angles. This variation is especially visible in cross-cultural interviews.

### Probing Questions

Participants were asked the same questions, but probing questions were asked according to the answers given. Probing questions included:

- **WHEN** in the Country Strategy cycle were the gender equality issues introduced or blocked (or was this unknown)? The cycle may be specific to each case, but it may include the IDB Country Strategy team launch meeting at which the objectives of the IDB team are spelled out by the Country Representative and Country Economist to the specialists who will write policy notes, and the initial meeting at which sectors are selected for discussion with government.

<sup>5</sup> Many of the personnel usually based in IDB Country Offices were in Washington for end-of-year meetings.

<sup>6</sup> Only one interviewer was present at each interview.

- **HOW** it was introduced (policy notes, technical notes, initial meetings with government).
- By **WHOM** were the gender equality issues proposed or blocked? IDB (Country Representative, Country Coordinator, Country Economist, Country Strategy coordinators, GDI specialist, etc.; and/or government (counterpart, if so, ask counterpart the inner workings of government, following Mockus's [1994] theory of the cultural amphibian and Hauschildt and Schewe's [2000] concept of gatekeepers and process promoters).
- **WHY** were gender equality issues proposed or blocked? The why is explored through three lenses:<sup>7</sup> (i) moral norms (personal beliefs, concepts, understanding of what gender and incorporating gender means, good business case for development); (ii) cultural norms (incentives based on the expectations of others, intangible institutional norms, awards, recognition or chastising); and (iii) "legal" norms (policies, official rewards and punishment).

### I. Introduction: Providing Context

(Estimated duration: 2 - 3 minutes max.)

**Objective:** Explain ground rules & procedures, establish rapport & create context for discussion.

- 1.1 Greetings and warm-up.
- 1.2 Moderator introduces him/herself, explains the purpose of the interview and creates an adequate atmosphere for the discussion.
- 1.3 Taping & confidentiality.
- 1.4 Honest opinions. No right or wrong answers. We look for spontaneity and honesty.
- 1.5 Moderator is in no way connected to what will be discussed, so feel free to speak candidly..
- 1.6 **For spanish IDI's:** Although we will be having the discussion in Spanish, if certain words or expressions need to come out in English, feel free to let them do so.
- 1.7 Your opinion will be part of a broad set of opinions and your individual comments will not be exposed.

- 1.8 Respondent's introduction: Name, where they're from, & position
  - a. Position in the Bank (sector), length of time in the Bank, or
  - b. Position in Government and role in the Country Strategy

### 1.9 Role in the CS

## II. Gender Equality

(Estimated duration: 5 minutes)

**Objective:** To understand how stakeholders interpret the concept of gender as related to the Country Strategy, and to identify common elements in their interpretations.

- 2.1 When I say "gender equality within the context of country strategies" what comes to mind? Please elaborate.

- a. Probe for interpretations (mainstreaming, affirmative action, in the work place, combinations, etc.)

## III. Gender in the Country Strategy

(Estimated duration: 20-30 minutes depending on time booked with respondent)

- 3.1 I'm going to ask you some questions related to the Country Strategy with [country]

- a. *What was your role in this Country Strategy?*
- b. *On this line, can you indicate when the major milestones of Country Strategy [COUNTRY, Years] occurred?*
- c. *And in relation to these milestones, can you tell me when the subject of gender was introduced? Probe.*
- d. *Was it introduced at different times?*
  - i. *How was it introduced? Probe.*
    1. *Document. Which document? [See Cover Sheet to probe regarding specific documents]*
    2. *Dialogue.*

*For each time it was introduced*

- a. By whom?
  - i. *Self*
  - ii. *IDB*
  3. *Country Representative*

---

<sup>7</sup> Mockus (1994).

4. Country Coordinator
5. Country Strategy Coordinator
6. GDI specialist (IDB gender specialist)

III. *Government Counterpart*

IV. *Other, who?*

b. For what reason?

- I. *[Moral/Personal beliefs]:* gender good for development (intrinsically good) vs. evidence of gender good for development (good business case)
- II. *[Cultural norms]:* organization/supervisor encourages it
- III. *[Legal norms]:* it is required by the norms of the CS

3.2 Was the topic that incorporated into the final CS document?

a. *If yes, what do you think was successful about how it was incorporated? Probe.*

- I. Quality of the document/discussion
- II. Relevance
- III. People championing it (power, alliances, persuasiveness)

b. *If not, why do you think it was not incorporated?*

- I. When was it blocked? Please describe on timeframe
- II. How was it blocked?
- III. By whom?
- IV. What do you think motivated self/ these individuals to block it? Probe.

1. *[Moral/Personal beliefs]:* e.g., gender not critical to development
2. *[Cultural norms]:* e.g., organization/supervisor encourages it
3. *[Legal norms]:* e.g., it is required by the norms of the CS

v. Why was it not incorporated? Probe.

1. Did people not know about it? Was there awareness of this initiative?
2. Was it not clearly understood?

*\*Iterate questions for other instances when gender was introduced into the process. Ask whether these different instances are related to one another*

**3.3** Recap main issues and ask respondent to prioritize/rank order those elements that most contribute to making Gender unsuccessful

**3.4** Recap main issues and ask respondent to prioritize/rank order those elements that are most turn-key in making Gender successful

IV. *Close*

*(Estimated duration 2-3 minutes)*

Thank participants for thoughts and participation.



The purpose of this guide is to provide a roadmap to the moderator in terms of the key questions to probe into and the level of depth required per topic area. Given the exploratory nature of qualitative research, interviews may deviate from one topic to another depending on the interviewee's answers.

## Annex C – National Development Plans and National Gender Plans Reviewed

During October 2015, the team analyzed national development plans and national gender plans available for IDB borrowing member countries. This analysis included the identification of (i) gender-related objectives in national plans; (ii) categories of gender-related activities in national plans; (iii) availability

of national gender plans, and (iv) the number of national gender plans with measurable targets. The plans reviewed and analyzed for this study are listed in Tables C1 and C2.

**TABLE C1. NATIONAL GENDER PLANS REVIEWED**

COUNTRY	NATIONAL GENDER PLAN
Belize	The Revised National Gender Policy 2013
Bolivia	Bolivia National Plan for Equal Opportunities 2008
Brazil	Second National Plan of Women's Policies 2009
Chile	Plan for Equality and Opportunities 2011-2020
Colombia	National Gender Equality Public Policy 2013
Costa Rica	National Policy for Gender Equality and Equity 2007-2017
Dominican Republic	The Gender National Equity Plan 2007-2017
Ecuador	National Agenda for Women and Gender Equality
El Salvador	National Plan for the Equality and Equity of Salvadorian Women 2012
Guatemala	National Plan for the Promotion and Integral Development of Women, and Plan for Equity of Opportunities 2008-2023
Honduras	Plan for Gender Equality and Equity of Honduras
Jamaica	National Policy for Gender Equality 2011
Mexico	National Policy for Equality between Men and Women 2010
Peru	National Plan for Gender Equality 2012-2017
Panama	Public Policy of Equal Opportunities for Women
Paraguay	Third National Plan for Equal Opportunities between Men and Women 2008-2017
Trinidad and Tobago	National policy on gender and development republic of Trinidad and Tobago. The formulation process- Draft document
Uruguay	Third Gender Equality Plan
Venezuela	Plan for Gender Equality and Equity: Mama Rosa 2013-2019

TABLE C2. NATIONAL DEVELOPMENT PLANS REVIEWED

COUNTRY	NATIONAL DEVELOPMENT PLAN
Argentina	Argentina 2016: National Policy and Strategy for Development and Land Management
Barbados	The National Strategic Plan of Barbados 2005-2025
Belize	National Development Framework 2010-2030
Bolivia	Economic and Social Development Plan 2016-2020
Brazil	Plan Brazil
Colombia	National Development Plan 2014-2018
Costa Rica	National Development Plan 2015-2018
Dominican Republic	Base Document for the Proposal of the National Development Strategy 2010-2030
Ecuador	National Plan for Good Living 2013-2017
El Salvador	Five Year Development Plan 2014-2019
Guatemala	National Development Plan K'atun: our Guatemala 2032
Guyana	National Development Strategy
Honduras	Country Vision 2010-2038 and Nation Plan 2010-2022
Jamaica	National Development Plan: Vision 2030
Mexico	National Development Plan
Nicaragua	National Plan for Human Development 2012- 2016
Peru	Bicentennial Plan: Peru towards 2021
Panama	Strategic Government Plan 2015-2019
Paraguay	National Development Plan Paraguay 2030
Trinidad and Tobago	Vision 2020 Draft National Strategic Plan
Uruguay	Equity Plan
Venezuela	Plan of the Nation

## Annex D – Helpful Tools

### Social Media Analysis

The social media pilot showed that social media analysis can be used to improve how the Bank communicates regarding gender issues, as it identifies the key communication influencers, hashtags, and important dates to increase awareness of what the IDB is doing in terms of gender. The analysis also elucidates what is being talked about in social media during a set monitoring period, and this can help identify issues that perhaps were not being considered in established analyses.

**FIGURE D1. EXAMPLE OF KEY INFLUENCERS, FACEBOOK, ARGENTINA**

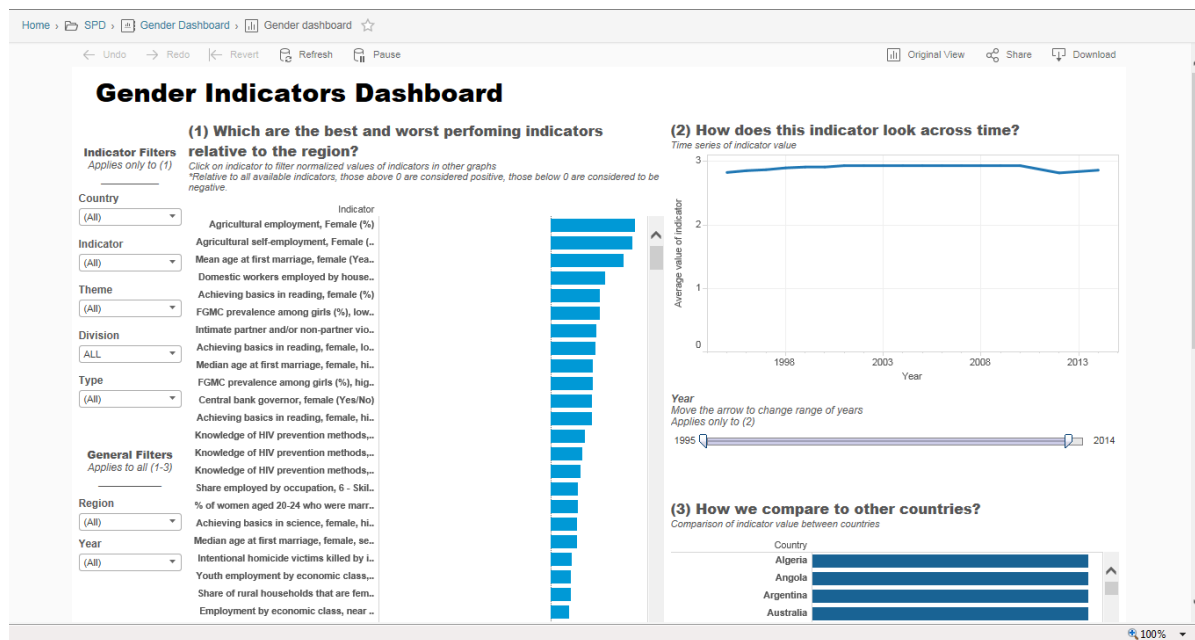
Source: IDB. Social media analysis, November-December 2015.





FIGURE D2 - IDB GENDER DASHBOARD

Notes: IDB Gender Dashboard is available on the IDB's intranet only.



### Gender Dashboard

The study took advantage of existing data sources that are Application Program Interface (API)-enabled, which allows external users to “call” or extract data from various sources at the push of a button. Through this study, an algorithm was created in-house to extract and transform hundreds of gender-related indicators from the IDB’s Numbers for Development, [World Bank data](#), and [NoCeilings.org](#) using [R](#), an open-source program. These data were then formatted and displayed in a tableau dashboard (Figure D2) tailored to the needs of IDB specialists to help identify relevant gender indicators that could be used in the preparation of operations and Country Development Challenges documents.

### Text Algorithm

It can be time-consuming to go through a large amount of documents to monitor the inclusion of gender topics. A text-mining routine in the [R](#) programming language was developed to search and index documents at a high speed. The program automatically finds and downloads relevant documents in the IDB systems.

The program generates output that can be converted into a map of the number of times one of the 26 gender keywords provided by the Gender and Diversity Division (GDI) coincides with 209 sector terms within a document paragraph.<sup>8</sup> The algorithm then generates a spreadsheet that can be opened

<sup>8</sup> The 26 gender keywords were developed in conjunction with GDI and the 209 terms developed from the 17 IDB subsector terms used for classifying projects.



and analyzed in Microsoft Excel. This approach is both practical—as the frequency of mentions of the concepts/words can be analyzed using Excel pivot tables—and efficient, as the data structure allows for the analysis of a large number of documents in a relatively small spreadsheet.

For this study we used the program download to analyze 1,821 sovereign-guaranteed loan and technical cooperation documents. The running time for the program was an hour and a half—a great advance, as a comparative exercise took 16 hours just to manually search, download, and extract the main objective and the results matrix of 254 operations documents.

The program may be used to analyze other text in IDB systems or elsewhere. A test run demonstrated the capability to download and analyze the content of all 4,463 IDB blog posts in 24 minutes.

In previous text-mining studies, the word count has been found to relate to the quality of information in documents.<sup>9</sup> Our analysis found a strong correlation (0.78) between the number of gender-related terms and the GDI rating for Country Strategies. Figure D3 shows this relationship: it summarizes the number of gender keywords by GDI rating. While the first three categories overlap slightly, the “significant” rating stands distinctly separate from the others. This may indicate that the number of gender-related terms could be used as a proxy to help identify documents with a significant rating or above. However, the tool has a harder time distinguishing among the lower ratings (none, minimal, and partial).

For the loan and technical cooperation documents, we also found a strong relationship between the results of the text mining and the GDI rating. We found the strongest predictor of the GDI rating was the number of paragraphs in each document that mention gender. Using an ordered logit model, we regress the log of the number of paragraphs containing gender related words on the GDI rating. We find the predicted value corresponds to the actual GDI rating 80 percent of the time and is within one rank on the scale 98 percent of the time.

While the paired-words strategy (i.e., measuring how often gender and sector words appear in the same paragraph) described above is informative in some cases, it can be misleading in others. There is a higher chance of false positives for paragraphs that list activities, as these activities may not be related. For example, a document stating that “gender, transportation, and education” are among a country’s priorities does not imply interactions between gender and transportation projects or strategies. Therefore, lists should be excluded from the analysis. In many IDB documents, lists have enumerated items with roman numerals (e.g., i, ii, iii) or letters (e.g., a, b, c). Since “ii” or “b” are not words in the English or Spanish languages, indexing paragraphs with these letters as complete words can help to correctly identify these lists. However, the algorithm does not yet exclude these. For the analysis conducted for this study, these lists were identified after the algorithm yielded the results.

Another source of false positives is searching for generic gender-related words. The algorithm is most effective when it has specific terms compared to more generic words. For example, it is harder to have false positives with the term “violence against women” or “women’s agency” as opposed to “girl,” as the latter can be referring generally to “boy or girl” without mentioning a specific action, and its feminine Spanish translation, “niña” can pick up nongender terms such as “La Niña” or “fenomeno de la niña” which is a weather phenomenon that has nothing to do with gender. However, casting a wider range of words would decrease the chances of “false negatives” or of excluding documents that do contain gender. The algorithm is sufficiently flexible to accommodate any combination of search terms, which can be tailored according to the needs of the team.

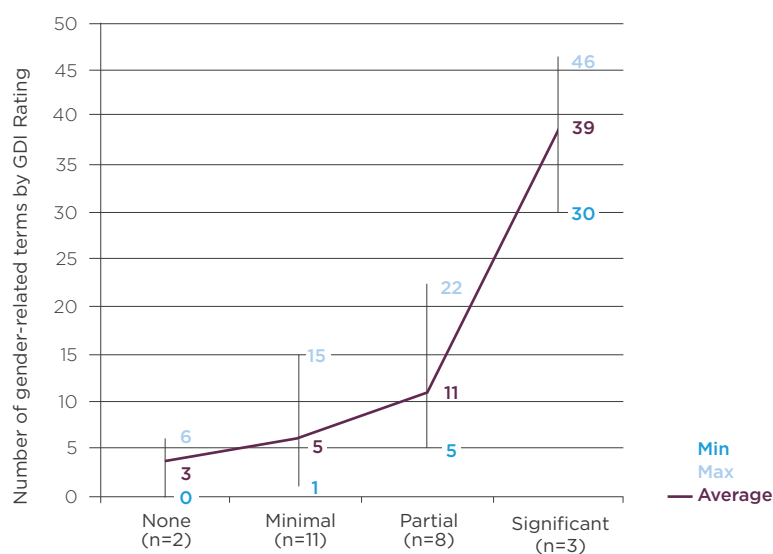
Our analysis highlights how text-mining algorithms and related technologies can help monitor where gender terms have been included in both internal and external documents, including blogs, publications, and national development plans. However, these algorithms cannot gauge the substantive impact of the gender language on project processes about out-

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<sup>9</sup> Blumenstock (2008).

**FIGURE D3. RELATIONSHIP BETWEEN GENDER KEYWORD COUNT AND IDB GENDER AND DIVERSITY DIVISION (GDI) QUALITY RATING**

Source : IDB. Review of 24 Country Strategies from 2011-2015.



comes. Automated document processing should be viewed as a complement to existing qualitative analysis, not a substitute. For example, the text-mining algorithm can be applied as an initial filter that sorts out documents that do not have any mentions of gender. For this purpose, the risk of false positives is high, even after controlling for lists, and therefore a careful manual evaluation would still be required.

Another way in which the text algorithm can be used is monitoring the use of very specific phrases such as “violence against women,” which, in conjunction with certain filters (such as watching out for lists, as explained earlier), helps minimize the chances of false positives. Again, there is a need for a gender specialist to dedicate time to review how this

word is used to be able to determine whether it is simply mentioned in a document or addressed by the project in a meaningful manner.

Finally, we observed that the time it takes to acquire the documents themselves encompasses a portion of the work involved in monitoring documents. Algorithms such as the one described, as well as other types of new technologies (e.g., IBM’s Bluemix, a cloud platform service that can potentially speed up the acquisition of documents as they are in the cloud) can also help decrease time spent monitoring gender simply because they help acquire the relevant documents. However, qualified individuals who are skilled at reviewing the quality of gender mainstreaming would still be needed.



# 8

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