

## Approach Paper

# Mid-Term Review of the World Bank Group's Gender Strategy (FY16–23)

March 12, 2020

## 1. Context and Rationale

1.1 The World Bank Group's gender strategy for fiscal year (FY)16–23 presents gender equality as integral to smart development policy (World Bank Group 2015). Successful implementation of the strategy will contribute to the Bank Group achievement of the twin goals and the Sustainable Development Goals. The strategy focuses on four objectives: human endowments, jobs, asset control/ownership, and voice/agency (see box 1.1) and sets new targets, establishes a new methodology for measuring progress, and outlines opportunities to make the Bank Group more transformational in its work.

1.3 At the midpoint in the eight-year strategic cycle, this review is an assessment of implementation and will reflect on what is working well and what is not in key areas. Because of constrained timelines, this will be a rapid, light-touch exercise compared with a full evaluation. Different elements of the assessment are being undertaken by the Independent Evaluation Group (IEG) and Group Internal Audit (GIA)<sup>1</sup> and will feed into the Bank Group's Mid-Term Review to maximize the potential of the Strategy over its final four years of implementation. The World Bank Gender Group and the International Finance Corporation (IFC) Gender Business Group produced an initial Terms of Reference for IEG and GIA. IEG focused the design to reasonably align with these Terms of Reference.

To implement the strategy, Global Practices (GPs), IFC industry groups, and regional teams—with the support of the Gender Group in the World Bank and IFC Gender Business Group—sought ways to close gender gaps across the four strategic objectives.<sup>2</sup> Some of the activities implemented included World Bank GP follow-up notes, Regional Gender Action Plans, IFC implementation plans, country gender action plans and

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<sup>1</sup> Group Internal Audit would review the internal business model and accountability structures, including how internal processes and operations are influencing the implementation of the strategy, how human and financial resources have been aligned with these processes, and if this has resulted in greater effectiveness.

<sup>2</sup> The way the Gender Global Theme is currently organized and receives support has been reconfigured several times since 2015.

platforms (South Asia and East Asia and Pacific), an impact evaluation by Gender Innovation Labs, and IFC innovations.

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### Box 1.1. Evolution of the Gender Strategy

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The World Bank Group's current strategy (FY16–23) builds on the approach adopted under its 2001 strategy, which called for country and task teams to incorporate a gender lens in relevant design and objectives (World Bank Group 2015). The strategy also reflects both changes in the global landscape and available evidence about what works with a view to closing gender gaps. The FY16–23 strategy builds on the *World Development Report 2012: Gender Equality and Development*, which focused on three interconnected domains of gender equality: human endowments, economic opportunity, and voice and agency (World Bank 2011). Building on the findings of the *World Development Report 2012*, the strategy focuses on four strategic objectives:

- Improving human endowments,
- Removing constraints for more and better jobs,
- Removing barriers to women's ownership of and control over assets, and
- Enhancing women's voice and agency and engaging men and boys.

The strategy set out to raise the performance bar for the World Bank and the International Finance Corporation by focusing on the outcomes, results, and monitoring of Bank Group-supported interventions by clients. To achieve these objectives, the strategy is operationalized across five pathways:

- Strengthening the country-driven approach, with better country-level diagnostics, policy dialogue, and sex-disaggregated data
- Developing a better understanding of what works for gender equality, by enriching the evidence base
- Building more systematically on what works, by bringing the evidence to task teams and clients
- Adopting a strategic approach to mainstreaming that helps achieve results in client countries, including a more robust monitoring system
- Leveraging partnerships for effective outcomes, particularly with key UN agencies and the private sector.

*Source:* World Bank 2011, 2015.

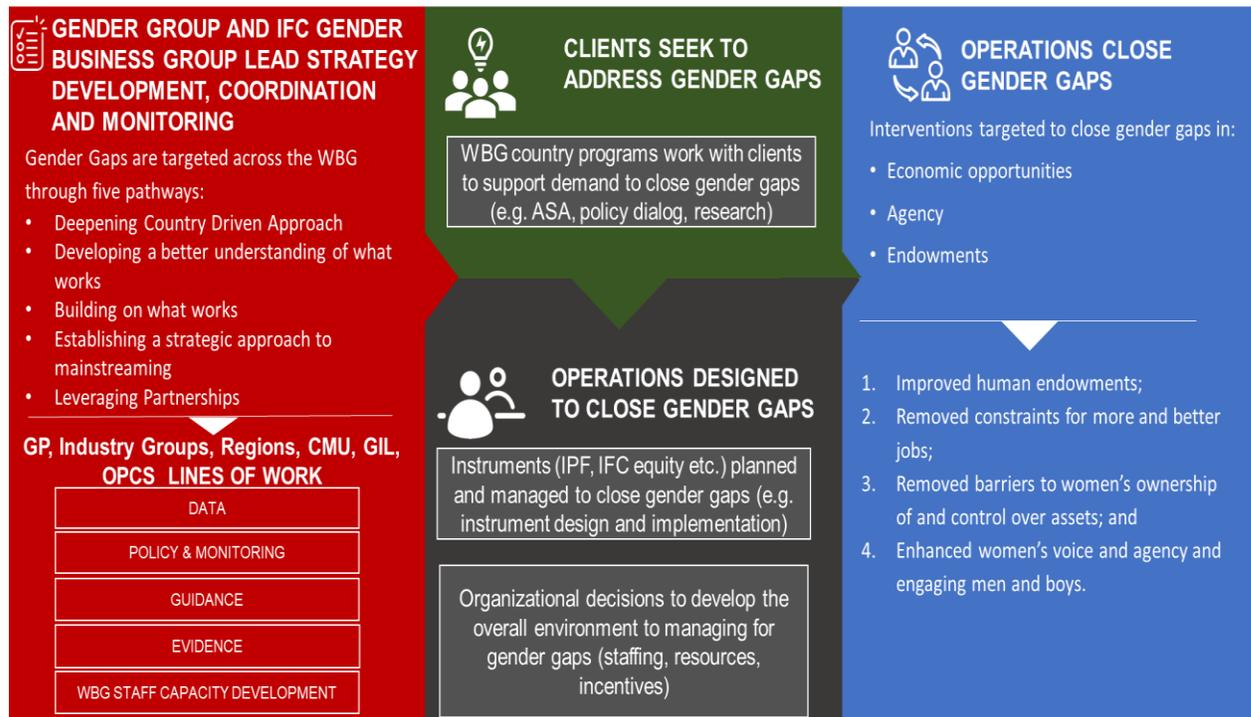
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1.4 IEG's reading of the logic of the of the strategy, which is further developed in figure 1.1, is as follows:

- If processes, guidance, and evidence are focused on closing of gender gaps, then the World Bank and IFC will consistently work with clients to close gender gaps in operations and country diagnostics.

- If instruments and organizational decisions (staff, resources, processes, incentives) promote closing gender gaps in design and implementation consistently, then there will be an improvement in development outcomes among markets, households, and institutions (to be evaluated after the strategy has concluded).

Figure 1.1. Initial Gender Strategy Theory of Change



Source: Independent Evaluation Group interpretation of strategy.

1.5 A more refined understanding of the strategy will be developed to guide data collection and analysis and will be presented in the final report to reflect the actual implementation.

## 2. Purpose, Scope, and Audience

2.1 The purpose of IEG's review is to provide evidence and lessons on what is working and where challenges remain in maximizing the organizational effort to close gender gaps. The evaluation will seek to

- Understand how the strategy has been translated into practice through discussions with the World Bank Gender Group, IFC's Gender Business Group, and others;

- Identify factors that enable and constrain Bank Group operational practices and that seek to close gender gaps at country, GP or industry, regional, and corporate levels; and
- Summarize and validate key areas of feedback.

2.2 This review will not seek to verify outcomes in countries because time to collect data is limited and limited evidence to examine the effectiveness of support. The evaluation will also not assess partnerships nor changes in client practices. Perceptions of client demand will be examined through interviews with informants in the Bank Group.

2.3 The main audiences of this review are the World Bank Group Board of Directors, Bank Group senior management (that is, the matrix vice presidents, the Gender Group [World Bank] and Gender Business Group [IFC] and their associated vice presidential units). Secondary audiences are the staff and managers within units tasked with implementing the gender strategy, Operations Policy and Country Services, CMUs, and GPs and IFC Regional/Industry Departments. Findings may also be relevant to donor agencies who design and finance investments to close gender gaps, as well as researchers and staff in Ministries in World Bank client countries.

### **3. Evaluation Questions**

3.1 The review will answer one overarching question that will be focused through subquestions:

**EQ1:** How well is the implementation of the strategy positioning the Bank Group to close key gender gaps?

- How do the knowledge products from the Gender Group, Gender Business Group, Gender Innovation Lab, and GPs serve the needs of operational teams and industry groups?
- How valuable has the support of gender experts (leads, focal points, Gender Business Group and Gender Group staff) been for operational teams and industry groups?
- How is monitoring of the strategy and corporate commitments incentivizing operational teams and industry groups to close gender gaps?
- What enablers and constraints need to be addressed in the implementation of the strategy?

## 4. Methodological Approach

4.1 Interviews and focus groups across multiple stakeholders in the Bank Group is the predominant source of evidence being collected. The review will interview more than 75 respondents at country and corporate levels (see appendix B). Respondents will be selected to also discuss regional projects and programs focused on gender and special initiatives such as We-Fi, which is one of the largest funding mechanisms for female entrepreneurship. In addition, regional focus groups and key informant interviews will be conducted with task team leaders, investment officers, and project managers sampled among a range of GPs and IFC industry groups. Across interviews, we will examine how knowledge, monitoring, and support enable or constrain the implementation of the strategy to address key gender gaps during design and implementation. Findings from the stakeholder interviews will be triangulated with other evidence to answer the evaluation questions:

- Review and reanalysis of existing gender tag and gender flag data.
- Previous IEG reports (such as Results and Performance of the World Bank Group 2015 [2016]; the gender management action record; World Bank Group Assistance to Low-Income Fragile and Conflict-Affected States [2014]; Learning and Results in World Bank Operations: How the Bank Learns [2014]; Knowledge Flow and Collaboration under the World Bank's New Operating Model [2019]) to provide evidence of gender strategy implementation and how to translate learning into practice and scale up.

4.2 The country sample incorporates a range of GPs and industry groups. The sample seeks to improve learning through variation in the following areas:

- Operational coverage of gender gaps within project approved since FY17
- Extent of gender tagging and flagging
- Level of gender inequality (with a weighting toward lower gender inequality)
- Country portfolio composition (for example, size, number of GPs and industry groups with projects) for World Bank and IFC
- Engagement in the gender strategy formulation
- Fragile and Conflict-affected Situations (FCS) countries
- International Development Association recipients

4.3 Table 4.1 provides a list of the seven countries in the sample. The sample is weighted toward the Africa region but comprises one country from the remaining regions to increase the depth of regional learning.

Table 4.1 Country Sample

Country	Region	GPs (no.)	Gender Tagged of approved projects <sup>3</sup> (percent)	Active Portfolio tagged (percent)	Gender Gap Index	Consulted on Gender Strategy	IFC Gender Flag AS	IFC Gender Flag IS	FCV	Gender Gaps Targeted (out of 4)	Finance
Côte d'Ivoire	AFR	13	74 (14/19)	50	142	Yes	Yes	Yes	Yes	4	IDA, HIPC
Kenya	AFR	14	50 (7/14)	27	109	Yes	Yes	Yes	No	3	Blend
Vietnam	EAP	10	56 (9/16)	28	31	No	Yes	Yes	No	4	IBRD
Tajikistan	ECA	11	75 (6/8)	44	134	No	Yes	No	No	1	IDA
Peru	LCR	8	29 (2/7)	13	90	No	Yes	No	No	1	IBRD
Egypt, Arab Rep.	MNA	10	75 (6/8)	39	140	No	Yes	No	No	2	IBRD
Bangladesh	SAR	14	77 (24/31)	51	141	No	Yes	Yes	No	4	IDA

Sources: Standard Reports Gender Tag FY17–20, Gender Group Gender Tag Analysis FY17–FY19Q2, Gender Business Group Flag Data for IS and AS, UNDP Gender Inequality Index, World Bank Gender Strategy Consultations.

Note: AS = Advisory Services; AFR = Africa; EAP = East Asia and Pacific; ECA = Europe and Central Asia; FCV = fragility, conflict, and violence; GP = Global Practice; HIPC = heavily indebted poor countries; IBRD = International Bank for Reconstruction and Development; IDA = International Development Association; IFC = International Finance Corporation; IS = Investment Services; LAC = Latin America and the Caribbean; MNA = Middle East and North Africa; SAR = South Asia.

<sup>3</sup> These data represent fiscal year 2017 to the second quarter of fiscal year 2019 and was agreed with Global Practices.

4.4 Data collection and analysis focus on understanding which designed and implemented activities work toward closing gender gaps and why. IEG will identify positive, negative, intended, or unintended changes that have taken place, and factors that enable and constrain.

4.5 The evaluation faces one major constraint. The data collection timeline is short (approximately three weeks), which limits the amount of data that can feasibly be collected and analyzed. For this reason, the scope of this evaluation has been limited from the Terms of Reference prepared by the Gender Group.

4.6 This review will be subject to IEG's standard quality review. The processes will be implemented with agility, given the expected timeline. To expediate the process, a virtual review will be held at the beginning and end stage. The external peer reviewers are Svetlana Negroustoueva (principal evaluation officer at the African Development Bank) and Jonathan Rose (lead economist at the Office of Evaluation and Oversight, Inter-American Development Bank). The team will follow IEG's quality assurance process and work closely with IEG's Methods Advisory Team during all phases of the review.

## **5. Expected Outputs**

5.1 The main output will be a concise report containing the main findings of what is working successfully (or less successfully) in the implementation of the strategy, why, and actionable considerations to feed into management decision processes.

## **6. Modus Operandi**

6.2 In delivering this review, the independence of IEG and its collaboration with GIA and the World Bank Gender Group and IFC Gender Business Group are of relevance. For this reason, IEG will collaborate with the Gender Group and the Gender Business Group in IFC through periodic check-ins. When preliminary findings are available, IEG will invite representatives from the Gender Group, Gender Business Group, regions, and GPs to a meeting to provide informal feedback.

6.3 Although the focus of GIA's and IEG's work is quite distinct, we do anticipate overlaps in interviews with stakeholders. These will be managed through agreed procedures and weekly task team leader meetings. During these meetings, IEG and GIA will share interview lists so duplication in the sample is minimized.

6.4 In accordance with the Bank Group evaluation principles, IEG works in a manner that is structurally, functionally, and behaviorally independent. Similarly, IEG maintains its independence in the design, analysis, and writing of the report. GIA will develop its own advisory assessment report. IEG will maintain existing protocols established with the Bank Group. IEG may draw on and present relevant findings from GIA in its report.

## **7. Resources and Timeline**

7.1 Under the direction and guidance of Oscar Calvo-Gonzalez (director) and Galina Sotirova (manager), the review will be prepared by a team led by Susan Caceres (co-task team leader) and Stephen Porter (co-task team leader). Team members will include Aurora Medina, who will be focused on IFC, and Elena Bardasi will act as a senior adviser to the review. Short-term consultants Anthony Tyrrell, Daniel Palazov, Disha Zaidi, Eija Pehu, and Donna Podems will support data collection and analysis. Yezena Yimer will provide administrative support. The review will be prepared with an estimated budget of \$300,000. Table 7.1 presents the timeline and the main activities in the review. The report will be finalized and submitted to the Bank Group in the fourth quarter of this fiscal year (FY20).

**Table 7.1. Tasks and Timeline**

Task	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
Conceptualization	Brainstorming							
Concept note and quality assurance	Write concept note		Virtual review and send concept note to World Bank Group					
Data collection			Protocol development	Interviews focus group				
Data analysis						Triangulation of data		
Report					Develop content plan and messages	Report review by manager and director	Send report to World Bank Group	
					Write report	Submit draft findings	Finalize report	
						Independent Evaluation Group review of report		
Completion								Committee on Development Effectiveness meeting

## References

World Bank. 2012. *World Development Report 2012: Gender Equality and Development*. Washington, DC: World Bank.

World Bank. 2015. *World Bank Group Gender Strategy (FY16–23): Gender Equality, Poverty Reduction, and Inclusive Growth*. Washington, DC: World Bank Group.



## Appendix A. Interviews

Table A.1. Country-Level Interviews

Interviewees	Respondents (no.)	Reason	Method
Task team leaders, investment officers, and project managers	6 to 9 per country	Understand drivers and current status of implementation	Interview
Country director, IFC country manager and regional director	1–2 per country	Understand client demand and Bank Group approach	Interview
Gender focal point / IFC regional gender lead	2–5 per country	Understand approach in country	Interview

Note: IFC = International Finance Corporation.

Table A.2. Corporate and Regional Sample Interviews

Interviewees	Respondents (no.)	Reason	Method
World Bank regional front office staff and IFC regional management	6–10	Understand regional approach and drivers	Interview
Task team leaders, investment officers, and project managers	3–6 per region various Global Practices or IFC industries	Understand strategy implementation	Focus Groups or Interview
Practice managers or IFC industries	3–5 per region various Global Practices or IFC industries	Provide regional and sector/industry perspective on strategy implementation, client demand and World Bank Group approach	Interviews
Staff from Gender Innovation Labs and regional platforms	3–5	Provide perspectives on knowledge and strategy implementation	Interview
World Bank Gender Group and IFC Gender Business Group	3–5 from each Gender Group	Understand strategy implementation	Interview
Gender Leadership Council	3–5	Understand strategy implementation	Interview

<b>Interviewees</b>	<b>Respondents (no.)</b>	<b>Reason</b>	<b>Method</b>
World Bank and IFC gender champions/leads/focal points	5–10	Sector/industry and regional knowledge and experience supporting strategy	Interview
Other Units (vice presidents, G7/G20 Liaison Group, DEC, key donors or partners—Department for International Development, Canada, Sweden)	5–10	Provide perspective on interaction with strategy	Interviews

*Note:* G7/G20 = Group of Seven/Group of Twenty; IFC = International Finance Corporation.

## Appendix B. Design Matrix

Key Questions	Data Collection and Analysis		Limitations
	Methods	Sampling and Selection	
How well is the implementation of the Strategy positioning the Bank Group to close key gender gaps?			
How do the knowledge products from the (Gender Group, Gender Business Group, GILs) serve the needs of operational teams and Industry groups?	Focus groups and interviews	<p>Seven-country sample to include the following: TTLs, IOs, CD and IFC CM, gender focal point or IFC regional gender lead</p> <p>Sample among the following: World Bank regional front office staff and IFC regional management; TTLs and IO; practice managers or IFC industries; staff from GILs and regional platforms; World Bank Gender Group and IFC Gender Business Group; Gender Leadership Council; World Bank and IFC Gender Groups</p>	Limited sample
How valuable has the support of gender experts (leads, focal points, Gender Business Group and Gender Group staff) been for operational teams and Industry groups?	Focus groups and interviews	<p>Champions/leads/focal points; key donors or partners</p> <p>Seven-country sample to include the following: TTLs, IOs, CD and IFC CM, gender focal point or IFC regional gender lead</p> <p>Sample among the following: World Bank regional front office staff and IFC regional management; TTLs and IO; practice managers or IFC industries; staff from GILs and regional platforms; World Bank Gender Group and IFC Gender Business Group; Gender</p>	Limited sample

Key Questions	Data Collection and Analysis		
	Methods	Sampling and Selection	Limitations
How is monitoring of the Strategy and corporate commitments incentivizing operational teams and Industry groups to close gender gaps		Leadership Council; World Bank and IFC Gender	
		Champions/leads/focal points; key donors or partners	
	Review of gender tag and gender flag data	Seven-country sample to include the following: TTLs, IOs, CD and IFC CM, gender focal point or IFC regional gender lead	Gaps in Gender Tag/Flag data  Insufficient completed ISRs
	Focus groups and interviews		
What enablers and constraints need to be addressed in the implementation of the Strategy?	Review of indicators with sampled projects in seven countries	Sample among the following: World Bank regional front office staff and IFC regional management; TTLs and IO; practice managers or IFC industries; staff from GILs and regional platforms; World Bank Gender Group and IFC Gender Business Group; Gender Leadership Council; World Bank and IFC Gender Groups	
		Champions/leads/focal points; key donors or partners	
	Focus groups and interviews	Seven-country sample to include the following: TTLs, IOs, CD and IFC CM, gender focal point or IFC regional gender lead	Limited sample
		Sample among the following: World Bank regional front office staff and IFC regional management; TTLs and IO; practice managers or IFC industries; staff from GILs and regional platforms; World Bank Gender Group and IFC	

Key Questions	Data Collection and Analysis		
	Methods	Sampling and Selection	Limitations
		Gender Business Group; Gender Leadership Council; World Bank and IFC Gender Groups	
		Champions/leads/focal points; key donors or partners	

*Note:* CD = country director; CM = country manager; GILs = Gender Innovation Labs; IFC = International Finance Corporation; IO = investment officer; TTL = task team leader.