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MONITORING SYSTEMS IN AFRICA

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Chapter 2: Strengthening Equity-Informed Monitoring Systems Within the Public Service

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Introduction

Governments worldwide implement results-based performance monitoring frameworks to measure and evaluate the programme progress and effectiveness, aiming to enhance performance and achieve strategic development priorities. These frameworks serve two interconnected and mutually reinforcing functions of good governance. Firstly, they ensure accountability by assessing state performance in relation to expenditure, guaranteeing that government services, funded by taxpayers, are accessible and equitable to all citizens. The routine M&E systems employed by governments across sectors tend to prioritise the compliance and accountability aspects of good governance, aligning with positivist requirements.

However, this chapter asserts that the other facet of good governance, namely the imperative to comprehend why significant portions of society remain underserved and marginalised, demands greater attention. The summary presented in Figure 1 illustrates that equity and inclusion must be integral characteristics of good governance (Agrawal Kalugampitiya, Rinxin & Hashim 2017).



Figure 2.1: Agrawal et al, *The Place of Equity and Inclusion in Good Governance Systems*. 2017

In the context of public sectors, good governance encompasses the structures, systems, and government entities that collaborate to facilitate evidence-informed decision-making processes and the execution of policies, programmes, and projects aimed at fostering equitable economic and social development, ensuring that no one is excluded. At the core of public sector good governance lies the monitoring and evaluation process, which serves as a mechanism for performance management and accountability.

Within this expansive domain of good governance, there exist opportunities for leaders and practitioners in monitoring and evaluation to critically examine their practices and identify approaches to enhance monitoring systems with a focus on equity.

The first step involves mapping out the theoretical underpinnings of equity-informed monitoring, evaluation, and learning practice and explaining why this approach

goes beyond compliance to serve a more developmental purpose. This chapter will unpack some of these theoretical positions on the role of equity in M&E and examine how these understandings are being translated into emerging technical practices in different sectors. It will also address the types of capacities that need to be nurtured to achieve equity-oriented monitoring.

The public sector should question whether evaluation, as a practice, contributes to entrenching and maintaining conditions of inequality or if it holds the potential to act as a transformative developmental agent through equity-driven evaluation methodologies. Morkel (2021) argues that evaluation for transformational change or transformative evaluation should be grounded in social justice and equity in Africa. In her blog post, Jara Dean-Coffey, a specialist and writer in the field of evaluation, emphasises that “our distance from the work/people/issue/community has often led to us not seeing/feeling what is happening, but also not understanding the nuance and complexity that exists in the human experience, let alone the planet or universe”.² The African Evaluation Association (AfrEA) acknowledges this omission and urges evaluators to consider that “evaluation considers issues and norms that are sensitive and important in African contexts, including power dynamics, the relationships between people, the policies and priorities for development, different ideas about what ‘success’ is and how it can be measured, and the balance between the rights of individuals, societies and nature”.³

The rigours and constraints imposed on government-led M&E processes are inherently technocratic rather than people-centred. Consequently, M&E processes are often described as mandatory, compliance-focused, extractive, burdensome, and costly. This chapter argues that such terms would be less frequently used if conventional M&E methodologies became more inclusive, equity-driven, and participatory. This necessitates transforming the discourse surrounding the conceptualisation and utilisation of M&E by practitioners, moving beyond mere data collection and information processing, and embracing a comprehensive commitment to equity and inclusion. In the African evaluation context, evaluators must recognise that development requires a complex systems-informed evaluation approach that integrates sociocultural, economic, political, technological, and environmental factors, connecting local contexts with the global stage and Africa with the world (AfrEA).

Many reasons drive the instinct to actively improve and strengthen government monitoring and evaluation systems. Fiscal pressures and the increasing expectations of ordinary citizens continuously motivate governments to expand services and

2 Jara Dean-Coffey. 2021. Positionality posted on the Equitable Evaluation Initiative website at <https://www.equitableeval.org/blog-main/positionality>

3 African Evaluation Association. 2021. The African Evaluation Principles at <https://afrea.org/AEP/new/The-African-Evaluation-Principles.pdf>

enhance quality standards (Mackay 2007). This includes addressing the expectations from vulnerable, marginalised, and underserved citizens in an equitable manner. However, achieving this may be challenging as vulnerability and marginalisation within societies often stem from structural inequities, encompassing political, economic, and social dimensions. Without understanding and measuring these factors comprehensively, governments face difficulties in effectively addressing them. Additionally, when dealing with broad concepts such as poverty, inequality, and marginalisation, the diverse and nuanced aspects of people's lived experiences are often overlooked. Generalised, insufficient, outdated, or poorly disaggregated data, as well as data gaps, can lead to service gaps, leaving segments of the population unaccounted for in national statistics. Consequently, the lack of evidence negatively impacts the state's ability to meet the needs of the most vulnerable and marginalised groups in society, weakening its capacity for equitable service delivery.

The Changing Landscape of Government Monitoring Systems

Practitioners generally face the challenge of being unaware of critical equity and inclusion-related data. Holmes (2020:1) highlights the concept of “positionality”, which refers to an individual's worldview and the position they adopt regarding a research task and its social and political context. The concept of positionality challenges the notion that the practice of M&E should be objective and free from values. Consider two government M&E officials working with police crime data and engaging with statistics related to gender-based violence (GBV), including rape, sexual assault, and femicide. Each official brings their professional and personal perspectives to the data. One may possess knowledge, empathy, and responsiveness to gender-based inequalities, while the other may hold a patriarchal understanding of gender roles. However, these perspectives can converge when acknowledging that each data point represents a complex individual with unique circumstances in their lived reality. This understanding allows these practitioners to shape the evidence to inform equity-responsive analysis effectively.

Equity-driven monitoring systems require practitioners who understand and are committed to using evidence to measure both the drivers and consequences of inequalities. Achieving this necessitates capturing evidence that reveals structural issues (drivers) and the socioeconomic impacts (consequences) of inequalities within societies, considering how they affect different segments of the population. In the case of police data on GBV, combining disaggregated data sets can provide a more detailed understanding of the victims and survivors, encompassing factors such as age, ethnicity, geographical location, marital status, and education level to a broader degree. At a more granular level, additional information such as social and economic

status, level of education, sexuality, and HIV status can be considered.⁴ Working with a more comprehensive cross-section of data allows practitioners to identify patterns and intersections of inequity and exclusion. This, in turn, enhances their ability to provide evidence that informs the work of policymakers and programme designers. The Organisation for Economic Cooperation and Development (OECD 2018:72) emphasises the importance of national statistical systems pursuing sophisticated data disaggregation strategies. Current statistics typically capture national averages but fail to reveal disparities at the subnational, community, household, and individual levels. AfrEA advocates for evaluations that serve an equity purpose, recognising their potential as transformative exercises. They further emphasise that financing, commissioning, conducting, and utilising evaluations in Africa are “highly responsible tasks, especially when dealing with vulnerable communities and economies, developing institutions, and the rich diversity of worldviews, experiences, and traditions that define African societies” (AfrEA).

Monitoring systems that are designed to produce equity-informed evidence are most effectively managed by practitioners who comprehend the importance of moving beyond routine or standardised measurement processes and utilising the broader potentiality of data. The pervasive challenge of poverty in Africa and the way in which it is measured can be examined. In the development context, poverty is generally seen as the overarching manifestation of inequality. This is highlighted by the fact that poverty and inequality feature prominently in the United Nations’ seventeen Sustainable Development Goals (SDGs).⁵ In the broadest terms, the most widely used measure of inequality is the Gini coefficient, which ranges from zero (perfect equality) to one (perfect inequality). The Gini Coefficient is a generalised, population-based metric. It is not easily broken down to reveal the sources and consequences or the sections of the population most affected by inequality. Inequalities and disadvantages are embedded in the power dynamics of social structures such as class systems, cultures, religions, and gender relations, and often manifest in social institutions and socioeconomic systems. A more composite and multidimensional response is required to better understand the complexity and multidimensionality of the drivers of poverty and inequality, given that narrowing gaps in one area may not be sufficient to reduce disparities in other domains of well-being (Rohwerder 2016). Statistics South Africa (StatsSA) has undertaken work on a nuanced approach to the consideration of the multidimensional and intersectional forms of poverty to

4 The concept of “granularity” in M&E refers to the level of detail of data, based on the understanding that the more that detailed that data is, the more precise any analysis can be.

5 The SDGs were adopted by the United Nations in 2015 as a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people enjoy peace and prosperity – see <https://www.undp.org/sustainable-development-goals>

develop a multidimensional poverty index, intended to move away from the blunt measurement of poverty, such as the World Bank's \$1.90 a day threshold.⁶

An added layer of complexity involves the descriptors associated with the concept of inequality, such as vulnerability, marginalisation, disadvantage, deprivation, disempowerment, and social exclusion. Bok (2018) argues that social exclusion can be described as a comprehensive, multidimensional, and dynamic concept that generally refers to the limited opportunities of individuals to participate financially, socially, culturally, and politically in their societies. Khan et al. (2015) suggest that social exclusion is a process by which certain groups are systematically disadvantaged due to discrimination based on their ethnicity, race, religion, sexual orientation, caste, descent, gender, age, disability, HIV status, migrant status, or area of residence. It further refers to the processes behind the accumulated vulnerability and weakening of social rights, including discrimination embedded in public institutions, such as the legal system or education and health services, and social institutions like religion, cultures, workplaces, family networks, and the household. Sen, Kessler and Loveridge (2018) proposes a capabilities approach and argues that social arrangements should be evaluated according to the extent of freedom with which people can promote or achieve functionings that they value, suggesting that wellbeing should be measured according to what individuals can do (capabilities) as opposed to what they do (functionings). This poses a challenge for M&E practitioners who need to understand the assumptions made by Sen et al. (2018), and the way in which to develop tools that can measure capabilities.

Applying an Equity Lens to Monitoring Systems

An equity perspective makes the production and use of data fairer, more robust, and more accurate in general. Moreover, to ensure equity in any analysis process, the data being used must reflect the fact that an individual's experiences are not unidimensional (poor, illiterate, or HIV positive) but are based on multiple and intersecting dimensions, identities, and experiences. As an example, the effects of poverty, marginalisation, disability, and sexuality would intersect within the reality of a person who is a poor, rural, disabled lesbian of ethnic minority. Different combinations of demographics and identities create different types and experiences of inequality for various people. From an equity point of view, it is essential to gear monitoring systems toward generating data and analysis that reflects these very granular realities. Population-level data for disability (2.6% of the population) does not reflect different kinds or experiences of disability. Neither does it reflect the different levels of opportunity and access that disabled persons from different backgrounds may have. When monitoring systems work with blunt data, they tend to overlook or conceal the

6 The World Bank data portal at <https://data.worldbank.org/indicator/SI.POV.DDAY>

different socioeconomic realities of population sub-groups and, consequently, reduce analysts' ability to dissect issues of diversity, intersectionality, and difference. This lack of multidimensional data could impact policymaking where policies are designed based on inadequate or insufficiently differentiated evidence.



Figure 2.2: *Wheel of intersectionality, Identiversity*, [1 July, 2023]

Common drivers of inequality relate to a lack of inclusive growth, lack of investments in human capital, lack of pro-poor fiscal policies and redistribution, lack of access to essential services and human rights, and a lack of political will to tackle the root causes of discrimination, as well as structural exclusions based on social, political, cultural, and economic factors. Every country has its unique systemic challenges in this regard, but these dynamics often play a role in perpetuating social, economic, and political inequities within societies. Issues related to legal discrimination, social expectations regarding gender and sexual identity roles, restrictions on bodily integrity, class and ethnic forms of discrimination, and various forms of exploitation and marginalisation, largely explain the persistence of unequal outcomes in employment, entrepreneurship, health and wellbeing, access to opportunities, and political representation.

With women making up just over 50% of the world population, gender is perhaps the most contentious area of inequality. The Organisation for Economic Cooperation and Development (OECD) notes that discrimination in social institutions, such as education, health provision, the labour force, and financial access, contributes to

obstacles in gender equality in development outcomes across all world regions.⁷ However, the commitment to the implementation of equity-based monitoring and evaluation systems remains rhetorical, unless M&E systems within public services are able to develop and implement indicators that measure progress on achieving gender equality by understanding that the lived experience of women and girls is complex, heterogeneous, and multidimensional.

The term 'institutional', as referred to by the OECD, speaks to the formal and informal systems, rules, and norms that structure and govern the social order and that obstruct or exclude people from social service provisioning, public employment, or other areas of social interaction (Fischer 2011). The parameters for acceptable decisions, choices, and behaviour for women and other marginalised groups in society are established by social institutions, and consequently define their roles and impact their life outcomes. These are undoubtedly challenging areas to measure if conventional M&E tools are used. Religious and cultural norms regarding sexual and reproductive health typically oppose notions of equity and rights, resulting in the disruption of equity-informed evidence for M&E practitioners to work with. The data challenges associated with an equity-oriented approach to managing data on abortion, contraception, age of consent, sex trafficking, cyber-grooming of underage girls, and female genital mutilation, should be considered. Gender-based discrimination in rights, opportunities, and outcomes interconnect and overlap, thereby further reinforcing women and girls' marginalisation.

Discriminatory laws, norms, and practices as measured by the OECD's Social Institutions and Gender Index (SIGI) and the African Development Bank's (AfDB) Africa Gender Index (AGI), map the limitations placed on the role of women as sexual beings, workers, entrepreneurs, healthy citizens, leaders at the national and local levels, and actors of human development. Based on these kinds of indices, higher levels of gender-based discrimination in social institutions are associated with lower equality in outcomes. Simplified, this means that countries with higher levels of discrimination in social institutions are further from achieving gender parity. In its 2020 report, the AfDB notes with emphasis that the limited availability of policy-relevant gender statistics poses a challenge to the inclusion of several fundamental aspects of gender inequality in the AGI.⁸ The recognition that national and regional statistics are lacking in critical areas where exclusion and marginalisation are most pronounced is a positive step forward for advocates of a more equity-driven monitoring practice that integrates this approach into monitoring systems.

Fisher (2011) argues that exclusion is a pressing development concern. An equity-driven monitoring approach highlights the intersecting processes of exclusion which

7 OECD at <https://www.oecd.org/dev/development-posts-gender-discrimination.htm>

8 Africa Gender Index: Methodological and Statistical Report 2020:7.

are not effectively captured by poverty, inequality evidence, and methods of analysis, particularly those within contexts of high or rising inequality. Absolute and relative indicators often reveal little about processes of exclusion and marginalisation, and if they do, they tend to do so by revealing clues about the spaces within which exclusionary practices and processes might operate. It is understood that poverty is a problem statistically, but the various ways in which different “poor” or “marginalised” people are impacted is not as clear. Standard statistical sampling methods based on generic outcome indicators are the customary practice in the government and development sectors but are poorly suited for approaches that focus on equity or social inclusion. An example would be the way in which a blunt statistic, such as the HIV+ percentage of a population (usually disaggregated by age and gender), fails to capture differential experiences of access to testing, treatment, care, and support, as well as community and internalised stigma. To this end, more inductive methods, such as gathering granular data at the ground level, would better serve monitoring systems that can trace the kinds of implicit and explicit socioeconomic dynamics that affect people’s lives. This would include interdisciplinary analyses of structural and institutional disjunctures and asymmetries operating across social hierarchies and among comparable cohorts within a social hierarchy, such as those with similar levels of educational achievements and employment expectations.

Reimagining the Monitoring Paradigm

The utilisation of the tools of equity, inclusion, and intersectionality requires a shift in methodological approaches to data collection and analysis and an epistemological shift in terms of what constitutes valid and recognised data. Part of the epistemological shift has been the movement from hard, empirical (quantitative) data to a growing interest in the more qualitative dimensions of intersectionality, which form an integral analytical layer for a better understanding of the complexity of inequalities and social exclusion. Originally posited by legal scholar Kimberlé Crenshaw in the field of critical legal studies, the concept of intersectionality aimed to deconstruct the application of laws utilised in legal cases to illustrate the ways in which the structures of law and society could be intrinsically racist. Crenshaw (1989:167) noted that intersectionality is a strategic way to place those who are currently marginalised at the centre of the conversation and is “the most effective way to resist efforts to compartmentalise experiences and undermine potential collective action”. The concept of intersectionality as a framing construct has subsequently been applied in various disciplines, including radical sociology, feminism, gender studies, queer theory, equity and diversity studies, and critical race theory.

The concept of intersectionality has become a contentious term in the lexicon of conservative politics for its work in deconstructing racist, colonial, sexist, and homophobic discourse. Despite resistance, the concept of intersectionality has become a

valuable analytical tool throughout the last decade, particularly for those working on issues related to socioeconomic inequalities and marginalised or vulnerable populations within societies. While it has been broadly applied in qualitative research studies, it has only recently experienced a surge in quantitative research, owing to the technical and cost challenges associated with collecting more granular quantitative evidence. However, the implementation of a theoretical intersectionality framework into quantitative data analyses is gaining increasing interest in health research due to the understanding that the complex causes and mechanisms leading to health inequalities can be improved by the integration of an intersectionality framework (Mena et al. 2019). This can be similarly applied to other social sectors such as education, criminal justice, and social protection, where inequities constitute a significant determinant of access to fair and appropriate services. It is evident that people may continue to ‘fall through the cracks’ in policymaking and service delivery due to the lack of data to evidence and understand the unique challenges experienced by people facing multiple forms of inequality.

Many countries have constitutions that enable states to prioritise human rights, inclusion, and equity for all citizens, and rights-based pieces of legislation and policy frameworks that stem from crucial constitutional mandates. Some countries retain policies and legislation that undermine efforts to achieve equity and inclusion despite having a rights-based constitutional mandate. Challenges arise when government sectors are expected to realise different kinds of equity imperatives in their work or services, with these being dependent on existing policies as well as the quality of data available to policymakers and planners. In budget-constrained countries where public services are often inadequate, many citizens slip through the inclusion net due to their specific vulnerabilities not being captured in official data sets. Individuals who are at the intersections of disadvantages may struggle to have their needs met when “policies are developed using a single-factor lens, activated by single-factor trigger points, and/or developed to offer single-factor interventions” (Corus et al. 2016); they are “invisible” to official recognition. Crenshaw, and other feminists, point to the intersection of race and gender in countries such as the United States and Brazil, where women may face exclusion from jobs deemed more appropriate for men due to their sex. Women may be excluded from jobs considered “women’s jobs” because of their race (AWID 2004). As a result, women of ethnic minorities specifically face exclusion from employment opportunities. If official data collection and analysis processes do not recognise these experiences, there is little likelihood that they will be addressed in any viable policy or programmatic way. It is evidenced by these methodological challenges that there is enormous scope for M&E and knowledge management practitioners, who work at the fulcrum between data generation and data analysis, to interrogate their practice and start applying new methodologies and tools to sharpen an equity-informed intersectional practice.

There exists a tendency within government to foreground the importance of stakeholder consultation and community engagements to foster understanding regarding people's lived realities, but these engagements can be formulaic and are incapable of allowing communities to feed local experience and knowledge into government monitoring systems. This highlights a lost opportunity, as government responsibilities (including the provision of healthcare, education, and social assistance) require ever more sophisticated evidence sources to enable the design of policies and programmes that are as inclusive as possible and are informed by the actual needs of people. The tendency of people being omitted from data is particularly distressing, as government policies and programmes that produce administrative data can inadvertently contribute directly to creating, enabling, and sustaining institutional and structural forms of discrimination and marginalisation. The desirable condition is one that allows cross-sector data sharing and integration, which enables the transformation of individual-level information into actionable intelligence for M&E practitioners. Ideally, more granular evidence can be used to understand urgent and long-term community needs and can result in the implementation of improved and more equitable services, systems, and practices that, according to the UN concept, "leave no one behind".

Reflections on the Discourse of M&E

Considering the reflections on what could be considered a "desirable state" for an equity-informed M&E practice, it is crucial to acknowledge the ideological challenge posed in terms of the implementation of an equity-informed monitoring process. Concepts such as human rights, social inclusion, and equity are socially constructed and hinge on a consensus regarding the definition of 'normal' in each society. As an example, 2021 saw 31 countries throughout the world legally recognise same-sex marriage, while 71 countries criminalise same-sex sexual activity, and 11 of those countries impose the death penalty in response to it.⁹ Defining the concept of 'normal', 'acceptable', or 'decent' is not a simple task in many developing countries, where many people do not enjoy what may be considered a decent standard of living, due to the perspectives that countries or regions may have on critical developmental challenges. People who find themselves outside of their specific societal definition of 'normal' may be excluded based on their race, caste, or gender, due to social exclusion being structured around hierarchy. It is often difficult to 'objectively' identify those being socially excluded, as it is a matter of assumptions made, criteria adopted, and judgements used, which results in the concept of social inclusion and exclusion being contested. Equity and inclusion concepts focus attention on two central elements of deprivation: its multidimensionality and the processes and social

⁹ Human Rights Campaign. 2022. Marriage Equality Around the World <https://www.hrc.org/resources/marriage-equality-around-the-world>

relations that underlie it. Social exclusion overlaps with poverty but extends beyond it by explicitly embracing the relational and distributional aspects of poverty. It is crucial to understand that M&E practitioners work in accordance with their position within a society and its values, in an evidence landscape that is fixed (i.e. global indicators) but fluid (i.e. the domestication of global indicators).

Work within a monitoring environment can be experienced as a one-dimensional technocratic exercise, with it being a mechanistic and functional “tick box” process of managing data inflows and assessing progress against indicators in performance frameworks. Every piece of human data tells a story or frames a real, lived experience. In viewing ourselves as development M&E practitioners, we can interact with data in ways that detail lived realities in a world inundated by inequality on multiple levels. Following Shanker (2018), the equity-driven M&E practitioner can reflect on and pose challenging questions about data, such as how a data point categorising a person as “unemployed” is informed by how that individual is racialised, classed, gendered, and sexualised. Having the necessary granularity of evidence to do these kinds of equity-informed analyses becomes critical in driving a more ethical and developmental practice.

With some issues that inform an equity-oriented M&E approach being outlined previously, the following consideration focuses on the means by which these approaches can be translated into reimagined practices. Efforts to introduce equity as a key monitoring component are relatively recent and have yet to be systematically mainstreamed into government monitoring and evaluation processes. Much of the innovation and experimentation in this regard is being tested in the development and philanthropic sectors, and to some extent in the private sector. While the theoretical underpinnings of intersectionality provide an essential lens for understanding social exclusion challenges, the M&E sector needs to grapple with the “how to do equity” conundrum. The focus within an African context lies in the move to “decolonise” evaluation, which entails a process of comprehensive review of the ideological and epistemological underpinnings of current practices and knowledge. These should be gathered, taken apart, broken up, and critically examined to identify their benefits and weaknesses in terms of equity-informed practice. This is an emerging area of interest within the M&E field, and it represents opportunities for technical experimentation and innovation. Bowleg (2008), for example, argues that a key dilemma for researchers and M&E practitioners working with intersectionality is to grapple with the assumptions inherent in measurement as well as qualitative and quantitative data analyses, and to transform them so that equity can be integrated into practice.

In the M&E environment, an inherent bias exists towards easily quantifiable, pragmatic, and reductionist data that simplifies the process of making sense of a complex world. However, this approach contradicts the central tenet of intersectionality, which is that social identities and inequality are interdependent for many groups of people and are not mutually exclusive. Programme interventions and their associated M&E frameworks rely on output and outcome level indicators to measure progress and do not attempt the building of intersectionality thinking into the process. Discrete and continuous variables, such as gender, race, ethnicity, and age, are measured as independent factors but attempts to understand how these variables intersect and interact with each other are rarely undertaken. Considering this gap, interpretation becomes one of the most substantial tools in the methodological toolbox of researchers, data analysts, and those working with M&E systems. Significant progress is being made, for instance, in the United Kingdom, where charters have been put in place that require government institutions across the board to collect equity and inclusion data that ethically reflects intersectionality considerations.

Equity-oriented practitioners across the policy, programming, monitoring, analysis, and reporting spectrums can be sensitised and informed by a range of approaches such as heuristics, assessment tools, checklists, and matrices. Second and third-wave feminists and queer theorists working in gender and sexuality studies carried out much of the initial analytical thinking regarding embedded socioeconomic and political inequity. One such theorist, Caroline Moser, introduced the Gender Analysis Framework in the 1980s as a means of supporting an integrated gender-planning perspective in all development work, concentrating on the power relations between men and women. This approach allowed planners to engage with the complexity of inequality and introduced the subordination of women into planning and monitoring discourse.¹⁰ Some of this analysis has been translated into public and development theory and practice. The gender-responsive assessment scale, a tool developed by gender studies theorists, enabled policymakers, programme designers, and M&E practitioners to reflect on and assess the level of gender-responsiveness manifested policies, strategies, and programmes. This also resulted in the interrogation of the kinds of indicators being used to collect critical data. The value of these analytical tools lies in their ability to be adapted to the assessment of gender-responsiveness as well as other areas of inequality, complimented by an additional intersectionality lens. The following scale is adapted from the World Health Organisation (WHO) Gender Responsive Assessment Scale, which was developed for managers in the health sector:¹¹

10 European Institute for Gender Equality. 2019 available at https://eige.europa.eu/sites/default/files/mh0319271enn_002.pdf

11 https://www.who.int/gender/mainstreaming/GMH_Participant_GenderAssessmentScale.pdf

Table 2.1: *WHO, Gender Responsive Assessment Scale*

Equity Responsive Assessment level	Consequences for policies, strategies, and programmes	The extent to which an Intersectionality Lens is applied
Equity-Unequal	- Perpetuates inequality by reinforcing unbalanced norms, roles, and relations. - Privileges one or more groups over others. - Often leads to one group enjoying more rights or opportunities than the other.	- There is no understanding of differences within groups or how social norms determine these differences. - Groups are homogenised and essentialised.
Equity-Blind	- Ignores societal norms, roles, and relations (gender, religion, culture, etc.). - Very often reinforces identity-based discrimination. - Ignores differences in opportunities and resource allocation for different groups/populations. - Often constructed based on the principle of being “fair” by treating everyone the same.	- Poorly informed understanding of different identities within groups is not accounted for. - Intersections of identity and experiences are not seen. - Different identities and experiences are collapsed into generalised categories.
Equity-Sensitive	- Considers societal norms, roles, and relations. - Does not address inequality generated by unequal norms, roles, or relations. - Indicates equity awareness, although often no remedial action is developed.	- Some understanding of how social norms construct identities. - Some understanding of how intersecting identities determine people’s life experiences. - Limited understanding of how to respond to intersectionality at a policy or programme level.

Equity Responsive Assessment level	Consequences for policies, strategies, and programmes	The extent to which an Intersectionality Lens is applied
Equity-Specific	• Considers societal norms, roles, and relations for different groups and how they affect access to and control over resources. • Considers the specific needs of different groups. • Intentionally targets and benefits a specific group of people to achieve certain policy or programme goals or meet certain needs. • Makes it easier for people to fulfil duties that are ascribed to them based on their perceived socioeconomic roles.	• A more nuanced understanding of how intersecting identities determine access to and control over resources. • Consideration is given to complex identity formation within groups. • Some ability to respond to intersectionality in the formulation of policies and programmes.
Equity-Transformative	• Considers gender norms, roles, and relations for different groups and that these affect access to and control over resources. • Considers the specific needs of different groups. • Addresses the causes of inequities. • Includes ways to transform harmful social norms, roles, and relations. • The objective is often to promote equality. • Includes strategies to foster progressive changes in power relationships between different groups of people.	• A strong theoretical grasp of intersecting identities and differential outcomes within and between groups. • Policy/programme responses consider intersectional impacts. • Addresses the causes of inequities at a granular level. • Includes ways to transform the modalities of intersectionality that negatively impact people's life experiences and outcomes.

An assessment scale such as this needs to be utilised across the policy and programme cycle to be effective. A challenge often faced by equity-responsive monitoring practitioners is the immensely complicated means of measuring the performance of strategies and programmes which have failed to integrate equity and intersectionality considerations during the conceptualisation and design phase. However, monitoring systems can be proactive in inserting equity adaptations from the bottom up. A recent application is in the public health field of HIV/AIDS and

human rights, where the Global Fund (2019) has, in its “Breaking Down Barriers” initiative, set out programming parameters to address inequities in access to critical health and legal services.¹² In many countries in Southern Africa, HIV has become a manageable health condition. However, prevalence remains high in vulnerable populations, including the LGBTQIA+ community, sex workers, drug users, migrant communities, as well as vulnerable girls and women, where stigma and discrimination can impede access to public health and legal services. This example illustrates how the consideration of modifiable societal and contextual factors in the reduction of health inequalities becomes increasingly important both to implement and measure.

From the data generation and monitoring perspective, the challenge is that many aspects of individual lives remain largely unaccounted for in public data sources such as national censuses, household surveys, and demographic and health surveys. In the case of both communicable diseases (HIV, TB, and COVID-19) and non-communicable diseases (obesity, alcohol use disorder, and mental health) there are many reasons for this disparity which lie outside of the control of M&E practitioners. Some of these include the criminalisation of same-sex relations, sex work, drug use, migrancy, and their associated levels of societal stigma, discrimination, and marginalisation. Without reliable disaggregated data that reflects the intersectional experiences of people’s lives, the challenge for policymakers and programmers lies in the development of targeted interventions that are appropriately evidence-informed and are designed to reduce or eliminate inequities in access and opportunity.

Moving to More Equitable, Intersectional, and Inclusive Measurement

A challenge faced by monitoring systems includes the collection of data from populations that are difficult to reach. These populations often view the government as a threat to their safety and well-being, making this problem particularly relevant in terms of the government data collection processes. Civil society organisations that specialise in working with vulnerable populations are taking innovative strides in data collection from these populations. One such organisation, Frontline AIDS, has developed a peer-driven data collection system called REAct which monitors human rights violations and focuses on HIV programming as well as advocacy for marginalised people who are vulnerable to or affected by HIV and AIDS.¹³ Academic research institutions may also undertake Integrated Biological and Behavioural

12 The Global Fund. Human Rights <https://www.theglobalfund.org/en/human-rights/#:~:text=Through%20our%20Breaking%20Down%20Barriers,HIV%2C%20TB%20and%20malaria%20services.>

13 The technicalities of the REAct system are set out in the REAct User Guide <https://frontlineaids.org/resources/react-user-guide/>

Surveys (IBBS) that use peer researchers to collect personal data from hard-to-reach populations such as at-risk ethnic minorities, transgender people, sex workers, and survivors of rape. These approaches effectively use bespoke data collection tools to collect data that accurately reflects the intersectional reality of individuals who report into the system and makes referrals and tailor-made responses easier. The REAct system, for example, is run by peer community health workers and paralegals accepted and trusted by vulnerable people. They can collect data that official data collection methods cannot and feed it into national data collection systems such as health information systems. These applications in health research mark an emerging research paradigm that seeks to move beyond single or typically favoured categories of analysis (i.e., sex, gender, race, and class) to consider simultaneous interactions between different aspects of social identity, as well as the impact of systems and processes of oppression and domination (Palmen 2021).

The intersectionality wheel shown in Figure 3 (WHO 2020) is a useful heuristic that enables practitioners to think about what intersectionality means in practice. It uses a variant of the socioecological model that is premised on the overlapping and intersecting domains of the individual, the community, the society, and the structural dimensions of that society.

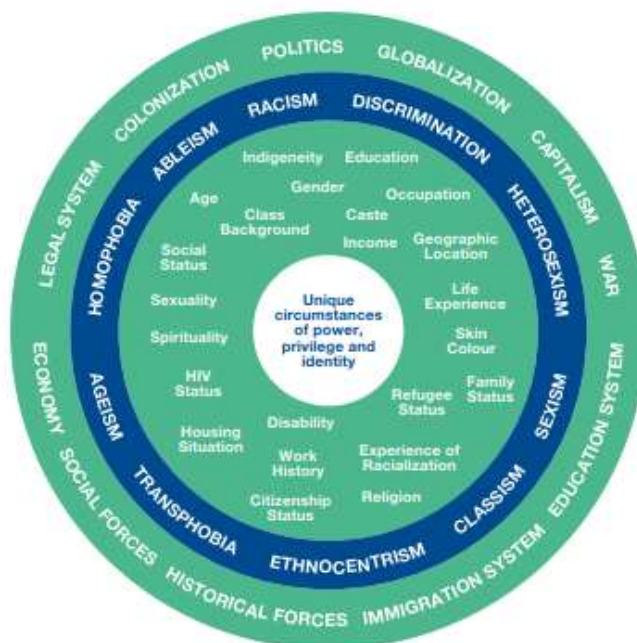


Figure 2.3: World Health Organisation, Intersectionality Wheel, s.a. (World Health Organisation 2020)

The intersectionality wheel illustrates how multiple individual characteristics (such as age, gender, and education) interact within broader processes of social discrimination (such as ableism, sexism, and racism) and structural barriers (such as political, class, and economic) to shape an individual's position within a given society. It allows researchers to model demographic characteristics across different levels by capturing people's lived experiences within the intersecting macro, meso, and microsystems. Intersectional approaches seek to consider the positions of all members of a given society and aim to illuminate the position of the most marginalised within existing power dynamics through the lens of the barriers faced in accessing equitable public services.

Government agencies in certain parts of the world actively use intersectionality as a monitoring strategy by addressing identity stereotypes and individuals' unique and intersecting experiences that result from race, gender, sexuality, disability, or other forms of vulnerability. Women and Gender Equality Canada has developed a process called Gender-based Analysis Plus (GBA+), which is an analytical process that can be used to analyse the "gendered" aspects of Canadian government policy to assess the different experiences of women, men, and non-binary people within policies, programmes, and initiatives.¹⁴ The 'Plus' component considers the intersectionality of identity factors and how the relationships between these identity factors impact the way in which government programmes and initiatives are designed, monitored, and experienced. The Ontario Human Rights Commission in Canada argues that intersectional analysis should become one of the lenses through which the social context of the individual can be examined and, in some measure, should assist in addressing social conditions relating to poverty, low income, and homelessness through improved data (OHRC 2021). In countries such as Canada, the United States, New Zealand, Australia, Mexico, and South Africa, First Nation people are often the most marginalised and stigmatised population segments.

Developed in the United Kingdom in 2005, the Athena Swan Charter is a globally used framework used to support and transform gender equality within higher education (HE) and research. Initially established to encourage and recognise a commitment to the advancement of the careers of women in science, technology, engineering, mathematics, and medicine (STEMM) employment, it is now being used in many countries to address gender and identity equality more broadly, no longer focusing solely on progression that affects women (AdvanceHE 2021). The South African Workplace Equality Index (SAWEI) is a similar monitoring system that enables South African companies to measure their progress against independently determined and research-based best practices regarding LGBTQIA+ inclusion in the workplace. This system uses a survey consisting of six elements that measure equity in the structures

¹⁴ Government of Canada. Women and Gender Equality Canada available at <https://women-gender-equality.canada.ca/en.html>

and behaviours of companies.¹⁵ The Gender Lens Investing Initiative is an intervention that stems from the Global Impact Investing Network (GIIN) which supports private sector impact investors in the active integration of a gender lens strategy into their investment portfolios to address the systemic issue of a lack of gender equity that has been present in the business and investment community throughout its existence.¹⁶ Part of this initiative has been to set up monitoring systems that can track the impact of investments on the lives of women and girls. The International Foundation for Electoral Systems (IFES) has developed a new assessment framework to identify intersectional barriers and opportunities related to people's political participation with multiple social identities, including gender, disability, and age.¹⁷ This participatory tool was developed based on the recognition that marginalised populations, including women, persons with disabilities, LGBTQIA+ persons, and people from ethnic or religious minorities, experience systemic discrimination in many countries. In some cases, victims of physical or psychological violence have had their political and constitutional rights undermined by voting rights barriers (Atkinson 2018).

Although marginalised groups experience well-documented barriers to political participation, there remains little analysis of the intersecting challenges or common goals between individuals in each area. The M&E field has recently undergone growth through the emergence of The Equitable Evaluation Initiative (EEI), which has assisted in the advancement of equity and the expansion of rigorous notions of validity and has fuelled the embracing of complexity.¹⁸ This approach shifts the current evaluation paradigm and encourages mindsets and practices to evolve towards a more equity-oriented practice. Its Equitable Evaluation Framework supports M&E practitioners working with Foundations and Civil Society Organisations to replace conventional narratives that marginalise, minimise, and disrespect people with ones that reflect an understanding of the systemic and structural barriers that limit the possibilities of people and their ability to thrive. These methodologies provide equity-focused tools for data collection that allow people who identify with multiple social identities to share the different ways in which they participate civically and politically, prioritise identified solutions to barriers, and share their opinions in targeted surveys. Where used purposely, these methodologies are a critical first step

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- 15 The SAWEI is managed by the LGBT+ Management Forum that works with companies across South Africa to create safe and equitable workplaces that enable lesbian, gay, bisexual, trans (LGBT+) professionals to contribute to their fullest potential, and the index reports are available at <http://lgbtforum.org/news/view/sawei-2021-results-announced-with-5-gold-tiered-companies>
- 16 Global Impact Investing Network, Gender Lens Investing Initiative <https://thegiin.org/gender-lens-investing-initiative>
- 17 International Foundation for Electoral Systems. Participation and Inclusion <https://www.ifes.org/issues/participation-and-inclusion>
- 18 Equitable Evaluation Initiative <https://www.equitableeval.org/>

towards generating intersectional data that can feed into and augment other more standardised datasets. UNESCO's World Inequality Database on Education (WIDE) is another useful interactive tool for illustrating how different forms of disparity such as gender, household wealth, ethnicity, religion, and residence, play an important part in shaping opportunities for and access to education.¹⁹ It visually demonstrates how overlapping disadvantages can compound education disparities. The World Inequality Database was initially created as the The World Top Incomes Database (WTID) in January 2011 with the aim of providing free and convenient access to all the existing series. It then expanded to include a series on income inequality for more than 30 countries which spanned over most of the 20th and early 21st centuries, with over 40 additional countries now under study.

Applying an intersectional approach (or lens) helps assess the potential impacts of initiatives – positive or negative – based on their multiple identity factors, enabling programmers to identify risks and potential challenges early and create mitigation strategies in response. An intersectional approach should be applied at all stages of an initiative, from development through implementation and monitoring to evaluation. The consideration and identification of people's diversity and multiple identity factors assist practitioners with the innovation and consideration of issues and policies in different, more reflective ways. This has clear implications for the design of programme monitoring systems. Most M&E systems, whether in government, the development sector, or civil society, are generally set up for administrative compliance, accountability, and routine reporting purposes, and tend to focus on broad policy and programme outputs that are easily measurable and reportable. This is crucial for government accountability to the type, scale, cost, and reach of their services to citizens. However, in the developing world context, most public services must address significant socioeconomic disparities at a broad societal level, such as addressing poverty, unemployment, and inequality. In most instances, their monitoring systems are not optimally equipped for tracking progress on gender and social inclusion and cannot, as a result, provide policymakers with data that is sufficiently granular and disaggregated. This could be a capacity issue, a design issue, a practice issue, or a combination of all three. In some cases, there may also be a lack of political appetite for collecting data on certain population segments.

For an effective monitoring system to be responsive to gender and social inclusion, the capacity, design, and practice issues need to be reappraised and reengineered. A more responsive monitoring system should provide more refined data to highlight the equity gaps and enable managers to better assess progress on key equity, gender, and social inclusion concerns, leading to more evidence-informed policy and programme decisions. There is also a need to have a more focused emphasis on advocacy and mainstreaming work with practitioners if there is a vision that

19 UNESCO <https://learningportal.iiep.unesco.org/en/blog/one-way-of-measuring-marginalization-in-education>

they can become developmental monitoring and evaluation specialists rather than M&E technicians. In reality, sourcing and producing standard data is not enough to make that data useful in terms of addressing equity considerations. Citizens are not interested in data; they are interested in improved services being designed and delivered based on available data and information that surfaces their realities. If that data is inadequate and only partially inclusive of a full range of citizen experiences, then the evidence bases for building, strengthening, and sustaining equitable services are compromised. Conventional monitoring systems within the government draw on available data ecosystems and produce compliance data or data that informs the indicators used for performance planning. The challenge lies in the data as well as M&E practitioners themselves being “blind” to the equity gaps in the data and the inadequacy of the data in informing an understanding of intersectionality issues. Efforts to address these equity gaps across the government policy and planning cycles are manifested in initiatives such as gender-responsive budgeting. This is a growing area of interest for developing country governments that are aware of the need to address gender inequalities across all sectors. In South Africa, for example, the Gender Responsive Planning, Budgeting, Monitoring, Evaluation, and Auditing Framework (GRPBMEA) is being championed by the National Treasury.

In some cases, grounds such as sex, race, ethnicity, or disability may intersect and produce unique effects creating “discrete and insular minorities” who are socially handicapped due to these same characteristics (OHCR 2016). Simple examples here include the situation of undocumented young migrant women, sex workers, or transgender women whom the state may deny critical sexual and reproductive health services due to their liminal status. Such situations may be typically thought of as people “falling through the cracks” or “being left behind” by government services that are intended to be inclusive and equitable. The lack of sufficiently disaggregated data (or no data at all) on these populations highlights the importance of monitoring systems of creating mechanisms that reflect and capture individual and group experiences based on multiple identities linked to more than one ground of discrimination. Alternatively, any one of these characteristics may intersect with other grounds such as social assistance, family status, and a further link to economic and social and class status to create unique experiences for the individuals that current developmental frameworks ignore. Even when combined with other grounds such as social assistance and family status, the extent of the discrimination may not be revealed by a traditional, non-intersectional approach.²⁰

An intersectional analysis can be informed by developments in gender equality analysis, critical race analysis, disability rights analysis, and equality rights jurisprudence. These strategies have been developed to address the stereotypes and

20 Ontario Human Rights Commission <https://www.ohrc.on.ca/en/intersectional-approach-discrimination-addressing-multiple-grounds-human-rights-claims/applying-intersectional-approach>

unique and intersecting experiences of individuals because of race, gender, or disability. They would form a necessary part of the contextual and analytical framework. However, Runyan (2018) warns that a tokenistic approach could obscure the transformative intention of this approach and dilute the nature of inequalities without the impetus to use monitoring data to address the underlying structures that produce and sustain injustice. The relevance of this for monitoring systems is that a lack of critical equity data should be a concern for practitioners and management staff, as programmes with weak monitoring systems are not likely to be easily evaluable in terms of impact. Referring specifically to international development work Riddell (2014) argues that there is a lack of reliable, consistent, and robust programme information to answer whether development interventions work, partly because of inadequate baseline data and the often-weak monitoring upon which the assessment of impact is based.

A case in point is the stubborn persistence of gender-based violence (GBV), which is an increasingly visible societal challenge but is also one that yields concerning little data. Accurate and reliable generalised data on the prevalence and incidence of GBV has been notoriously difficult to collect. Therefore, it is challenging to analyse available data for evidence-driven and equity-oriented programming. The intersectionality lens disrupts this problem further by calling for a greater understanding of how GBV impacts women and girls based not just on their gender but also on intersecting identities such as race, class, locality, and sexual identity. Based on this, much work is needed to make monitoring systems more inclusive and more responsive to equity considerations. A key consideration arising from the GBV challenge is that data “talks about” victims and survivors rather than “talks with” them. The means and extent to which practitioners decide to develop monitoring systems, including indicators, depend on their specific aims. They can simply collect data, such as police statistics, about a particularly concerning societal issue such as GBV, or they can go a step further by making sure that primary stakeholders, particularly those who are typically marginalised or excluded, participate in some way in to inform monitoring processes and practices so that their experiences and understandings feed directly into social transformation agendas.

Building an Equity-Oriented M&E Practice

This chapter has attempted to outline some of the theoretical underpinnings of an equity-oriented M&E practice and has pointed to some of the initiatives being undertaken worldwide to pilot innovative approaches. For those training, working with, or mentoring emerging M&E practitioners, several critical interventions can lead to an impact in strengthened interest in and commitment to the theory and praxis of equity-led monitoring systems.

Building a Commitment to Equity

As technical systems, monitoring systems will be as effective or ineffective as allowed by their design and the ability of their practitioners. Ideally, the design of monitoring systems should be informed by equity issues. Monitoring systems also need to be appropriately geared to tracking the routine outcomes of policy and strategy provisions on equity issues of national concern at both the macro and the micro level. Examples of these include gender equality issues related to remuneration, financial independence, political participation, safety and security, sexual and reproductive health, and bodily integrity. Programme designers and M&E specialists are generally well-attuned to equity issues in the development sector, as their work often focuses on vulnerable, marginalised, and at-risk populations. Even though government service delivery in developing countries carries an immense equity burden, public sector agencies often lack adequate sensitisation and awareness around effective integration of equity and intersectionality considerations into their work. Monitoring systems may be characterised by data gaps that result in the needs of specific population segments being unintentionally overlooked or intentionally ignored. As an example, many countries see ethnic and religious minorities, political activists, members of the LGBTQIA+ community, and sex workers being heavily stigmatised, marginalised, or even criminalised, and deliberately excluded from national statistics. Emerging practitioners must learn to understand how power dynamics include and exclude people and how this impacts the quality and availability of equity-informed data.

Awareness-Raising, Values Clarification, and Responsibilities as a Public Servant

Public services operate as significant sources of employment within countries and have extremely diverse workforces. The ideal scenario from a public service and administration perspective is to ensure that those working as public servants are inducted, capacitated, and assessed according to conditions of employment and prevailing policies and regulations. In the South African context, this requires that public servants at all levels comply with constitutional mandates on core human rights and equity issues and that equity is integrated into planning and programming initiatives.

Government in-service capacity development programmes on equity-related issues are well established, although their efficacy has not been thoroughly evaluated. In South Africa, the National School of Government runs a range of in-service training programmes for public servants, including ones that cover issues such as human rights and gender mainstreaming, but the impact of many of these programmes is yet to be evaluated. However, it has created a context for organically building on work that has previously been conducted within public services to mainstream

gender as standard practice across all sectors and disciplines of government. For M&E practitioners, this should arguably have resulted in a better understanding of how to work with sex-disaggregated data and undertake gender-responsive data analysis work. If this assumption is correct, these understandings can be extended to include an equity and inclusion practice that uses intersectionality as a core monitoring tool. This involves the sensitisation of M&E practitioners regarding the value of increasing equity dimensions in their data products by using intersectional analysis in a strategic and targeted way.

The result of this process brings about an additional challenge that sees individuals within the workforce lacking the knowledge, skills, and integrity to proactively address certain equity issues that form a part of their work mandate. An example of this involves cases of healthcare workers who possess personal value systems, life experiences, and cultural backgrounds which contradict their obligation to provide non-discriminatory and non-stigmatising services. In many countries, Ministries of Health provide values clarification training for healthcare workers to sensitise them to human rights issues, inclusive care, and equitable health service provision. These kinds of interventions give healthcare providers a chance to examine their values, attitudes, and beliefs and change attitudes that hinder the service progress, while honing professionalism among the health workers. Perhaps the most challenging example here is the constitutional right that healthcare providers have in countries such as the United States and South Africa to refuse to provide legally-sanctioned abortions based on freedom of conscience, religion, and opinion. The same concerns could apply to M&E practitioners who may already have a negative predisposition to collecting and analysing monitoring data relating to specific population groups or actions. Working with equity and intersectionality issues presupposes that the following preconditions should ideally be in place:

- Pre-service and in-service education and training to provide adequate knowledge and understanding of equity issues integral to effective and efficient monitoring systems.
- Strengthening a theoretical understanding of how data can be used to drive equity-informed monitoring systems.
- Values clarification training is provided as a standard practice to support staff in reconciling personal value systems with the requirements of their job responsibilities.
- M&E managers are sufficiently capacitated to provide leadership, guidance, and mentorship to staff in applying equity-focused monitoring systems and using intersectionality and inclusion frameworks.

Building Technical Expertise

Typically, monitoring systems work with linear and unidimensional data points, which do not necessarily provide insight into the complex ways that inequalities operate at the individual, societal, and structural levels. Therefore, focusing on identities is only a part of the work that an equity-oriented practice requires. A composite indicator, such as the one used to populate the UN's Human Development Index, ranks countries annually based on their level of human development and is informative but incomplete as it reflects the effects of inequalities rather than the causes thereof.²¹ More difficult questions need to be addressed around structural inequality and the dynamics that create and maintain systems of identity-based inequality. This means understanding the drivers of inequality and the consequences of inequity in the real world for specific populations of people and how data does or does not evidence this. In the context of monitoring systems, practitioners need specific guidance and examples about how to import inclusion and intersectionality as analytical frameworks into their practice. This shift requires an express connection of individual experiences of discrimination with the structures of power and exclusion from which discrimination is bred. Reflexive consideration is required by practitioners of the systems and processes that they use, and how these may, by virtue of their design, perpetuate the use and application of equity-blind data.

An equity-informed framing of the monitoring practice can lead to a more analytical M&E practice that recognises groups of people as having multiple diverse and intersecting identities that impact how they understand and experience government initiatives and services. Public sector monitoring functions are normative and rule-based, providing routine evidence sets that feed into programme management processes. This iterative data collection process informs government decision-making in the context of policy-making programming and implementation. Data generated through statistical and M&E processes will routinely be disaggregated along a limited spectrum of variables, among other things gender, age, race, location, and employment status. A monitoring and evaluation officer coming into this environment will understand their role within the framework of such a normative, rule-based system and may not necessarily be aware of the wider potential of monitoring systems for driving an equity-informed practice.

Building technical capabilities to operationalise equity-informed practices should be integrated into pre-service and in-service education and training. This needs to happen in a very practical way, using approaches that have been designed in a range of different sectors to address equity considerations. Generally, researchers

21 The Human Development Index (HDI) is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living. The HDI is the geometric mean of normalized indices for each of the three dimensions. bit.ly/3rVbwTT

have relied primarily on qualitative methods to investigate intersectionality, raising questions about the epistemological and methodological possibilities of generating and using quantitative intersectionality data. In this regard, practitioners could engage with studies such as the one published in the *New England Journal of Medicine* that explores how gender and race influenced the referral of patients for cardiac catheterisation (Shulman et al. 1999). They had data on both race and gender and produced a statistical analysis. They did a “main effects” analysis in which they looked at the influence of gender, followed by looking at the influence of race. They then combined these main effects additively and created a chart that looked like the one in Figure 4 seen below:

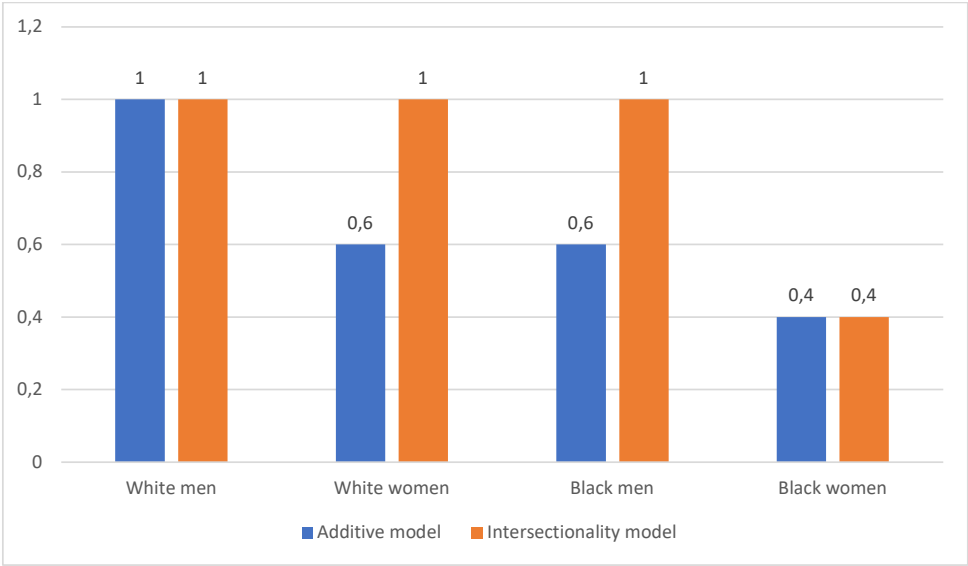


Figure 2.4: *Bowleg and Bauer, Using a quantitative intersectionality-based model, 2016*

Bowleg and Bauer (2016) have used this example to point out that adding together main effects such as gender and race does not produce an intersectional analysis. A different set of results is found when the analysis is redone using a quantitative intersectionality-based model. It quickly becomes apparent that the actual bias here is against black women. The initial incorrect results showing the lower odds ratios for white women and black men in the additive model included bias being shown to black women. As Rouhani (2014) notes, this happens because quantitative researchers traditionally seek to address issues of social inequity by investigating axes of inequity, such as race, gender, class, and sexuality, and only considering the potential interconnectedness of these axes. To build an intersectional model,

practitioners need to move beyond an additive model or algorithm that is built, for example, as **Outcome = Race + Gender + Sexual Orientation**. This model can be used to understand the effects of one of the predictors, such as sexual orientation, on the outcome while holding other predictors constant. Holding gender constant while looking at the impact of race and sexual orientation does not, however, tell us whether the impact of these individual characteristics differ when they are allowed to fluctuate. Alternatively stated, what is the effect of sexual orientation when gender is allowed to be either male or female? This is the nature of core questions of intersectional analysis. Intersectionality posits that experiences at an intersection are co-constituted and must be considered jointly. This distinction between additive and intersectional approaches maps onto quantitative distinctions between main effects and heterogeneity of effect (Hancock 2007). By adding an interaction term (essentially, multiplication), the new model now looks like **Outcome = Race * Gender * Sexual Orientation**. This model can answer how the outcome changes for different combinations of the variables by looking at all three predictors together rather than individually. The multiplication in the model accurately estimates the simultaneous and layered effects of the different variables. In an intersectionality-informed analysis, the additive approach is incorporated as an initial 'baseline' model, upon which further analyses are applied using multiplicativity to account for the conditional effects of intersecting categories on a social outcome (Rouhani 2014).

A key principle of equity in data and intersectional analysis involves acknowledgment that the inclusion of individual-level data alone frequently produces biased and incorrect results. Without any context, data analysis can yield incorrect and skewed data outcomes. For example, we may have national or sub-national level demographic data that tells us about the number of unemployed young women in the 18-to-24-year cohort, disaggregated by race. However, it tells us little about these women beyond those core variables. The building of an intersectional model involves taking additional steps to look at variables and data that measure the context and communities in which individuals are situated. For instance, in a model about the effects of age, gender, and refugee status on educational outcomes, it is important to include measures of how accepting each community is to refugees. It could also include variables measuring the availability of education in various languages, systemic regulations on gender and education, local levels of xenophobia, and other potential forms of human rights violations. Various statistical methods enable this type of analysis, the most common of which are multilevel models designed to include variables measured at the individual level and several broader levels of aggregation, such as community and country (Sage 2020). Like traditional regression, these models can include multiplication, not just addition, as posited by the intersectionality paradigm.

In her Primer on intersectional analysis, Rouhani (2014) includes an example exploring the intersectional effects of race, education, and urban area. The different urban areas have different policies, so this variable acts as a measure of structural level influence in the model. Researchers could conduct cross-contextual comparisons that would evaluate the impact of this policy across urban settings to empirically investigate how policy constructs the relative power and privileges within the system. This could be done through a comparison on cumulative years before and after the policy introduction throughout cities and states that enacted the legislation versus those that did not.

Table 2.2: *Rouhani, Applying an intersectional multiplicative approach, 2014*

		Odds Ratio			
		Chicago	Los Angeles	New York	San Francisco
Race X education interactions					
Black	OR less than high school	3.280	1.752	2.580	4.850
	OR high school graduate	1.896	1.200	1.950	2.540
	OR some college	1.461	1.390	1.428	2.102
	OR college graduate (ref)	1.000	1.000	1.000	1.000
White	OR less than high school	2.133	1.450	1.890	3.504
	OR high school graduate	1.621	1.325	1.450	2.320
	OR some college	1.181	1.120	1.320	1.950
	OR college graduate (ref)	1.000	1.000	1.000	1.000

There are packages and examples of multiplicative and multilevel models that can be used by M&E practitioners to add an intersectional analysis to their work which are available in most standard statistical packages. There is one example using R on multiplication or interactions as well as one on multilevel modelling. For SPSS users, there is one on interactions and one on multilevel modelling as well.

In reality, individuals are not single data points (e.g., male or female, literate or illiterate), and no individual lives one of their characteristics at a time. Our lived experiences are a simultaneous combination of all our characteristics and experiences. If we want to use data to reflect people’s lived experiences more accurately, then we need to use it in combination with other data sets. This is a multiplicative approach and allows us to see how different characteristics are interacting or intersecting and then enables us to better analyse the positionality of an individual within a society. The use of multiplicative models allows practitioners

to see how different characteristics are interacting or intersecting (Krause 2021). When this frame is used as an equity-oriented monitoring tool, the data shows that cumulative marginalisation is much stronger than the marginalisation of one group at a time. When individuals are members of more than one marginalised group, the effect can be cumulative, as illustrated in Figure 5 below:

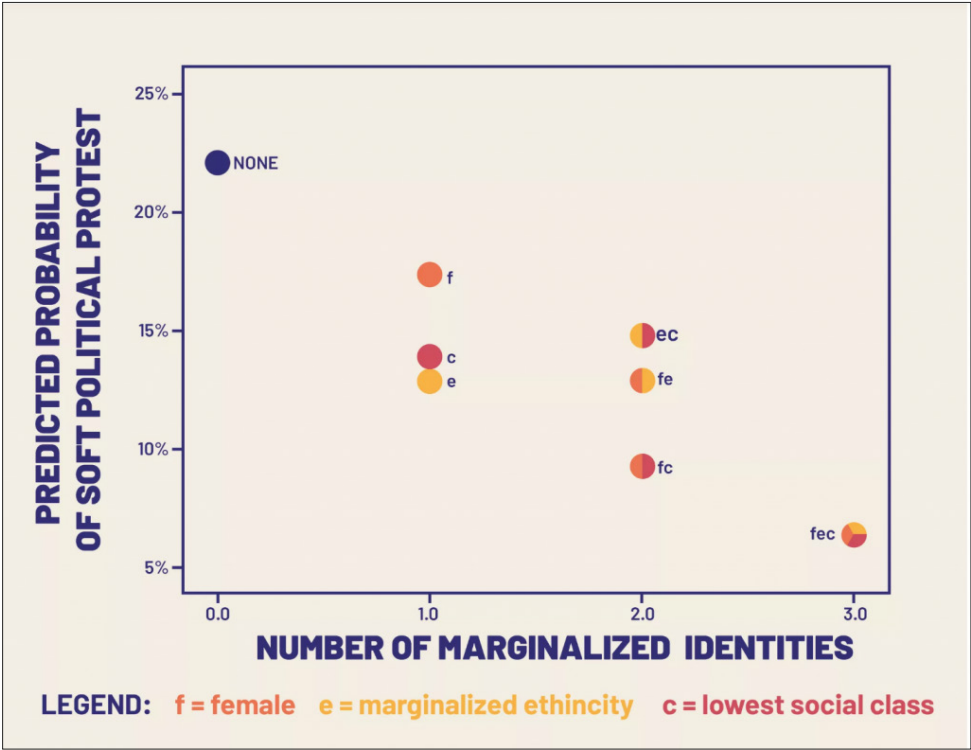


Figure 2.5: *Krause, Applying the multiplicative approach to demonstrate cumulative marginalisation, 2021*

This kind of mapping demonstrates the effects of cumulative marginalisation. The more marginalised identities a person holds, the higher the order of intersection and the lower their probability of being treated equitably. Figure 5 looks at the cumulative marginality of women and the likelihood of their engagement in political activism. From the chart, it is possible to see that a woman has a probability of 17% regarding active involvement. The probability of a woman from the lowest social class getting involved is 9%. However, a woman from the lowest social class and belonging to the marginalised ethnic group has a 7% probability of getting involved. In this example, data is used multiplicatively instead of additively to highlight the lived experience of cumulative marginalisation. Using complex, multi-layered demographic data

in research and monitoring systems is not always simple. However, it is crucial to ensure that the work being done is equitable and that it gives practitioners a more granular understanding of the issues they are working with.

Conclusion

Arguably, M&E systems within government are slow to respond to trends and innovations around M&E within development, civil society, and academic sectors. The major players in the development field, including the World Bank, the regional banks, the OECD, the UN agencies, and international NGOs, are undoubtedly leaders in the development of equity-responsive monitoring and evaluation systems. In many cases, they work alongside government entities to strengthen monitoring systems in raising efficacy in the collection, processing, and utilisation of equity-informed data. Development agencies and other academic and civil society organisations working at the forefront of monitoring and evaluation innovation can only do so much. Governments have the mandate and the obligation to provide for their most vulnerable and marginalised populations through evidence informed and equity-driven policymaking and programming. Government M&E systems in Africa can also draw on cutting edge work that is being done through the auspices of organisations such as AfrEA and Twende Mbele on the development of indigenous and Afrocentric M&E practices that focus on equity as a core epistemological framework.

This chapter has attempted to provide reflections on how practitioners working in the public service can broaden their thinking about their practice and has suggested how routine monitoring systems can expand their remit by integrating methodologies for measuring equity, inclusion, and intersectionality.

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