

# Making CGIAR Evaluations Gender Responsive and Inclusive

**Integrating Gender Equality Youth and Social Inclusion  
(GEYSI) & Gender Diversity and Inclusion (GDI)**

CGIAR Evaluation Guidelines



CGIAR Independent Advisory and Evaluation Service (IAES). 2025. Making CGIAR Evaluations Gender Responsive and Inclusive: Integrating Gender Equality Youth and Social Inclusion (GEYSI) & Gender Diversity and Inclusion (GDI) into CGIAR Evaluations. Guidelines and Toolkit. (Beta Version) Rome: IAES Evaluation Function

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Guidelines and Toolkit (Beta Version)

November 2025

| Name of Guidelines    Making CGIAR Evaluations Gender Responsive and Inclusive. Beta Version |                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Purpose                                                                                      | To provide guidance on how to integrate GEYSI and GDI/C&E into CGIAR evaluations.                                                                                                                                                                                                                     |
| Audience                                                                                     | Evaluators, evaluation managers and commissioners are the primary audiences involved in CGIAR evaluations. The secondary audience includes those responsible for providing input into evaluations in the CGIAR. Users in other research-for-development (R4D) contexts may find this document useful. |
| Framework and Policy Reference                                                               | Guidance supports the new <a href="#">CGIAR Evaluation Framework</a> and the CGIAR <a href="#">Evaluation Policy (2022)</a> and should be read in conjunction with other <a href="#">evaluation-related guidelines</a> .                                                                              |
| Contact:                                                                                     | The Evaluation Function within the Independent Advisory and Evaluation Service (IAES).<br>Email: <a href="mailto:IAES-Evaluations@cgiar.org">IAES-Evaluations@cgiar.org</a> .                                                                                                                         |

## Acknowledgments

The Evaluation function of the Independent Advisory and Evaluation Services (IAES) co-developed the beta-version of the guidelines based on the review of internal and external resources and after pretesting during the evaluations of the Science groups (2024, see [blog](#)). Katie Sproule and Donna Podems (consultants) led the process, with final support from Sara Vaca and review by the IAES Senior Evaluation Manager, Ibtissem Jouini. The overall direction and QA were provided by Evaluation Function Lead, Svetlana Negroustoueva, under the oversight of IAES Director, Allison Grove Smith.

External review was provided by Sonal Zaveri, current member of the IAES [Evaluation Reference Group](#). Throughout development, support was provided by Lizzy Sweitzer, Samriti Maharjan, Alpaxee Kashyap, and Lea Corsetti. The IAES staff in Rome provided great support, ensuring the smooth conduct of technical and administrative processes related to developing these guidelines.

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# Acronyms and Abbreviations

|        |                                                              |
|--------|--------------------------------------------------------------|
| AR4D   | Agricultural Research for Development                        |
| C&E    | Culture & Engagement                                         |
| CGIAR  | Consultative Group on International Agricultural Research    |
| EA     | Evaluability Assessment                                      |
| FAO    | Food and Agriculture Organization                            |
| FLWS   | Food, Land, Water Systems                                    |
| GAC    | Global Affairs Canada                                        |
| GDI    | Gender, Diversity, and Inclusion                             |
| GENDER | Generating Evidence and New Directions for Equitable Results |
| GEYSI  | Gender Equality, Youth, and Social Inclusion                 |
| GI     | Genetic Innovation                                           |
| IFA    | Integration Framework Agreement                              |
| IFAD   | International Fund for Agricultural Development              |
| ILO    | International Labor Organization                             |
| IOM    | International Organization for Migration                     |
| IWMI   | International Water Management Institute                     |
| M&E    | Monitoring and Evaluation                                    |
| MELIA  | Monitoring, Evaluation, and Learning Impact Assessment       |
| OECD   | Organization for Economic Cooperation and Development        |
| PRMF   | Performance and Results Management Framework                 |
| PRMS   | Performance and Results Management System                    |
| QOR4D  | Quality of Research for Development                          |
| QoS    | Quality of Science                                           |
| R4D    | Research for Development                                     |
| RAFS   | Resilient Agrifood Systems                                   |
| SDG    | Sustainable Development Goal                                 |
| SAMEA  | South African M&E Association                                |
| SG     | Science Group                                                |
| ST     | Systems Transformation                                       |
| ToC    | Theory of change                                             |
| ToR    | Terms of Reference                                           |
| UNEG   | United Nations Evaluation Group                              |

# Glossary of Key Terms

|                                              | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Source                                                                                                            |
|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Evaluation</b>                            | The systematic and objective assessment of an on-going or completed project, program, initiative or policy, its design, implementation, and results. In CGIAR, evaluation refers to an external, completely (commissioned by the CGIAR System Council for implementation through the IAES Evaluation Function) or largely independent and systematic study of an in-depth nature that uses evaluation criteria in line with the <a href="#">Evaluation Policy, CGIAR 2022</a> .                                                                                                                                                                                                                                                              | <a href="#">Monitoring, Evaluation, Learning and Impact Assessment (MELIA) Glossary</a> <sup>1</sup>              |
| <b>Gender</b>                                | Gender refers to the roles, behaviors, activities, and attributes that society considers appropriate for men and women. It includes the social opportunities linked to being male or female, the relationships between women and men, and also among women and among men. Gender shapes what is expected, allowed, and valued for each in a given context. It is part of a broader socio-cultural system that also includes factors such as class, race, poverty, ethnicity, sexual orientation, and age.                                                                                                                                                                                                                                    | Office of the Special Adviser on Gender Issues (OSAGI) Gender Mainstreaming-Concepts and Definitions <sup>2</sup> |
| <b>Gender Equality</b>                       | The equal rights, responsibilities and opportunities of women and men and girls and boys. Equality does not mean that women and men will become the same but that women's and men's rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration, recognizing the diversity of different groups of women and men. Equality between women and men is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centered development. Sustainable Development Goal (SDG) 5 is to "Achieve gender equality and empower all women and girls." | OSAGI Gender Mainstreaming-Concepts and Definitions <sup>3</sup>                                                  |
| <b>Gender, Diversity and Inclusion (GDI)</b> | Refers to the workplace context within CGIAR (i.e., including all staff—not only those implementing the Research Portfolio). Diversity refers to workplace demographics (e.g., nationality, sex). Inclusion refers to a dynamic state of operating in which diversity is leveraged to create a welcoming, fair, healthy, and high-performing organization or community. <sup>4</sup>                                                                                                                                                                                                                                                                                                                                                         | 2023–24 GDI Action Plan and 2025–27 Culture & Engagement (C&E) plan <sup>5</sup>                                  |
| <b>Gender Tagging</b>                        | Assesses CGIAR outputs (capacity sharing for development, innovation development, knowledge products, other outputs) and outcomes (capacity change, innovation use, policy change, other outcomes) to assign a category: <ul style="list-style-type: none"> <li>Not targeted (0): The activity has been screened against the marker but has not been found to target any of the CGIAR's gender equality objectives.</li> <li>Significant (1): Gender equality is an important and deliberate objective, but not the principal reason for undertaking the activity.</li> <li>Principal (2): Gender equality is the main objective of the activity and is fundamental in its design and expected outcome.</li> </ul>                           | <a href="#">Development Assistance Committee (DAC) gender equality policy marker</a>                              |

<sup>1</sup> CGIAR. (2021). [Monitoring, Evaluation, Learning and Impact Assessment \(MELIA\) Glossary](#) (version 5).

<sup>2</sup> UN Women. (n.d.). [Gender Mainstreaming. Concepts and Definitions](#). Retrieved 2 October 2023.

<sup>3</sup> Ibid.

<sup>4</sup> CGIAR. (2022). [Annual Report 2022: Our People and Culture](#).

<sup>5</sup> [Action Plan for Advancing Gender Equity, Diversity and Inclusion in CGIAR's Workplaces: Activities and Key Indicators to Measure Progress, 2023–24; CGIAR's C&E Action Plan, 2025–27](#).

|                                            | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Source                                                                          |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| <b>Impact Area<sup>6</sup></b>             | Refers to a high-level, long-term goal that guides CGIAR's research and innovation, they are directly linked to UN <sup>7</sup> . The five Impact Areas are: (1) Nutrition, Health and Food Security; (2) Poverty Reduction, Livelihoods and Jobs; (3) Gender Equality, Youth and Social Inclusion; (4) Climate Adaptation and Mitigation; and (5) Environmental Health and Biodiversity.                                                                                                                  | <a href="#">MELIA Glossary</a> ,<br><br><a href="#">CGIAR Portfolio 2025-30</a> |
| <b>Program MELIA</b>                       | MELIA studies are used to test program assumptions, inform learning and adaptive management, meet accountability requirements, and inform the design of new Initiatives.                                                                                                                                                                                                                                                                                                                                   | MELIA Glossary <sup>8</sup>                                                     |
| <b>Process and performance evaluations</b> | Process Evaluation: Assesses how a CGIAR Initiative or activity is implemented, including delivery processes, stakeholder engagement, operational fidelity, and contextual enablers or barriers to execution.<br>Performance Evaluation: Examines the extent to which a CGIAR Initiative achieves its intended results, often addressing dimensions such as relevance, effectiveness, efficiency, and sustainability. A performance evaluation may include aspects of both process and outcome evaluation. | <a href="#">CGIAR Evaluation Policy</a> (2022)                                  |
| <b>Monitoring</b>                          | A process of continuous or periodic collection and analysis of data to compare how well a project, program, or policy is being implemented against expected progress and results, to track performance against plans and targets, to identify reasons for under or over achievement, and to take necessary actions to improve performance.                                                                                                                                                                 | <a href="#">MELIA Glossary</a> ,                                                |
| <b>Theory of change (ToC)</b>              | A comprehensive description of how and why a desired change is expected to happen in a specific context. It maps the causal pathways from inputs and activities to outcomes and impacts, making explicit the assumptions, contextual factors, and linkages between steps.                                                                                                                                                                                                                                  | -                                                                               |
| <b>Logic framework</b>                     | A simplified, often visual tool that outlines the logical sequence of inputs, activities, outputs, outcomes, and impacts of a program. Unlike a ToC, it typically does not articulate underlying assumptions or external influences.                                                                                                                                                                                                                                                                       | -                                                                               |
| <b>Programs/ Accelerators</b>              | Key delivery mechanisms for intended to strengthen and accelerate the implementation of CGIAR's 2030 Strategy, with the overall goal of addressing major global challenges by leveraging the collective capabilities of all CGIAR research centers.                                                                                                                                                                                                                                                        | <a href="#">CGIAR Portfolio Narrative 2025-30</a>                               |
| <b>Sex</b>                                 | The biological characteristics that distinguish males and females and identified on a person's birth certificate.                                                                                                                                                                                                                                                                                                                                                                                          | UN Women Training Center-Gender Equality Glossary <sup>9</sup>                  |
| <b>CGIAR Results Framework</b>             | The program logic explains how the development objective is to be achieved, including causal relationships and underlying assumptions. Related terms: results chain, logical framework.                                                                                                                                                                                                                                                                                                                    | MELIA Glossary <sup>10</sup>                                                    |

<sup>6</sup> [CGIAR Research Initiatives: Transforming Food, Land and Water Systems in a Climate Crisis. Impact Areas](#).

<sup>7</sup> [CGIAR Research Portfolio 2025-30](#).

<sup>8</sup> CGIAR. (2021). [Monitoring, Evaluation, Learning and Impact Assessment \(MELIA\) Glossary](#) (version 5).

<sup>9</sup> UN Women. (2023). [Training Center. Gender Equality Glossary](#).

<sup>10</sup> CGIAR. (2021). [Monitoring, Evaluation, Learning and Impact Assessment \(MELIA\) Glossary](#) (version 5).

# 1. Introduction

## 1.1. CGIAR Context

CGIAR is a global research partnership for a food-secure future with a mission to deliver science and innovation to transform food, land, and water (FLW) systems in a climate crisis. Aligned to the [2030 CGIAR Research and Innovation Strategy](#), a 2022–24 portfolio was structured around three Science Groups (SGs), and from 2025, 13 Programs and Accelerators in the [Portfolio 2025–30](#). Portfolio revisions were accompanied by revisions of the [organizational structure](#).

To ensure alignment with gender-responsive and human-rights-based evaluation standards (UNEG-GEHR, UN Women), evaluations in CGIAR explicitly adhere to principles of intersectionality, participation, power analysis, and ethical inclusion across all evaluation phases.

**Figure 1. CGIAR Impact Areas**



**CGIAR and gender equality, youth and social inclusion.** One of the five Sustainable Development Goal (SDG)-focused Impact Areas of the CGIAR 2030 Strategy is: Gender Equality, Youth & Social Inclusion (GEYSI)—see Figure 1. Through research and innovation, CGIAR aims to address gaps in GEYSI areas and contribute to collective global targets. Focus areas include: (1) closing the gender gap in rights to economic resources for over 500 million women who work in FLW systems; and (2) offering rewarding opportunities to 267 million young people who are not in employment, education, or training. This guideline considers that GEYSI is oriented towards dimensions external to CGIAR organizational structures (research participants, partners, stakeholders, collaborators, and similar). From an evaluation perspective, GEYSI implies the systematic integration of gender-responsive evaluation questions, sex- and age-disaggregated data, intersectional analysis, assessment of power relations, and identification of unintended negative or differential effects, in line with UN Women and OECD-DAC guidance. Evaluations should assess the extent to which CGIAR research contributes to gender-transformative outcomes, including shifts in agency, norms, and decision-making power—not just participation or access.

**CGIAR and gender, diversity and inclusion.** Gender, Diversity and Inclusion (GDI) within CGIAR is guided by the [2020 GDI Framework](#) and related actions plans (GDI Action Plan [2020–21](#), [2023–24](#)). CGIAR established the GDI Function in January 2020, which was renamed to Culture and Engagement (C&E) in 2025. The most recent [2025–27 C&E Plan](#) included key activities and progress indicators focused on four outcomes (see Figure 2). The five operating principles to advance GDI within CGIAR workplaces are as follows: (1) foster diversity and inclusion; (2) provide fair, safe and inclusive workspaces; (3) raise gender equality, diversity and inclusion awareness and recognizing bias, including unconscious bias, in the workplace; (4) advance accountability on workplace gender equality, diversity and inclusion; and (5) progress partnerships. This guideline considers that GDI is oriented towards dimensions internal to CGIAR organizational structures (staff, consultants, students employed by CGIAR, and similar) encompassing the analysis of internal gender equality—such as team composition, leadership

opportunities, workplace culture, and equity in decision-making and resource allocation—in line with UNEG standards on evaluation team diversity and impartiality.

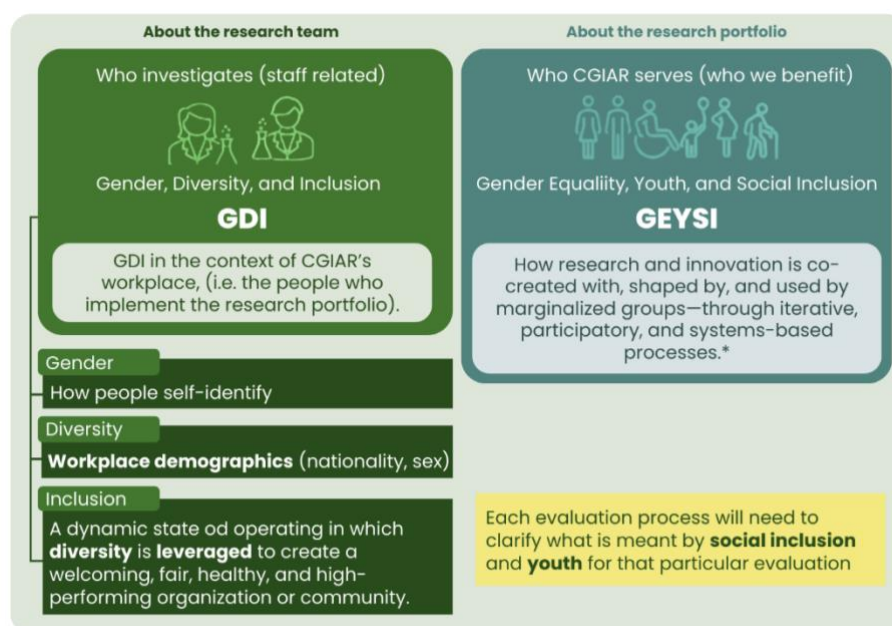
**Figure 2. Outcomes of the 2025–27 C&E Plan**



## 1.2.CGIAR Terminology

CGIAR uses a variety of terms to refer to groups that may be excluded from standard evaluation processes. Clarifying this terminology early ensures that evaluations consistently capture both **internal** (GDI) and **external** (GEYSI) dimensions of equity and inclusion. GDI influences GEYSI: inclusive and diverse teams, with appropriate qualifications and training, are more likely to design and deliver in an inclusive fashion. Research indicates that teams characterized by diversity and inclusion tend to deliver more effective, context-sensitive interventions.<sup>11</sup> In CGIAR context, Figure 3 illustrates this distinction between GDI (**who implements the R4D**) and GEYSI (**who benefits from it**). CGIAR evaluations should explicitly recognize that evaluator diversity, reflexivity, and awareness of bias directly influence evaluation quality, credibility, and fairness.

**Figure 3. CGIAR's engagement with equity**



\*Adapted from ISDC's work on inclusive innovation

<sup>11</sup> McKinsey & Company (2023). [Diversity Matters Even More: The Case for Holistic Impact](#).

### 1.2.1. Note on Terminology and Structure

While the current version of these guidelines reflects the CGIAR organizational landscape as of 2025–30 including Programs and Accelerators—core guidance is grounded in enduring principles and concepts of gender equality, youth inclusion, and diversity for evaluating ‘interventions’, to also include policies. Such framing will support relevance regardless of structural adjustments within CGIAR and for external audiences. No matter how organizational arrangements evolve, evaluations will consistently apply gender-responsive, human-rights-based and participatory evaluation principles, ensuring compliance with United Nations Evaluation Group (UNEG) ethical norms and standards.

### 1.2.2. Note on Terminology—GDI and C&E

In this document, GDI refers to CGIAR’s internal commitment to inclusive, equitable, and enabling workplaces. As of 2025, this workstream is housed under the CGIAR C&E Function. Any references to GDI in these guidelines are intended to include the responsibilities and principles now reflected in the C&E team’s mandate.

## 1.3. GEYSI and GDI in CGIAR Evaluations

Rigorous, independent process and performance evaluations play a critical role in supporting CGIAR’s design and implementation of research and innovations. Evaluations also generate learning that directly inform CGIAR’s innovation and delivery, facilitate continuous improvement, and ensure accountability to funders and other stakeholder groups. CGIAR’s [Evaluation Framework](#) and [Evaluation Policy](#) (2022) articulate how process and performance evaluations support CGIAR to deliver its mission and implement the [2030 Strategy](#).

All CGIAR evaluations are grounded in the Evaluation Framework and Evaluation Policy, which apply to each legal entity and business unit that, taken together, constitute CGIAR as an operating entity. Under the Evaluation Framework, the principle on responsiveness to GDI describes that evaluation design and conduct, commissioning teams and reporting strives to fully address GDI parameters.

Evaluating for GEYSI and GDI is important for three key reasons: (1) to provide **accountability** for public and private investment in research that generates international public goods; (2) to help inform funders and leadership about CGIAR’s **contribution** to GEYSI research and its commitment to GDI/C&E in the workplace (evaluations provide an independent lens to assess performance, identify gaps, and enhance accountability); and (3) to **understand** the extent to which CGIAR is an active part of closing GEYSI gaps and enabling transformative change—including through accelerated progress towards SDGs where gender equality, youth, and social inclusion are explicitly tracked.<sup>12</sup>

Figure 4. Evaluation Framework and Policy



<sup>12</sup> GEYSI-related contributions are particularly relevant to SDG 1 (No Poverty), 2 (Zero Hunger), 3 (Good Health and Well-being), 4 (Quality Education), 5 (Gender Equality), 8 (Decent Work and Economic Growth), 10 (Reduced Inequalities), 13 (Climate Action), and 16 (Peace, Justice and Strong Institutions)—as these contain indicators or targets with explicit gender, age, or social inclusion dimensions. Nevertheless, GEYSI and transformative change principles are foundational to achieving all SDGs and should be considered crosscutting.

 If GEYSI and GDI are not **integrated** into evaluations, CGIAR risks making decisions based on incomplete evidence. By asking the right questions and collecting data on these dimensions, evaluations can show how well CGIAR is **addressing equity** and **inclusion**, achievements, lessons learned, and room for improvement.

Evaluations must apply appropriate methods—including mixed methods, participatory tools, gender-sensitive qualitative approaches, and systematic disaggregation of data by sex, age, disability, and other relevant factors—to ensure credible and inclusive findings.

The [Evaluation Framework](#) states that CGIAR evaluations aim to support CGIAR and its stakeholders to measure and assess the process, results, and consequences of CGIAR’s work, and outlines 15 standards and principles, including:

- **Standard 5:** CGIAR evaluations need to be responsive to GDI.<sup>13</sup> “Evaluation design and conduct, commissioning of teams, and reporting strive to fully address GDI parameters. Evaluations will consider who is **engaged** in the work and who **benefits** from it.”<sup>14</sup>

While the Evaluation Framework states that all CGIAR evaluations need evaluative questions to address GDI, it is referring both to who is engaged in the workplace and who benefits from CGIAR’s interventions. Thus, GDI guidance also delves to some extent into GEYSI. However, these guidelines keep GEYSI and GDI separate.

- **Standard 6:** Speaks to the importance and requirement of focusing on GEYSI and equity. “Evaluations...integrate ethical and equity considerations in the evaluation design and implementation,”<sup>15</sup> consistent with UNEG Ethical Guidelines and UN Women’s Ethical Protocol for Gender-Responsive Evaluation.
- Additional related standards and principles include “Fairness, confidentiality, and no harm” (**Standard 13**), and “Legitimacy and participation.” (**Standard 4**) Evaluations apply CGIAR’s Monitoring, Evaluation, Learning and Impact Assessment (MELIA) principles to assess fairness and participation—see [Quality of Science \(QoS\) Evaluation Guidelines](#).

In practice, addressing both GEYSI and GDI requires dual focus for evaluators.

**Figure 5. CGIAR evaluation principles and standards**

#### PRINCIPLES AND STANDARDS

- Relevance, Use and Utility
- Independence and Lack of Bias
- Transparency
- Legitimacy and Participation
- Credibility, Robustness
- Responsiveness to GDI
- Ethics and Equity
- Measurability
- Efficiency
- Comparative Advantage
- Fairness, Confidentiality, No Harm
- System-framing and Complexity Awareness
- Capacity Building

#### Specific to AR4D Context:

- Use of TOC, Theory-based Approaches
- Consideration of Development Impact
- Attribution, Contribution

## 2. Purpose, Objectives and Audience

<sup>13</sup> CGIAR. (2022). [Evaluation Framework](#), p. 2.

<sup>14</sup> Ibid., p. 4.

<sup>15</sup> Ibid.

## 2.1. Purpose and Objectives

Evaluating GEYSI and GDI requires specific evaluation **approaches, questions**, appropriate **methods** of inquiry and data gathering **techniques**, and dedicated **analysis**. While the Evaluation Framework and Policy frame and guide evaluation, evaluation teams require CGIAR-contextual nuancing.<sup>16</sup> These guidelines build on CGIAR’s own gender-related framing, to focus on how to engage with GEYSI and GDI in process and performance evaluations.<sup>17</sup> The purpose is to provide IAES, CGIAR and evaluation teams with practical advice on how to incorporate a GEYSI and GDI lens to meet **two main objectives**:

- Guide how to approach GEYSI and GDI in all evaluation phases, and
- Highlight the roles and responsibilities for evaluating GEYSI and GDI.

GEYSI and GDI considerations should be integrated across all phases of the evaluation process, irrespective of the evaluation scope and theme, recognizing that some evaluations will assess equity or inclusion as a primary focus.

### **Box 1. Why a combined GEYSI and GDI Evaluation Guideline?**

#### **A strategic rationale for combined GEYSI and GDI Evaluation Guidelines**

At the outset of this guideline’s development, concerns were raised about combining guidance on gender, diversity, and inclusion in research (GEYSI) with gender and inclusion in the workplace (GDI). There is a risk that the credibility of gender in research may be undermined by its association with organizational or HR-related matters, which are sometimes seen as less scientific or external to research excellence.

The Evaluation Function of IAES made a deliberate decision to develop a combined guideline for the following reasons:

- **Coherence with the CGIAR Evaluation Framework and Policy**, which explicitly call for responsiveness to both internal and external dimensions of gender and inclusion.
- **Recognition of the interdependence** between diverse research teams and their ability to conduct gender-responsive and inclusive research.
- **Efficiency and consistency** in evaluation commissioning, design, and implementation—reducing the burden of navigating multiple, disconnected guidance documents.
- **Strategic alignment with CGIAR’s CGIAR structure**, where research excellence and institutional performance are part of an integrated accountability system.

This guideline distinguishes between GEYSI and GDI considerations across the evaluation lifecycle. It also provides tools, checklists, and differentiated guidance to ensure that the evaluation of gender in research retains its methodological rigor and scientific standing, while also ensuring that workforce inclusion is addressed as a critical enabler of research quality and organizational equity.

## 2.2. Audience and Users

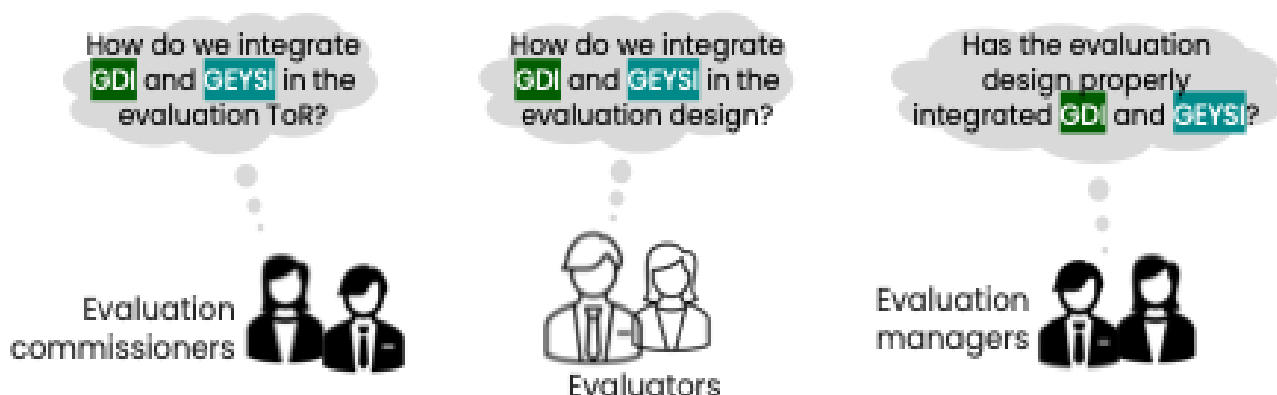
<sup>16</sup> Three CGIAR documents identify the need to focus on GEYSI and GDI in an evaluative process: (1) [sub-study under the SG Evaluations \(2024\)](#); (2) [GENDER Platform Evaluation \(2023\)](#); and (3) Gender, Youth, Inclusion and Diversity Evidence Compendium (2021), available by request from IAES.

<sup>17</sup> Additional related [Evaluation Guidelines](#) and [Method Notes](#) are available.

These guidelines primarily target evaluators, evaluation managers and commissioners involved in CGIAR process and performance evaluations. They are also relevant for those who contribute to CGIAR evaluations—including evaluand, and Monitoring, Evaluation and Learning (MEL) professionals.

The guidelines are designed to support internal reflection and assessment by CGIAR GDI/C&E teams and GEYSI focal points. Their use –whether to design internal reviews, contribute to evaluation Terms of Reference (ToRs), or frame learning processes–would bring practical value. Users in other Research for Development (R4D) contexts may also find this document useful for their evaluations.

**Figure 6. Personas–users of these guidelines**

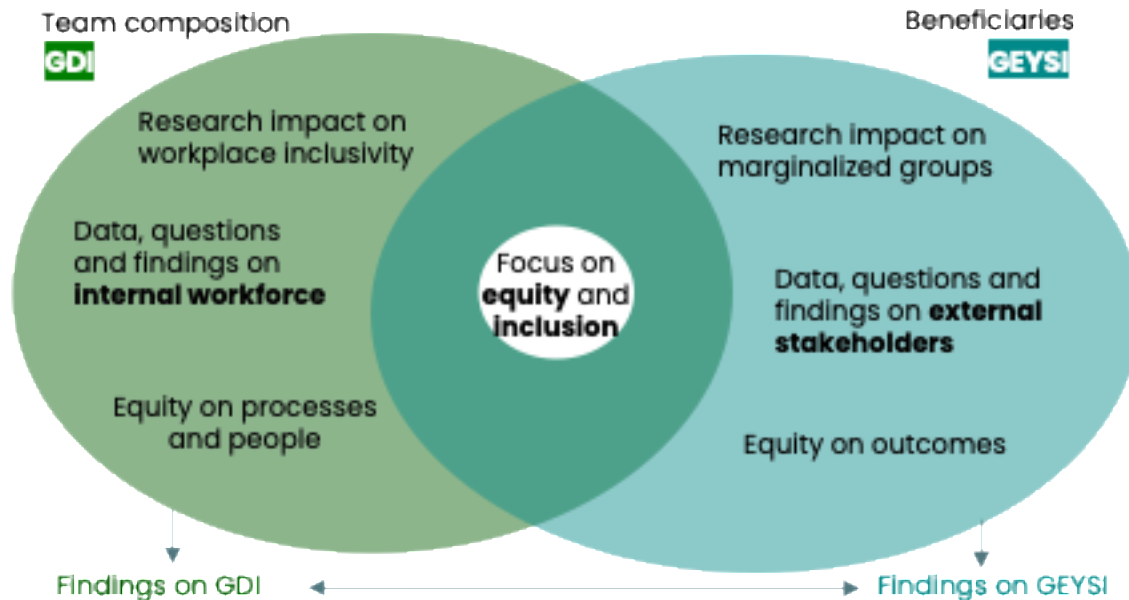


### 3. GEYSI and GDI in the CGIAR Strategy and Structures

This section presents two different yet overlapping dimensions of GEYSI and GDI in CGIAR (see Figure 7):

- **GEYSI** covers the **Portfolio**. Evaluation questions focus on what is being done, how it is being done, and what happened as a result.
- **GDI** covers the **workforce**, including those who implement the research portfolio. CGIAR refers to this as GDI in the workplace.

**Figure 7. GEYSI and GDI in CGIAR (developed by authors)**



### 3.1. CGIAR Research and Innovation Strategy (2030) and GEYSI Portfolio

The [CGIAR Research and Innovation Strategy \(2030\)](#) details **what** and **how** CGIAR will deliver on its overall mandate, with the key considerations:

- CGIAR's five SDG-linked **Impact Areas**, including [SDG5 focused IA](#): Gender equality, youth & social inclusion. This IA has been operationalized through the designated Generating Evidence and Directions for Equitable Results (GENDER) Impact Platform<sup>18</sup>.
- Three **Action Areas**: Genetic Innovation (GI), Resilient Agrifood Systems (RAFS), and Systems Transformation (ST), delivered through science groups in the 2022–24.<sup>19</sup>
- 2025–30 Portfolio of nine **Science Programs** and four **Accelerators**, including the [Gender Equality and Social Inclusion Accelerator](#).
- Seven **ways of working** (WoWs), including a systems–transformation approach, to bring multiple benefits across all Impact Areas, for integrated approaches to gender equality and social inclusion.<sup>20</sup>



<sup>18</sup> CGIAR IAES. (2023). [Evaluation](#) of CGIAR GENDER (Generating Evidence and New Directions for Equitable Results) Platform.

<sup>19</sup> The three [SGs and 33 Initiatives](#) between 2022–24 (see related study).

<sup>20</sup> CGIAR IAES. (2025). [Terms of Reference: Summaries of Learning on CGIAR's Ways of Working](#).

The Gender Policy for CGIAR was being developed at the time of finalizing these guidelines.<sup>21</sup> For the portfolio, without a CGIAR-wide strategy on gender, related strategic documents for GEYSI can be considered.<sup>22</sup> During evaluation design and implementation, the evaluation team should identify any updated version or other emerging gender strategies.

## Box 2. Gender Strategy for Genetic Innovation Science Group (2024–28)

The **GI SG** (2022–24) with the **GENDER Platform** co-developed a **GI Gender Strategy**. The Strategy aims to integrate **gender considerations** across its portfolio of Initiatives. The strategy, informed by a variety of actors and empirical data, seeks to incorporate **gender research** into **market intelligence**, thereby developing gender-informed product profiles, breeding pipelines, and seed systems. These efforts are intended to promote the development and deployment of new crop varieties that cater to the needs of both men and women end-users.

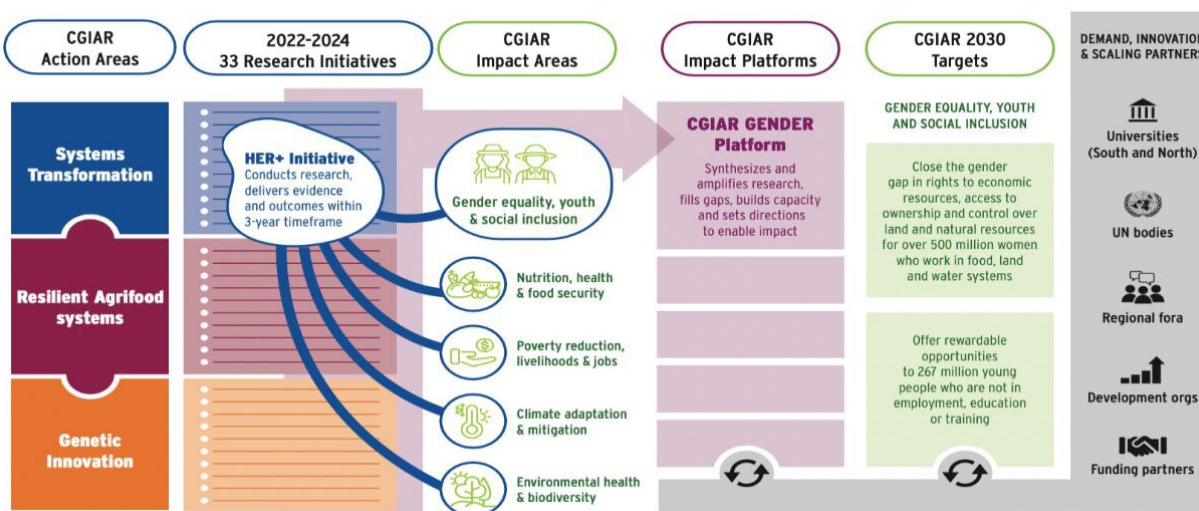
### 3.1.1. Gender Equality and Inclusion Accelerator

The **Gender Equality and Inclusion Accelerator** aims to lead strategic and innovative research to advance GEYSI across CGIAR's 2025–30 Portfolio. This new structure is designed to promote greater integration, collaboration, and efficiency, ensuring that CGIAR's research is interconnected and delivers multiple benefits across the five Impact Areas.

### 3.1.2. GENDER Impact Platform

The **GENDER Impact Platform** has been CGIAR's delivery mechanism for GEYSI across portfolios. Figure 8 illustrates how the GENDER Impact Platform intends to contribute to the 2030 Strategy. The Platform was **independently evaluated** in 2022, with a designated **Evidence Module Study**.

Figure 8. GENDER Impact Platform contribution to the 2030 Strategy



<sup>21</sup> See [this link](#) for an updated list of policies.

<sup>22</sup> As of November 2025, there is no approved CGIAR-wide gender strategy. Related strategic documents for GEYSI can be considered: (1) Thematic **Gender Strategy** by Genetic Innovation SG (see Box 2); (2) GESI strategy under the **RAFS Initiative** (2024); (3) Gender Equality, Climate Change and Agriculture in the Middle East and North Africa (MENA) region: Priorities (2022) for the **Initiative on Fragility to Resilience in Central and West Asia and North Africa**, with the RAFS SG and ST SG; and (4) **Gender and Inclusion Strategy 2020–23** of the **International Water Management Institute** (IWMI), a CGIAR center.

Aligned to the 2030 Strategy, **work under GENDER Platform** advised CGIAR senior leadership on GESI in research through incentives for gender responsive research, building gender research teams and adopting fit-for-purpose monitoring and reporting guidelines, strategies and accountability frameworks. GENDER Impact Platform's **Annual Science Exchange**, or **Gender Conference**, builds capacity of the social capital of gender in FLW systems researchers.<sup>23</sup>

Under the [three SGs](#),<sup>24</sup> CGIAR required explanation of how gender should be integrated into the design and implementation of the 33 Initiatives. At the proposal stage, each Initiative scored itself on gender, which the [GENDER Impact Platform](#) reviewed to assign a score: gender blind (0), gender accommodative/aware (1A), gender responsive (1B) or gender principle (2). Each score had associated requirements.<sup>25</sup> Of the 33 Initiatives, the [Gender Equality Initiative](#) was the only gender principle Initiative, while 14 are gender responsive, 13 are gender accommodative/aware, and three are gender blind.<sup>26</sup>

With this integrated monitoring and evaluation architecture in place, the following sections describe how GDI and GEYSI functions are embedded within CGIAR's organizational structures and culture.

### 3.2. GDI/C&E-Research Teams and Workforce

Since its creation in 2020, the [GDI Function](#)—renamed C&E in 2025—operated under the [GDI in the Workplace Framework](#) and successive [Action Plan](#) (2020–21, 2023–24, 2025–27).

The C&E Function **tracks data** on CGIAR leadership, management teams, and research workforce composition. The 2020–21 Action Plan introduced the [GDI Matrix](#), establishing a transparent baseline of 15 best-practice indicators. Building on this foundation, the [2025–27 C&E Action Plan](#) broadened the mandate from raising awareness to driving cultural transformation. Its four strategic priorities aim to embed diversity and inclusion as measurable, system-wide outcomes: (1) Inclusive Leadership; (2) Workplace Culture; (3) Representation; and (4) Accountability. Figure 8 highlights the GDI/C&E core focus areas and objectives.

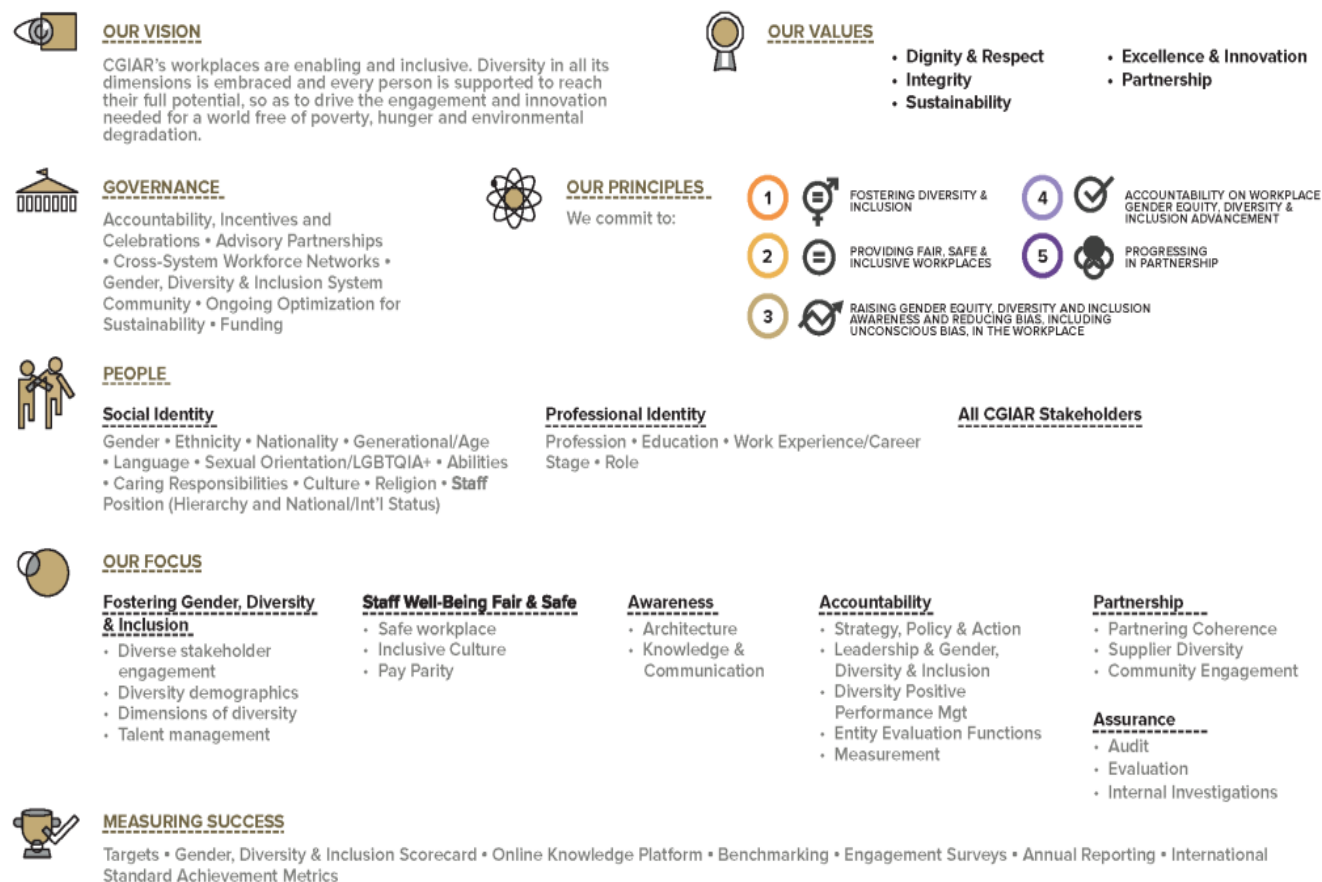
<sup>23</sup> CGIAR (2024). [Gender Equality and Social Inclusion Accelerator: Full Design Document](#).

<sup>24</sup> As of April 2024.

<sup>25</sup> Gender blind (0): (1) a gender analysis was conducted; (2) its findings are used to ensure at minimum that the Initiative activities/intervention do no harm and does not reinforce gender inequalities; and (3) gender disaggregated data is collected. Gender accommodative/aware (1A): (1) gender equality is an objective, but not the main one; (2) the Initiative/project includes at least two explicit gender-specific outputs and (adequate) funding and resources are available; and (3) data and indicators are disaggregated by gender and analyzed to explain potential gender variations and inequalities. Gender responsive (1B): (1) at least one explicit gender equality outcome; (2) the Initiative /project team has resident gender expertise or capacity; and (3) the Initiative/project includes indicators and monitors participation of and differential benefits to diverse men and women. Gender principle (2): (1) gender equality is the main objective of the Initiative/project and is fundamental in its design and expected results.

<sup>26</sup> CGIAR IAES. (2025). [Gender and Social Inclusion: Sub-study of Evaluation Science Group](#).

**Figure 9. Key objectives for GDI/C&E in CGIAR's workplaces**



Source: *Framework for Gender, Diversity and Inclusion in CGIAR's Workplaces* (2020).

A shift from a standalone GDI to a broader C&E approach re-positioned GDI principles as foundational for a **holistic organizational culture**. With continued relevance of the GDI operational principles, their integration within C&E would help ensure that diversity and inclusion are not seen as separate efforts, but as core elements of a cohesive and productive work environment: daily behaviors, leadership practices, and overall employee experience across the entire organization.<sup>27</sup>

<sup>27</sup> 22nd CGIAR System Council Meeting (SC22). (2025). GDI now re-framed to C&E. Consider independent review of GDI/C&E ongoing at the time of launching these guidelines (TORS),

### 3.3. Monitoring and Evaluation: Performance and Results Management Framework, Evaluation Framework, Evaluation Policy & Dashboards

CGIAR's monitoring and evaluation (M&E) architecture combines performance management systems with evaluation standards to ensure that GDI and GEYSI are consistently addressed.

The CGIAR 2022–30 [Performance and Results Management Framework \(PRMF\)](#) underpins monitoring and learning across the CGIAR Portfolio. It applies **gender tagging** to proposals and introduces **scoring** to assess the quality of gender integration into Initiatives. Together, these mechanisms provide **transparency** and **accountability** on how GEYSI considerations are embedded into research design and delivery.

**Evaluation Framework** and **Policy standards** for all evaluations, emphasize ethics, fairness, and participation, and require that evaluations assess who conducts the work, who participates in it, and who ultimately benefits from it. It is the evaluators' responsibility to examine equity across processes, participation, and outcomes.

Operationalization of these evaluation standards aligns to the PRMF and related monitoring tools. A standardized monitoring and reporting requirement related to these topics is not the subject of this guideline; such standard would, however, facilitate gender-responsive and inclusive process and performance evaluation, through the supply of consistent monitoring data. Evaluators should therefore treat PRMF data and gender tagging/scoring as complementary evidence sources when GEYSI and GDI/C&E in CGIAR programming and workplace practices.

#### Box 3. PRMF and evaluation standards

The PRMF provides the basis for CGIAR accountability, learning, communication, and resource mobilization. It underlines the importance of recognizing **concepts of gender, diversity and inclusion broadly** and states that data should be **disaggregated** by gender for outputs and outcomes that are related to capacity development, **empowerment** and **inclusion** in the agricultural sector, smallholder farmers' benefit in agriculture, and economic benefits felt by smallholder farmers due to research conducted by CGIAR. The PRMF is the basis for [Technical Reporting Arrangement \(TRA\)](#). The TRA establishes the **monitoring parameters** and includes guidance on content, timing, format, standards, and scope and includes the CGIAR Results Framework.

CGIAR employs several dedicated dashboards and monitoring mechanisms to track progress on gender equality and diversity Initiatives, such as:

- **[CGIAR Result Dashboard](#)**—includes a gender equality tag of 'not targeted', 'significant' or 'principle' for all outputs and outcomes.
- **[Workforce Data Dashboard](#)**—provides information on sex, nationality, and other relevant workforce demographics, and includes the GDI Matrix, which tabulates 15 CGIAR GDI indicators.

Semi-annually, materials from a standing agenda in CGIAR's System Council dedicated to GDI/C&E and Gender in Research would provide additional evidence (see example from [SC22](#)). [Annual Reports](#) may also report on GEYSI and GDI, without a standard requirement for it.

The next section translates strategic and structural commitments into practical guidance for evaluators, outlining how to integrate GEYSI and GDI considerations step-by-step.

## 4. Integrating Concepts of Gender, Diversity and Inclusion into CGIAR Evaluations

This section offers **step-by-step** guidance for systematically integrating concepts of gender, diversity and inclusion broadly (**GDI** and **GEYSI** considerations) across **all phases** of CGIAR evaluations—from preparation and scoping to data analysis, reporting, and follow-up—in alignment with the Evaluation Policy and the new 2025–30 Portfolio structure. It **distinguishes** between **GDI** and **GEYSI**, while also recognizing their **interdependence** in shaping inclusive and impactful research. This guidance aims to ensure that all evaluations uphold CGIAR's commitments to equity, inclusivity, and transformative change. By clarifying both the **overlap** and the **distinctions** between GEYSI and GDI, this section supports evaluators in embedding both sets of considerations appropriately, ensuring that all evaluations contribute meaningfully to CGIAR's inclusive transformation goals.

Note: Many of the insights, techniques, and tools apply to both GEYSI and GDI, reflecting shared principles of equity, inclusion, and responsiveness. This section first presents these common foundations for inclusive evaluation design and conduct. Where **specific adaptations** or measures are needed for either GEYSI or GDI, they are clearly marked in two parallel, color-coded text boxes.

**Table 1. Summary of GDI and GEYSI specific considerations**

|                      | <b>GDI-specific considerations</b><br>( <i>internal focus: CGIAR workforce and institutional practices</i> )                                      | <b>GEYSI-specific considerations</b><br>( <i>external focus: beneficiaries and Research Portfolio</i> )                                                                                           |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Emphasis</b>      | Emphasis on the <b>composition</b> , inclusivity, and working environment of teams and institutions.                                              | Emphasis on how research initiatives <b>address</b> the needs, priorities, and agency of diverse external groups, including women, youth, indigenous peoples, and other marginalized populations. |
| <b>Questions</b>     | Evaluation should assess policies, practices, and workplace <b>cultures</b> that affect representation, safety, and advancement of diverse staff. | Evaluation questions should explore equity in <b>access</b> to benefits, participation in research processes, and outcomes across social groups.                                                  |
| <b>Data</b>          | Data sources may include HR <b>records</b> , staff surveys, and interviews/focus groups across roles and levels.                                  | Data should be <b>disaggregated</b> by gender, age, socioeconomic status, and other relevant dimensions.                                                                                          |
| <b>Specificities</b> | Specific attention to institutional <b>accountability</b> mechanisms and progress on internal diversity and inclusion goals.                      | Engage <b>stakeholders</b> from affected communities in evaluation design and validation.                                                                                                         |

**Box 4. Quick roadmap for evaluators: integrating GEYSI and GDI in five steps**

Evaluators can use this quick guide as a **roadmap** to ensure that GEYSI and GDI are systematically integrated throughout the evaluation process:

1. Define relevance in the **ToR**. Explicitly include GEYSI and GDI dimensions in the ToR and clarify expectations for their assessment.
2. Identify key **questions** and **data disaggregation** needs. Frame evaluation questions that capture equity and inclusion, and plan to collect data disaggregated by sex, age, and other relevant social markers.
3. **Engage** stakeholders meaningfully during scoping. Ensure participation of diverse voices, particularly from marginalized groups, when refining evaluation scope and methods.
4. **Collect** and **analyze** data with equity lenses. Use inclusive tools and methods and interpret findings with attention to intersecting identities and power dynamics.
5. Use **findings** to shape actionable **recommendations**. Ensure conclusions highlight not only what worked or did not work, but also how equity and inclusion can be strengthened in future research and workplace practices.

**4.1. Pitfalls to Avoid**

When integrating GEYSI and GDI into evaluations, certain recurring mistakes can undermine quality and usefulness of findings. Evaluators should be mindful to avoid the following:

**Figure 10. Common mistakes and suggested actions**

| Common mistakes                                                                             | Suggested actions                                                                                                            |
|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| ✗ Equate GEYSI only with women.                                                             | ✓ Broaden the lens to also include men, youth, Indigenous peoples, persons with disabilities, and other marginalized groups. |
| ✗ Add GEYSI/GDI questions as an afterthought.                                               | ✓ Integrate equity considerations from the very start—at scoping, design, and data planning stages.                          |
| ✗ Focus only on outcomes.                                                                   | ✓ Assess both processes and outcomes, recognizing that inclusive processes often drive sustainable results.                  |
| ✗ Assume one-size-fits-all solutions.                                                       | ✓ Adapt questions and methods to the local context, recognizing intersecting identities and power dynamics.                  |
| ✗ Collect disaggregated data without analyzing underlying relational or structural factors. | ✓ Apply intersectional and gender-transformative analytical frameworks.                                                      |
| ✗ Validate findings only internally.                                                        | ✓ Incorporate feedback loops with affected stakeholder groups to strengthen legitimacy and accuracy.                         |

## 4.2. Use of Artificial Intelligence in Evaluations

Before turning to the step-by-step guidance, it is important to note that new technologies such as artificial intelligence (AI) are increasingly used in evaluation practice. While these tools can expand analytical capacity, they also carry risks of reinforcing gender stereotypes and overlooking structural barriers. Box 5 highlights key ethical considerations for applying AI in gender-responsive evaluations.

### Box 5. AI use and gender ethics in evaluation

As AI tools become increasingly integrated into evaluation practice, CGIAR's [Technical Note on AI in Evaluation](#) highlights critical risks for gender-responsive evaluations. [Research carried out on generative AI and women empowerment](#) found that AI systems analyzing questions from women farmers often reinforced gender stereotypes, overlooked structural barriers women face, and provided unrealistic guidance that failed to address real-world constraints.

AI bias emerges mainly from three primary sources: **data bias** (training datasets that underrepresent women or reflect existing gender inequalities), **algorithmic bias** (mathematical formulations that inadvertently prioritize certain outcomes), and **user bias** (human interactions that reinforce existing prejudices). Since AI models learn from existing texts and default to statistically prevalent patterns, they can systematically reinforce stereotypes and overlook marginalized voices—particularly problematic where gender context and representation matter.

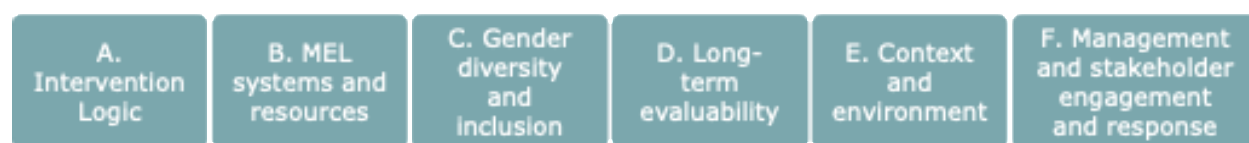
As programs increasingly integrate AI into operations, these biases can directly affect gender outcomes and program delivery, making vigilant oversight essential for maintaining evaluation integrity.

## 5. Preparation and Scoping

### 5.1. Evaluability Assessment

CGIAR uses an [Evaluability Assessment \(EA\)](#) at different phases towards the evaluability principle of the Evaluation Framework. The [Framework](#) includes a dedicated Domain C on GDI (covering GEYSI in a context) to assess how an intervention incorporate equitable participation of women and men, youth, and marginalized groups in the theory of change (ToC).

**Figure 11. Evaluability Framework Domain**



Source: [CGIAR Evaluation Guidelines: Conducting and Using EAs \(2022\)](#)

The EA covers if and how **diversity** and **inclusion** were defined, with the related expectations, related to the specific evaluand.<sup>28</sup> Table 2 shows how to translate considerations for each dimension:

<sup>28</sup> [CGIAR IAES. \(2023\). GIAR GENDER Platform Evaluation, 2020–22 Inception Report](#), p. 15.

**Table 2. GDI and GEYSI specific considerations for EAs**

|                                                                                   | GDI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | GEYSI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Specific considerations in assessing evaluability</b>                          | <p>What <b>quantifiable data</b> are available from the GDI/C&amp;E Function, which can be accessed in two ways:</p> <ul style="list-style-type: none"> <li>the publicly available CGIAR <b>Workforce Dashboard</b>, and</li> <li>formal request to the CGDI/C&amp;E Function for data or clarification.</li> </ul> <p>The EA would determine whether the evaluand is <b>diverse</b> and <b>equitable</b>, for the evaluation design to:</p> <ul style="list-style-type: none"> <li>identify <b>gaps</b> to address in the evaluation</li> <li>include follow-up <b>questions</b> based on available data, and</li> <li>collect and analyze relevant evidence.</li> </ul> <p>For example, if data show fewer women staff compared to men, or limited representation of local and/or young researchers, the evaluation can explore <b>underlying causes</b> and provide context-aware <b>recommendations</b>.</p> | <p>Two thematic areas guide how to integrate GEYSI into the EA:</p> <ul style="list-style-type: none"> <li>The EA explores whether and to what extent a research portfolio greatly express GEYSI, e.g., it identifies whether GEYSI is mentioned in the portfolio's objectives, ToC, theory of action, and/or program design.</li> <li>The EA identifies existing <b>data</b> or information on gender, youth, and social inclusion, e.g., it checks whether there is an adequate set of <b>indicators</b> to support assessment of GEYSI during the evaluation.</li> </ul> <p>The UNEG (2024) Evaluation Guidelines<sup>29</sup> characterize <b>evaluability</b> for GEYSI as high, medium, or low, based on the presence of features such as sex-disaggregated data, gender analysis, or inclusion in intervention design. This classification helps evaluators determine the extent to which GEYSI considerations can be meaningfully assessed. A high level of evaluability implies that these dimensions are systematically integrated, enabling robust analysis of differential impacts and progress toward equity goals.</p> |
| <b>Evaluability questions: What data should be accessible for the evaluation?</b> | <p><b>GDI/C&amp;E in the workplace:</b></p> <ul style="list-style-type: none"> <li>The EA aims to identify what <b>disaggregated data</b> are available for which groups that are relevant to the evaluation, e.g., sex, gender, country of origin, country residing in, or age.</li> <li>Based on the CGIAR GDI Action Plan 2023–24, data may exist that addresses how <b>inclusion</b> and <b>diversity</b> are defined and addressed in relation to the entity being evaluated.</li> <li>Determine what <b>workplace diversity targets</b> exist beyond gender for the entity being evaluated.</li> </ul>                                                                                                                                                                                                                                                                                                     | <p><b>GEYSI in the program context:</b></p> <ul style="list-style-type: none"> <li>Determine how gender, youth and/or social inclusion are engaged with.</li> <li>Assess how <b>results statements</b> and/or the results framework address GEYSI considerations.</li> <li>Evaluate if intended <b>beneficiary groups</b> were defined.</li> <li>Determine if the <b>ToC</b> or <b>logic models</b> reflect GEYSI, with outcomes and outputs.</li> <li>Assess the existence of GEYSI-relevant indicators and data and the data quality.</li> <li>Assess the availability of <b>disaggregated data</b>.</li> <li>Determine if other data be disaggregated by other identity <b>factors</b> such as age, race, or ethnicity.</li> <li>Determine potential <b>biases</b> in the way current indicators are framed.</li> </ul>                                                                                                                                                                                                                                                                                                           |

<sup>29</sup> [UNEG. \(2024\). Integrating Human Rights and Gender Equality in Evaluations.](#)

|  | GDI | GEYSI                                                                                                                                                 |
|--|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |     | <ul style="list-style-type: none"><li>Assess whether <b>indicators</b> are gender responsive or provide data on youth and social inclusion.</li></ul> |

With the above considerations, the EA identifies **evaluation readiness** to be assessed on all domains, including GDI and for GEYSI.<sup>30 31</sup> Identifying **gaps** in the composition of teams and in the intervention design, and/or gaps in data, then informs the evaluation ToR development and identifies the kinds of expertise required to implement the evaluation.<sup>32</sup> Data is also provided to the evaluation team.

**Box 6. Resources on gender, youth, and social inclusion in EAs**

CGIAR provides guidance on conducting EAs, and the Food and Agriculture Association ([FAO Guidelines for the Assessment of Gender Mainstreaming](#) (p. 5), [UNEG Integrating Human Rights and Gender Equality in Evaluation](#) (p. 16), and [UN Women’s guidelines](#) (p. 121) provide specific guidance on how to conduct an EA of gender.

5.2. Stakeholder Analysis and Engagement

Guidance provided for stakeholder engagement is applicable to both GDI and GEYSI, reflecting the shared principles and practices in analyzing stakeholders across evaluations with either focus. **Two steps** are required and are interwoven into the evaluation’s stakeholder and engagement approach:

**Box 7. Real case—stakeholder engagement in scoping**

In the RAFS Science group Evaluation (2024), evaluators engaged women, youth, and Indigenous community representatives separately during the scoping phase. This revealed distinct **priorities**—such as women farmers’ access to seed systems and youth interest in climate-resilient practices—that would have been missed in a single mixed consultation.

Figure 12. Two steps for the stakeholder analysis and engagement approach

|  Step 1: Identify types of stakeholders for inclusion in the evaluation process                                                                                                                                                                                                                                                                                                                                                 |  Step 2: Ensure authentic engagement                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Identify who needs to be engaged (often groups that are overlooked, and yet whose interests and/or influence are key to equitable, inclusive, and sustained outcomes). Crucial to the identification of stakeholders is recognizing both the contributors to and the end-users in inclusive innovations and in the research from design to implementation.</p> <ul style="list-style-type: none"><li>Based on that understanding, a GEYSI-sensitive approach asks, “who is and who is not included?”.</li></ul> | <p>Some stakeholder groups may have limited engagement pathways in R4D processes (e.g., due to literacy levels, language skills, and time and logistical constraints, digital access), and particular effort must be made to enable their participation.<sup>33 34</sup> The analysis recognizes who needs to be engaged and their potential barriers to engagement, which then supports the evaluation team to identify solutions for their inclusion in the evaluation process.</p> |

<sup>30</sup> [UN Women Independent Evaluation Office. \(2015\). How to manage gender-responsive evaluation: Evaluation handbook.](#)

<sup>31</sup> International Organization for Migration (IOM). (2018). [Guidance for Addressing Gender in Evaluations.](#)

<sup>32</sup> Ibid.

<sup>33</sup> Ibid.

<sup>34</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis.](#)

- From a GDI point of view, internal stakeholders may include the program/thematic area and implementers, leaders, staff and HR within CGIAR.

**Table 3. GEYSI stakeholder engagement and analysis questions**

| Stage of engagement or analysis                                | Questions <sup>35</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Identify (internal and external) stakeholders</b>        | <ul style="list-style-type: none"> <li>• What are stakeholder's gender and age compositions? What other groups are represented, and which relevant groups are missing?</li> <li>• Are organizations for women, local, Indigenous People, youth or other relevant organizations listed?</li> <li>• Are women, men, youth, or Indigenous Peoples leaders included, as relevant?</li> </ul>                                                                  |
| <b>2. Identify interests and influence of each stakeholder</b> | <ul style="list-style-type: none"> <li>• Do the stakeholders listed represent the interests of diverse women and girls? Men and boys? Indigenous People? Other under-represented groups or marginalized populations? If not, who speaks on each groups' behalf and from where do they derive their legitimacy to do so?</li> <li>• Which stakeholders can have significant influence (positive or negative) on the program? Are they included?</li> </ul> |
| <b>3. Identify the relationships between the stakeholders</b>  | <ul style="list-style-type: none"> <li>• What are the power dynamics between the different stakeholders? Who dominates? How?</li> <li>• Could the program lead to conflict among stakeholders (e.g., men and women)? Which stakeholders? How?</li> <li>• What can be done to prevent or mitigate conflict among stakeholders during the evaluation process?</li> </ul>                                                                                    |
| <b>4. Identify potential barriers to participation</b>         | <ul style="list-style-type: none"> <li>• What factors would prevent any identified stakeholder groups or individuals from participating?</li> <li>• How can barriers be addressed in the evaluation process?</li> </ul>                                                                                                                                                                                                                                   |

**Box 8. Resources on stakeholder analysis**

The [World Food Programme \(WFP\)](#) provides useful guidance on gender-sensitive stakeholder analysis. The [South African M&E Association \(SAMEA\)](#) lists diversity and inclusion considerations for identifying relevant stakeholder groups. UN Women's Independent Evaluation Office also provides comprehensive [guidelines](#) (p. 40) with a template (p. 139). UNEG provides useful [guidance](#) to determine the degree of stakeholder participation (p. 21) as well as a stakeholder evaluation matrix (p. 23).

<sup>35</sup> These questions are adapted from [WFP](#) guidance, produced by the WFP Gender Office: Gender & Stakeholder Analysis (Internal document).

## 5.3. Evaluation Criteria and Questions

The seven evaluation criteria in the [Evaluation Policy](#) incorporate GEYSI considerations, with the specific aspects in each criterion selected for a given evaluation. Table 4 specifies further.

- **Relevance.** Understanding how intersecting forms of discrimination may affect the needs and priorities of stakeholders and the extent to which the intervention addresses these. It also involves assessing the underlying contextual factors and power dynamics that may explain diverging priorities, and how the intervention managed and influenced these dynamics (if at all).<sup>36</sup> Evaluation would assess how inclusive the intervention has been for different beneficiary groups and how key principles such as equity, non-discrimination and accountability were incorporated from design to results.<sup>37</sup>
- **Quality of Science.** Built on the principles of credibility and legitimacy,<sup>38</sup> applying a GEYSI lens strengthens both, by ensuring research is relevant, inclusive, and contextually sensitive. Evaluations should consider the use of gender-responsive research methods, the accessibility of outputs to diverse populations, and the contributions of women and marginalized groups—particularly in capacity building and the development of early-career researchers and partners.
- **Coherence.** Insights into the value and coherence of activities that aim to reduce exclusion, reach marginalized and under-represented groups, and transform gender inequalities.<sup>39</sup>
- **Effectiveness** examine achievement of objectives from GEYSI perspective of inclusiveness, or the extent to which the intervention succeeded in involving and improving the situation of different stakeholders, including women, youth and people from marginalized groups.<sup>40</sup> It includes assessing the process through which objectives were achieved, e.g., whether the process was equitable and fair, and the extent to which inequalities and gaps among different groups of stakeholders were reduced.<sup>41</sup>
- **Efficiency** assessments consider both the economic and operational dimensions of an intervention, including the implementation process.<sup>42</sup> Questions focus on the quality of implementation and management processes, especially whether and how resources were allocated to achieve inclusive, equitable and gender-transformative results.<sup>43</sup>
- **Sustainability** assesses whether and how the intervention contributed to building Institutional enablers for gender-equitable innovation scaling and the inclusion of marginalized groups.<sup>44</sup>
- **Impact:** assesses whether drivers of discrimination were addressed and can also explore the contribution of research and research processes to systemic differential results in the lives of women, youth and other marginalized groups.<sup>45</sup>

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<sup>36</sup> Organization for Economic Cooperation and Development (OECD). (2023). [Applying a Human Rights and Gender Equality Lens to the OECD Evaluation Criteria](#). Best Practices in Development Cooperation.

<sup>37</sup> [International Fund for Agricultural Development \(IFAD\). \(2022\). IFAD Evaluation Manual: Part I.](#)

<sup>38</sup> CGIAR IAES. (n.d.). [CGIAR Evaluation Guidance on Evaluating QoS](#).

<sup>39</sup> OECD. (2021). [Applying Evaluation Criteria Thoughtfully](#).

<sup>40</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis](#).

<sup>41</sup> Ibid.

<sup>42</sup> Ibid.

<sup>43</sup> Ibid.

<sup>44</sup> Ibid.

<sup>45</sup> Ibid.

**Table 4. GEYSI focus for each evaluation criterion**

|                                                                                   | Criterion                 | GEYSI Lens / Focus                    | Example Keywords                                            |
|-----------------------------------------------------------------------------------|---------------------------|---------------------------------------|-------------------------------------------------------------|
|  | <b>Relevance</b>          | Intersectionality, power dynamics     | Inclusion, equity, non-discrimination                       |
|  | <b>Quality of Science</b> | Credibility, inclusiveness            | Gender-responsive methods, accessibility, capacity building |
|  | <b>Coherence</b>          | Reach & transformation                | Marginalized groups, gender equality                        |
|  | <b>Effectiveness</b>      | Achievement & inclusiveness           | Fair process, gap reduction, participation                  |
|  | <b>Efficiency</b>         | Resource allocation & process quality | Inclusive, equitable, gender-transformative                 |
|  | <b>Sustainability</b>     | Institutional enablers                | Gender-equitable innovation scaling, inclusion              |
|  | <b>Impact</b>             | Systemic change                       | Drivers of discrimination addressed long-term outcomes      |

Source: IAES Evaluation Function

In relation to **CGIAR's evaluation criteria**, the **Gender Integration Continuum (GIC)** provides a conceptual and operational framework for assessing how deeply gender considerations are embedded within agricultural research for development (AR4D) interventions and their evaluation processes (see also Annex 2). Integrating the GIC into evaluation criteria provides a structured way to understand both the intent and quality of gender integration. It can also aid in interpreting gender scores assigned to Initiatives through CGIAR's internal tagging and monitoring systems.

**Table 5. Gender Continuum Framework**

| Level       | Gender blind                                                                | Gender aware / accommodative                                                                              | Gender responsive                                                                                                       | Gender transformative                                                                         |
|-------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Description | Ignores gender norms, roles, and relations. Risks reinforcing inequalities. | Recognizes gender differences but works around them. May accommodate but does not challenge inequalities. | Intentionally integrates gender analysis to inform design, implementation, and monitoring. Promotes equitable outcomes. | Actively seeks to shift harmful gender norms and power dynamics, fostering structural change. |

Four key components from [IFAD \(2022\)](#) support integrating GEYSI in evaluation to assess:

- if programs have undertaken an analysis of the inequalities between different groups;
- the underlying drivers of such inequalities;
- whether program designs address such inequalities; and
- whether the results frameworks of interventions have indicators to measure progress.

To **operationalize evaluation criteria**, Box 9 and Annex 3 suggest GEYSI-related resources on evaluation questions.

### Box 9. Resources on gender-sensitive evaluation questions

FAO's [Guidelines for the assessment of gender mainstreaming](#) provide examples of specific questions to evaluate specific gender equality objectives (e.g., decision-making, control over resources, access to resources, work burden, budget allocation). The [European Institute for Gender Equality \(EIGE\) Guide to Gender Impact Assessment](#) provides examples of specific questions and areas of evaluation for government policies, laws and programs. The [IOM's Guidance for Addressing Gender in Evaluations](#) has specific questions to assess gender within evaluation reports. The OECD's [Applying Evaluation Criteria Thoughtfully](#) provides additional guidance on six of the seven evaluation criteria (excludes QoS). [UNEG Integrating Human Rights and Gender Equality in Evaluations](#) offers checklists and sample questions for ensuring gender equality and human rights are included in evaluation design, data collection, and analysis. Finally, the [UN Women Handbook for Gender-Responsive Evaluation](#) includes sample gender-sensitive evaluation questions.

Specific to GDI, an example of the CGIAR GDI Action Plan includes **outcomes** (see Table 5) with context-specific questions—illustrative examples are provided below (see additional detail in the [ToRs of the GDI/C&E review in CGIAR](#)).<sup>46</sup> The framing for GDI-related inquiry is advisable around **accountability**.

**Table 6. Mapping of GDI outcomes to illustrative questions (GDI Action Plan 2023–24)**

| Outcome                                         | Illustrative questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Career Pathways and Inclusive Leadership</b> | <ul style="list-style-type: none"> <li>Are opportunities for recruitment, training, and advancement equitable across gender and other social groups?</li> <li>How committed are leaders to inclusive leadership? How is this demonstrated?</li> <li>Does the organization's leadership adequately reflect the available employment pool in the CGIAR?</li> <li>How inclusive is the leadership? In what way? What has been put in place to ensure inclusive leadership?</li> <li>How well-equipped are leaders to practice and model inclusive leadership behaviors?</li> <li>How are GDI data used to inform workforce planning and decision-making, if at all?</li> <li>To what extent, and how, is leadership supportive of a GEYSI research agenda? *</li> </ul> |
| <b>Inclusive Workplace Culture</b>              | <ul style="list-style-type: none"> <li>How effective are CGIAR's policies and practices in promoting inclusion and addressing bias, discrimination, or harassment?</li> <li>Do team members perceive that they are supported to have an equal chance to succeed? How does that look in practice?</li> <li>Do team members feel supported to pursue a GEYSI research agenda?</li> <li>What are staff experiences with regards to: <ul style="list-style-type: none"> <li>a) the work-life balance, parental leave, and other inclusion-related policies?</li> <li>b) a safe and respectful workplace being provided?</li> </ul> </li> <li>How has leadership and management ensured a shared approach to safe and respectful workplaces?</li> </ul>                   |

<sup>46</sup> Check [CGIAR publications page](#) for final GDI/C&E Evaluative Review Report with Internal Audit at CGIAR.

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Diverse Representation</b> | <ul style="list-style-type: none"> <li>To what extent does the entity's staff reflect a broad range of diversity represented at different levels (e.g., age, birth origin, current location, gender, sex, degree, disabilities, race, and ethnicity)?</li> <li>How has the entity mitigated inequity and potential bias in recruitment/promotion processes?</li> <li>Are women and other diverse groups (as defined in CGIAR) advancing at the same rates as white men? Which groups are advancing, and which are not?</li> <li>Do hires reflect the available skilled talent in the market across all roles?</li> <li>Do pay practices support pay equity?</li> <li>Do all employees feel like they are treated fairly? *</li> <li>How is the organization committed to advancing diversity and inclusion? *</li> </ul> |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

\* Indicates slight modification.

## 5.4. Evaluation Approaches

Evaluation should be guided by a distinct evaluation approach or their mix.<sup>47</sup> A **Gender responsive and inclusive approach** is recommended for evaluations, described in this section. Annex 2 provides a menu of other approaches to consider for use in a CGIAR evaluation.

**Table 7. GDI vs GEYSI specific considerations**

| <b>GDI-specific considerations</b> (internal focus: CGIAR workforce and institutional practices)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>GEYSI-specific considerations</b> (external focus: beneficiaries and Research Portfolio)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>GDI focused evaluations may be embedded as art of organizational assessments. While GDI-focused evaluations typically do not examine individual hiring decisions, they can assess organizational GDI culture and its influence on outcomes (see <a href="#">ToRs for GDI/C&amp;E review</a>) and would be framed by GDI-related policy/framework, for relevant insights.</p> <p>Certain GDI questions, for instance on women advancing at the same rate as men, will lead to probing questions on gender equity, gender norms, work-balance, family matters such as care-giving and other extraneous factors that impact an individual but are not necessarily consequences of conditions at the workplace.</p> <p>If GDI is a primary evaluation focus, a deep dive into gender roles, both in the work and reproductive and home space may be warranted. To achieve such a comprehensive evaluation requires a feminist approach (see Annex 2).</p> | <p>A gender responsive evaluation approach identifies and addresses the different needs of girls, boys, women and men to promote equal outcomes.<sup>48</sup></p> <p>Gender is considered in the evaluation's rationale, design, and methodology and is rigorously analyzed.<sup>49</sup> It assesses the degree to which gender and power relationships change because of an intervention using an evaluation process that is inclusive, participatory and respectful of all stakeholders.<sup>50</sup></p> <p>Gender responsive (evaluations taking gender issues into account) and gender transformative evaluations (those challenging and addressing core root causes of inequities) cover extent to which an intervention has resulted in progress towards intended and/or unintended results regarding gender equality and women's empowerment.<sup>51</sup></p> |

<sup>47</sup> CGIAR IAES. (2023). [Behind the Scenes of a Feminist Principles Evaluation: CGIAR's GENDER Platform](#).

<sup>48</sup> UNICEF. (n.d.). [Guidance on Gender Integration in Evaluation](#).

<sup>49</sup> International Development Research Center (IDRC). (n.d.). [Guide to Integrating Gender in your Proposal](#).

<sup>50</sup> World Food Programme (WFP). Gender & Stakeholder Analysis.

<sup>51</sup> UN Women. (2020). [Good Practice in Gender Responsive Evaluations](#).

Aligned to the purpose of the evaluations, gender responsive evaluations can achieve two things:

- **Exert influence:** Evaluations can influence and direct policies, programs, and investments to have greater impact on adults and children, by generating knowledge and evidence of what works, why, and for whom.<sup>52</sup>
- **Promote social change:** Evaluations can help promote social change by using the knowledge produced from an evaluation for better R4D programming that promotes gender equality, women's empowerment, and human rights in a sustainable manner.<sup>53</sup>

A gender responsive evaluation consists of two main components:

1. **What the evaluation examines.** The evaluation assesses the degree to which gender and power relationships change as a result of an intervention.<sup>54</sup> Gender responsive evaluations use a gender analysis framework which examines structures of political and social control that create gender equality.<sup>55 56</sup>
2. **How the evaluation is implemented:**<sup>57</sup> A gender responsive evaluation process is inclusive, participatory, and respectful of all stakeholders. It ensures that women's voices, and other often excluded groups, are well-represented throughout the evaluation.<sup>58</sup> Good practices entail measures to maximize inclusion and participation.<sup>59</sup>

### **Adapting Qualitative and Feminist Evaluation Approaches to the CGIAR Context**

CGIAR evaluations rely on **mixed-methods** design, with a growing recognition of the value of feminist methodologies to uncover how gender, power, and inclusion dynamics play out in both research processes and organizational structures. These approaches can be adapted to the CGIAR context in several practical ways:

- **Mixed methods:** Working within CGIAR's science-focused institutional culture requires positioning qualitative approaches as complementary to quantitative evidence. These methods should adhere to the principles of scientific inquiry while enabling open-ended, experience-based exploration of gender, inclusion, and equity dimensions. This alignment reinforces the credibility of qualitative evidence and its acceptance within a research-oriented environment.
- **Addressing hierarchical dynamics:** Given the power structures in CGIAR research teams, evaluators may need to anonymize inputs and triangulate across to ensure diverse and safe participation.
- **Field realities of CGIAR initiatives:** Adapting data collection tools for multilingual and multicultural contexts across CGIAR's global reach requires localized facilitation strategies.
- **Balancing participation with evaluation independence:** Qualitative approaches emphasize co-creation and empowerment. In CGIAR evaluations, this may translate into stakeholder-led

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<sup>52</sup> Ibid.

<sup>53</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis](#).

<sup>54</sup> UNICEF. (n.d.). [Guidance on Gender Integration in Evaluation](#).

<sup>55</sup> [22nd CGIAR System Council Meeting \(SC22\). \(2025\). GDI now re-framed to C&E](#).

<sup>56</sup> Ibid.

<sup>57</sup> Ibid.

<sup>58</sup> UNICEF. (n.d.). [Guidance on Gender Integration in Evaluation](#).

<sup>59</sup> Ibid.

question refinement, validation workshops, recommendation refinement, and feedback loops that still respect the evaluation's accountability role.

These adaptations are essential to ensure that inclusive methodologies are not only theoretically aligned but also practically feasible and impactful in CGIAR's diverse research environments.

## 5.5. Terms of Reference

The evaluation ToR guide the evaluation's design, commissioning, and implementation. Incorporating GDI and GEYSI into the ToR is required to ensure they are addressed during evaluative inquiry. The ToR can include an evaluative focus on:

- how inclusion and diversity are defined and applied in the specific context and addressed, and
- data gaps identified by the EA that relate to GDI and are relevant to the evaluation.

**Table 8. Evaluation ToR—key GDI and GEYSI considerations**

| ToR section                                   | GDI<br>internal inclusion (workforce,<br>organizational culture)                                                                                                                                                                                                                                                                                                                                                                | GEYSI<br>external inclusion (beneficiaries,<br>research context)                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Background and context</b>                 | <ul style="list-style-type: none"> <li>• Groups of concern and which groups are particularly marginalized or vulnerable are defined, within three areas: management, leadership, and research teams.</li> <li>• Up-to-date, disaggregated GDI data is included.</li> </ul>                                                                                                                                                      | <ul style="list-style-type: none"> <li>• Groups of concern are described, and which groups are particularly marginalized or vulnerable in the project context are identified.</li> <li>• Disaggregated data is included.</li> </ul>                                                                                                                                                                       |
| <b>Framework (purpose, objectives, scope)</b> | <ul style="list-style-type: none"> <li>• GDI is part of the evaluation scope.</li> <li>• ToR background covers the relevant GDI issues.</li> <li>• Intended use of GDI-related findings is clarified.</li> <li>• Indicators are elaborated to assess GDI changes in over time.</li> <li>• The need to integrate findings, conclusions and recommendations reflecting a GDI analysis is clearly indicated by the ToR.</li> </ul> | <ul style="list-style-type: none"> <li>• Evaluation purpose, objectives and context include GEYSI considerations.</li> <li>• How GEYSI-related findings will be used and by whom are stated.</li> <li>• Representative data are disaggregated by sex, youth, and other social inclusion criteria.</li> <li>• Description of how GEYSI issues will be addressed and analyzed in the evaluation.</li> </ul> |
| <b>Evaluation criteria and questions</b>      | <ul style="list-style-type: none"> <li>• Questions about representation, diversity, and inclusion in team composition, leadership, and decision-making are included.</li> </ul>                                                                                                                                                                                                                                                 | <ul style="list-style-type: none"> <li>• Questions examining impacts on excluded farming populations and the inclusiveness of processes are included.</li> <li>• GEYSI-specific questions and lines of inquiry are included.</li> </ul>                                                                                                                                                                   |
| <b>Design and methods</b>                     | <ul style="list-style-type: none"> <li>• Evaluation criteria and proposed evaluation questions include specific references to GDI.</li> <li>• GDI issues are incorporated into the evaluation objective and methodology.</li> <li>• Internal data sources are used.</li> <li>• Safe and inclusive environments for open discussion are ensured.</li> </ul>                                                                      | <ul style="list-style-type: none"> <li>• Data that reflect the perspective, knowledge and experiences of participants and other key stakeholders, as appropriate, are reflected in evaluation methods.</li> <li>• Participatory and inclusive processes that are culturally appropriate are ensured in data collection processes.</li> </ul>                                                              |

| ToR section                   | GDI<br>internal inclusion (workforce,<br>organizational culture)                                                                                                                                                                                                                                                                       | GEYSI<br>external inclusion (beneficiaries,<br>research context)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | <ul style="list-style-type: none"> <li>GDI data sources include those provided by the GDI. To fill any data gaps or address additional GDI questions in the evaluative process, the design should include questions in the evaluation tools and methods.</li> </ul>                                                                    | <ul style="list-style-type: none"> <li>Enabling environments where people can speak freely and openly are created by data collection processes and tools.</li> <li>Participatory and inclusive methods are promoted.</li> <li>Culturally appropriate tools and safe spaces for participants are ensured.</li> </ul>                                                                                                                                                                                                                                                                            |
| <b>Stakeholder engagement</b> | <ul style="list-style-type: none"> <li>Leaders, staff across levels, and HR units are involved.</li> <li>Diverse voices are represented.</li> <li>The stakeholder group identified is likely to provide different perspectives that lead to holistic interpretations and findings.</li> </ul>                                          | <ul style="list-style-type: none"> <li>Participatory methods are expected and expectations for the inclusion of diverse stakeholders are specified.</li> <li>Key stakeholders of the intervention, their role in the evaluation and their potential use of the evaluation results, are clarified.</li> <li>Community members, local organizations, and affected groups are involved.</li> <li>Expectations regarding the potential need for multiple data collection approaches and tools are clarified to ensure that all stakeholder groups are equally and meaningfully engaged.</li> </ul> |
| <b>Evaluation team</b>        | <ul style="list-style-type: none"> <li>Level of expertise needed among the evaluation team on GDI is clarified in ToR.</li> <li>A GDI-balanced team is called for.</li> <li>What a GDI-balanced team should look like is described.</li> <li>Familiarity with organizational inclusion and diversity dynamics are included.</li> </ul> | <ul style="list-style-type: none"> <li>Team requirements, including gender expertise, are well defined. See also section on selecting the evaluation team.</li> <li>Included expertise in gender-responsive and socially inclusive evaluation are included.</li> </ul>                                                                                                                                                                                                                                                                                                                         |
| <b>Ethics and Conduct</b>     | <ul style="list-style-type: none"> <li>CGIAR's ethics principles, especially dignity and respect in workplace settings, are reflected.</li> <li>How the evaluative work will tackle any CGIAR GDI issues are described.</li> </ul>                                                                                                     | <ul style="list-style-type: none"> <li>The CGIAR research ethics code principal of dignity and respect is well reflected throughout the ToR.</li> <li>Safety, dignity, and respect for vulnerable participants during fieldwork are emphasized.</li> </ul>                                                                                                                                                                                                                                                                                                                                     |

#### Box 10. Resources on writing ToRs

[UN Women's Independent Evaluation Office](#) provides a useful evaluation ToR outline and description of what information should be included for each component as well as a ToR template. The recent [ToR: CGIAR SG Evaluations](#) provides an example of how to integrate GEYSI within a ToR, with gender as a crosscutting theme.

## 5.6. Selecting the Evaluation Team

In addition to evaluation and research skills, the evaluation team should have gender and social inclusion evaluation expertise, facilitation skills and experience applying participatory evaluation methods.<sup>60</sup> Some specific questions to assess team qualifications include:

1. To what extent are gender, youth and social inclusion dimensions reflected across the skills and background of the evaluator/evaluation team?
2. Do team members have previous experience in evaluating projects related to GEYSI?
3. Do team members have previous experience in conducting gender responsive, gender transformative, or feminist evaluations?
4. Do team members show evidence of extensive knowledge of, and experience in applying qualitative and/or quantitative evaluation methods to collect gender, age, and other-disaggregated data?<sup>61</sup>
5. Do qualitative evaluators have strong facilitation skills to help surface, explore, and diffuse potentially sensitive issues around gender norms influencing the attitudes and behaviors of girls and boys, and men and women?<sup>62</sup>
6. Are quantitative evaluators familiar with how to incorporate gender, youth and social inclusion into quantitative methods and approaches?
7. For large evaluation teams, are different genders well represented? Are there evaluators from diverse geographic locations (e.g., north and south, local and international)?<sup>63</sup>

Notably, having women on the evaluation team does not necessarily mean having a gender expert.<sup>64</sup>

#### **Box 11. Informing GEYSI evaluation from the GSI evaluation sub-study under SGs (2023)**

The 2023 evaluation of the GSI approach in CGIAR highlighted several practical insights for evaluators, including:

- **Clarify the concept of social inclusion.** Define what social inclusion means in each context and ensure indicators reflect intersecting identities and exclusion dynamics.
- **Reach the most vulnerable.** Involve marginalized stakeholders at the design phase, especially during stakeholder analysis and data collection.
- **Strengthen evaluator capacity.** Include expertise on cross-cutting knowledge (gender, youth, disability, intersectionality) in evaluation teams.
- **Improve gender tagging insights.** Deeper qualitative exploration on tagging systems, their accuracy and use are advised.

Evaluators should refer to these findings when selecting questions, methods, and stakeholder engagement strategies.

<sup>60</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis](#).

<sup>61</sup> Ibid.

<sup>62</sup> Ibid.

<sup>63</sup> Ibid.

<sup>64</sup> IDRC. (n.d.). [Guide to Integrating Gender in your Proposal](#).

## 6. Conducting the Evaluation

Practical steps for conducting the evaluation, which are applied while evaluating either GEYSI, GDI or both, involve four main components that lead to the [final evaluation report](#) or a Knowledge Management product.<sup>65</sup> Each component and output require a GEYSI and/or GDI lens for:

- Scoping and inception phase: concept note and inception report
- Data collection and tools, and data analysis
- Validation of findings and co-development of recommendations.

The GDI focus requires fewer steps as identified in GEYSI, some captured in an organizational assessments (see example [Component Study: Governance, the use of human resources, and change management—Evaluation of CGIAR Platform Excellence in Breeding](#)). This section focuses on GDI-specific considerations during the evaluation process and cross-references GEYSI sections. The [2025 ToR for GDI Review](#) and [2017 Evaluation of Gender in CGIAR Workplace](#) may be consulted as examples.<sup>66</sup>

**Table 9. Evaluation questions from the GDI Evaluation (2017)**

| Evaluation questions |                                                                                                                                                                                                                                                                           |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.                   | Is there a clearly articulated case for how gender equity will enhance performance of CGIAR and strengthen its ability to deliver on its mission?                                                                                                                         |
| 2.                   | Does the representation of men and women across major categories of managers, professionals and staff appear equitable given the supply and pipeline of male and female talent across disciplines, years of professional experience, and regional workforce demographics? |
| 3.                   | Do the centers have policies and practices in place that facilitate the recruitment and advancement of high-quality male and female talent and ensure the unbiased consideration of candidates?                                                                           |
| 4.                   | Do the centers have similar rates of retention of men and women within managerial, professional, and staff levels?                                                                                                                                                        |
| 5.                   | To what extent are formal and informal decision-making processes at consortium and center levels inclusive and representative of both men and women?                                                                                                                      |
| 6.                   | Does the work environment and organizational culture foster respect of all individuals, fairness, and appreciation of the value of diversity in the workforce?                                                                                                            |
| 7.                   | To what extent have the centers and the consortium office implemented key policies and practices to ensure gender equity, diversity, and inclusion in the workplace?                                                                                                      |

### 6.1. Inception Phase and Report

This section is common for GDI and GEYSI. The inception phase clarifies the ToR (internal to CGIAR) provided to the evaluation team. The evaluation team uses the ToR to produce an inception report that contains an expanded evaluation plan. Table 10 provides questions that can be used to both guide and assess if and how an inception report addresses GEYSI and/or GDI.

<sup>65</sup> World Food Programme (WFP). Gender & Stakeholder Analysis.

<sup>66</sup> GDI review was ongoing when finalizing this document.

**Table 10. Questions to guide the inception report**

| Key inception report components                             | GEYSI and/or GDI considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Evaluation questions</b>                              | <ul style="list-style-type: none"> <li>What GEYSI and/or GDI questions are included?</li> <li>What, if any, additional questions could be added that bring critical information to the various evaluation user groups?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>2. Evaluation approaches and data collection methods</b> | <ul style="list-style-type: none"> <li>What gender, feminist or other human rights approach is integrated into the main evaluation approach (if a gender or other similar approach is not the guiding approach)?</li> <li>How does the evaluation approach address GEYSI and/or GDI?</li> <li>How does the sampling approach strategically ensure that data are gathered from various perspectives?</li> <li>How do data collection methods support the collection of data that brings diverse perspectives into the evaluation findings and informs recommendations?</li> <li>How flexible is the approach to overcome unforeseen constraints and challenges that may arise due to engaging with diverse stakeholders?<sup>67</sup></li> </ul> |
| <b>3. Data collection tools and analysis</b>                | <ul style="list-style-type: none"> <li>What data collection tools are used to appropriately engage with a diversity of stakeholders?</li> <li>What disaggregated data are planned to be collected that allow for differential analysis of the outcomes achieved on different population groups?</li> <li>What groups are involved in the data analysis and data interpretation? How are they involved?</li> <li>What values are in place that will be used to assess the findings, and how do these reflect the diverse stakeholder voices in relation to GEYSI and/or GDI?</li> </ul>                                                                                                                                                          |
| <b>4. Report writing, recommendations and dissemination</b> | <ul style="list-style-type: none"> <li>Which stakeholder groups are involved in reviewing the draft report? How?</li> <li>Which stakeholder groups are involved in developing and/or reviewing the recommendations? How?</li> <li>Which stakeholder groups will receive the evaluation findings, and what method will be used to share the findings?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |

Source: Adapted from ILO's *Guidance Note 3.1: Integrating Gender Equality in Monitoring and Evaluation*, 2020.

### Box 12. Resources for writing the inception report

[UNICEF](#) and [IOM](#) provide guidance on integrating gender, youth and social inclusion in the inception report. Additionally, [SAMEA](#) provides guidance on how different methods can be used to explore transformative equity aspects.

<sup>67</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis](#).

## 6.2. Data Collection

Common for addressing both GDI and GEYSI, an appropriate **mix of methods** should be used to gather data to offer diverse perspectives and promote participation of a range of stakeholder groups (see Section 5.4 on Evaluation Approaches).<sup>68</sup> Common evaluation tools that can be used in a mixed-methods approach include desk reviews, interviews, focus groups, and surveys. The data collection plan should address how, by whom, when and where the data collection will take place.<sup>69</sup> Considerations include:

- **How data is collected.** The evaluator should identify what methods of data collection are most appropriate based cultural and societal norms, power dynamics between and within different groups, and language use.<sup>70</sup> Other considerations should include, for example, who has access to the internet to complete an online survey, or to complete the full length of a survey. The also includes collecting data that are disaggregated appropriately, depending on the evaluation. A minimum for CGIAR is to disaggregate by male and female, though more categories are likely useful (e.g., age, country of origin). Wherever possible, data should come from more than one source (e.g., data triangulation).
- **Who collects the data.** Who collects the data may affect the validity of findings.<sup>71</sup> For example, female interviewers/facilitators can often more effectively engage with women and girls and thereby increase their participation in an evaluation.<sup>72</sup>
- **When and where the data are collected.** Different population groups may be available to participate at different times, due to different responsibilities and activities.<sup>73</sup> Consideration should be given to provide opportunities for participation that are conducive to all key groups participating in the evaluation process.

Special care should be taken in group settings where existing hierarchies may influence the quantity and quality of participation. Facilitation techniques that ensure diverse voices are heard, such as rotating speaking turns, anonymous inputs, or sub-group discussions, can help mitigate dominance by power holders and support more inclusive gender-responsive data collection.

### Box 13. Real case—data collection with an equity lens

During the [CGIAR Genebank Evaluation \(2024\)](#), the evaluation team collected sex-disaggregated data on training participants in germplasm health and seed management. Analysis showed that women scientists were under-represented in training opportunities, leading to recommendations for more inclusive capacity development.

The **data collection plan** in the inception report should identify what data is to be collected by **gender, sex**, and/or other **disaggregation** to bring necessary insights to the evaluation.

Source: *CGIAR Genebank Evaluation Report, 2024.*

<sup>68</sup> UNEG (2013). [UNEG Handbook for Conducting Evaluations of Normative Work in the UN System.](#)

<sup>69</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis.](#)

<sup>70</sup> [22nd CGIAR System Council Meeting \(SC22\).](#) (2025). GDI now re-framed to C&E.

<sup>71</sup> Global Affairs Canada (GAC). (2019). [Integrating Gender-Based Analysis Plus into Evaluations A Primer.](#)

<sup>72</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis.](#)

<sup>73</sup> Ibid.

Existing internal program data are useful sources of **quantitative** data, including the [CGIAR Result Dashboard](#), [CGIAR Workforce Dashboard](#), and [annual reports](#). For instance, the Results Dashboard provides data on gender tagging of outputs and outcomes, supporting analysis regarding design/entry (i.e., to what extent GEYSI was considered at design phase). **Annual reports** may provide specific information regarding GEYSI program impact.

Additionally, data against **indicators** such as on physical disability, asset ownership, income, education, race, age, or ethnicity offer insight into social differentiation. Such data can help **identify inequities** in access to and benefit from CGIAR research, supporting evaluations in assessing relevance, effectiveness, and equity of outcomes. Within CGIAR, **instruments** such as the [Women's Empowerment in Agriculture Index \(WEAI\)](#)—and its sector-specific versions for livestock, fisheries, and market inclusion—are widely used and adapted. These tools offer sex-disaggregated data on empowerment across domains, providing strong secondary data resources for scoping and/or data analysis.

#### **Box 14. Questions to guide the data collection plan**

##### **Sampling and inclusion considerations**

- From what stakeholder groups will data be collected (e.g., internal, external, partners, beneficiaries)?
- To what extent will data be collected based on gender identity, sex, or other intersecting identity factors, such as race, ethnicity, religion, age, and mental or physical disability?
- How was that decisions made?
- How will needs and/or preferences of different stakeholder groups be integrated or addressed and how, when, and where will data be collected?

##### **Disaggregation of data**

- Are the collected data sex and age-disaggregated wherever possible?
- What are other considerations for disaggregation?

##### **Data collection tools**

- Do surveys, interview questions, and other data collection instruments include equity and inclusion considerations, as appropriate?
- Are questions worded and constructed to be socially and culturally appropriate?
- Do any data collection tools need to be translated or provided in alternative formats?
- How are local evaluators or data collectors engaged, if at all?

##### **Implementing data collection**

- What strategies are in place to ensure participation of all identified stakeholder groups?
- What considerations are identified that could jeopardize the participation of different groups (e.g., interviewer's sex or gender identity, interview time or location, power dynamics, safety issues) and how are these addressed?
- During data collection, are the persons being interviewed diverse and representative of all concerned project partners and beneficiaries?

*Source: The questions above are adopted from UNICEF's Guidance on Gender Integration in Evaluation. Global Affairs Canada's Integrating Gender-Based Analysis Plus into Evaluations A Primer, and IOM's 2018 Guidance for Addressing Gender in Evaluations. Office of the Inspector General.*

In addition to outlining general data collection considerations, it is important to recognize how **qualitative methods** can be contextually adapted to the CGIAR environment. The following box illustrates how qualitative methods were adjusted in practice during a recent CGIAR evaluation.

Box 15: Adapting qualitative methods in CGIAR evaluations

Real Case: Adapting Qualitative Methods in CGIAR Evaluations

In the 2024 evaluation of the ST SG, the evaluation team employed a combination of qualitative tools—including key informant interviews and gender-sensitive focus group discussions—specifically tailored to CGIAR’s internal structure. For example:

- Interviews with senior scientists and managers included indirect questions to surface perspectives on gender roles without triggering defensiveness in hierarchical settings.
- Focus groups with early-career staff were organized outside formal office hours to encourage openness and mitigate perceived risks.
- Facilitators adapted tools to reflect local languages and idioms while maintaining analytical consistency across regions.

These adaptations illustrate how qualitative methods can be made context-sensitive, ethical, and operationally viable within CGIAR evaluations.

6.3. Data Analysis

Integrating GDI and GEYSI into the data collection and analysis phase align in the following ways:

- Uncover and address exclusion and inequity in CGIAR work.
- Require disaggregated data to assess equity and differential outcomes.
- Require examining whether the Initiative reduces or exacerbates equity gaps.
- Include participatory analysis, trend/pattern identification, and attention to differential outcomes.
- Use triangulation, mixed methods, and intersectional lenses.
- Benefit from inclusive, participatory methods such as focus groups discussions, Data Walks, and community feedback loops.

Table 11. Elements of GDI and GEYSI in data collection and analysis

| ToR section         | GDI—internal inclusion (workforce, organizational culture)                                                                                                                                                                                                       | GEYSI—external inclusion (end users, partners)                                                                                                                                                                                                                                                                                |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Focus of Inclusion  |                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                               |
| Equity Gap Analysis | <ul style="list-style-type: none"><li>• Focus on internal diversity and inclusion in staffing, leadership, and workplace culture.</li><li>• Emphasis on power dynamics and representativeness in decision-making structures and scientific leadership.</li></ul> | <ul style="list-style-type: none"><li>• Focus on external groups affected by research (e.g., women, youth, marginalized populations) and partners.</li><li>• Emphasis on co-design and implementation, and ‘last mile’ service delivery, outcomes by population group, and social inclusion in access and benefits.</li></ul> |
|                     | For early career and mid-career researchers in the workforce and partner institutions/organizations, evaluation questions should consider comparing outcomes by additional factors such as publications in high-impact peer-reviewed journals, success in        |                                                                                                                                                                                                                                                                                                                               |

| ToR section                  | GDI—internal inclusion (workforce, organizational culture)                                                                                                                                        | GEYSI—external inclusion (end users, partners)                                                                                  |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
|                              | securing grant proposals, development of skills and expertise in their specialized fields, and the practical application, uptake, adoption, and scaling of their research outputs <sup>74</sup> . |                                                                                                                                 |
| <b>Data Disaggregation</b>   | Disaggregation by role, function, career level, gender identity, nationality, and organizational positioning.                                                                                     | Disaggregation by sex, age, ethnicity, indigeneity, poverty, education, disability, and stakeholder type.                       |
| <b>Analytical Approaches</b> | Methods include organizational surveys, staff focus groups, equity audits, and internal diversity, equity, inclusion assessments.                                                                 | Methods include community engagement, beneficiary focus groups, youth-sensitive analysis, and contextual vulnerability mapping. |
| <b>Evaluation Techniques</b> | Aligns with organizational change and accountability frameworks.                                                                                                                                  | Aligns with gender-transformative and feminist evaluation principles.                                                           |
| <b>Participatory Methods</b> | Engages internal stakeholders (e.g., HR, leadership, staff associations) in reviewing patterns and root causes.                                                                                   | Engages external stakeholders in validating findings and shaping recommendations.                                               |

During data collection and analysis, it is essential to consider the extent to which needs and priorities are being addressed. An analysis of differential results across groups and the extent to which the intervention contributes to or exacerbates equity gaps is a critical element for evaluations.<sup>75</sup> Attention should be given to trends, patterns, and differences among diverse groups and diverse voices. There is a need to balance aggregation with specificity, with a sharper focus on the categories of the underrepresented groups and on project delivery, rather than on average coverage and results.<sup>76</sup>

There are multiple dimensions to analyzing data to enable recognizing diverse voices.<sup>77</sup> **Participatory approaches** can engage various viewpoints which will lead to deeper insights to better understand the data and inform stronger empirical findings. For example, the evaluation team can lead different groups to engage with the data and provide their interpretations. **Data Walks** is one approach, where data are placed on the wall and participants can make meaning of that data facilitated by the evaluation team.

<sup>74</sup> Resources on Quality of Science for Development [hib https://iaes.cgiar.org/evaluation/evaluating-quality-science-sustainable-development](https://iaes.cgiar.org/evaluation/evaluating-quality-science-sustainable-development)

<sup>75</sup> International Fund for Agricultural Development (IFAD). (2022). IFAD Evaluation Manual: Part I.

<sup>76</sup> Ibid.

<sup>77</sup> UNEG (2011). Integrating Human Rights and Gender Equality in Evaluation—Towards UNEG Guidance.

To deepen intersectional analysis, evaluation teams should consider layering multiple identity factors—such as ethnicity, disability, education, migration status, or caste—into data disaggregation and

### Box 16. Real case—intersectional analysis in practice

ST SG Evaluation (2024) compared outcomes for rural women by age. Findings showed that young women (<30) benefited less from climate-smart practices than older women, mainly due to land access constraints. This intersectional analysis underscored the need to integrate youth perspectives in gender-responsive agricultural research.

Source: *Gender and Social Inclusion Evaluations of Science Groups, 2024.*

interpretation. Simple gender or age comparisons are often insufficient to capture systemic exclusions.

Illustrative questions that can be used as guidance to support data analysis are provided in Box 17. UNEG (2011) provides additional guidance of how to address GEYSI using desk review, focus groups, interviews, and surveys.

### Box 17. Illustrative questions for data analysis

#### Individuals or group analysis

- Does the evidence explore how and if some target population groups are affected more negatively or more positively?
- Is there evidence of structural barriers to participation and/or benefit? If so, is there evidence that their root causes are based on unequal power dynamics?
- What themes emerged in terms of equity and inclusion?
- What evidence explores how people are affected differently based on equity and inclusion factors such as a gender, race, ethnicity, culture?
- What key voices identified in the stakeholder analysis bring different viewpoints? How is this difference explained?

#### Program/project/policy or other CGIAR product

- Is there evidence that the project/program/policy or other CGIAR product reduces, maintains, or increases inequalities?
- How does the analysis explore the extent to which the project/program/policy or other CGIAR product addressed structural factors that contribute to inequalities experienced by marginalized groups?

Source: Questions are adopted from UNICEF's *Guidance on Gender Integration in Evaluation and Global Affairs* and Canada's *Integrating Gender-Based Analysis Plus into Evaluations: A Primer*.

Box 18 provides some themes that can be used to explore GDI data:

### Box 18. Themes examples that can be used when analyzing GDI data

- **Trends in CGIAR's GDI.** Describe what changes or trends are apparent in terms of, e.g., who is employed, who is employed in what role, length of employment, who is advanced within the CGIAR system, who attends or received training in leadership or other training that strengthens the likelihood of advancement.
- **Data use.** Describe how data is used to promote GDI in workforce planning and decision-making.
- **Gender.** Describe gender roles and challenges at different levels in the workplace. Examine gender disaggregated data to understand if/where inequalities exist.
- **Diversity.** Describe what kinds of diversity existed beyond gender (e.g., nationality, age).

- **Inclusion.** Discuss what inclusion looked like in practice and what barriers were encountered.
- **Leadership.** Describe how was leadership encouraged to be inclusive and/or what barriers remain.
- **Safe and respectful workplace.** Describe examples of a shared approach to safe and respectful workplaces or describe examples that suggest the opposite.
- **Engaging with GDI.** Describe how the entity engaged with GDI, and the successes and challenges encountered.
- **Discrimination.** Describe any discrimination that occurs by, e.g., sex, gender, racial and ethnic, migrant workers, religion, social origin, age, sexual orientation, disability, people with HIV/AIDS, and lifestyle choices.

Source: Some ideas are drawn from [Equality at Work: Tackling the Challenges](#), 2007.

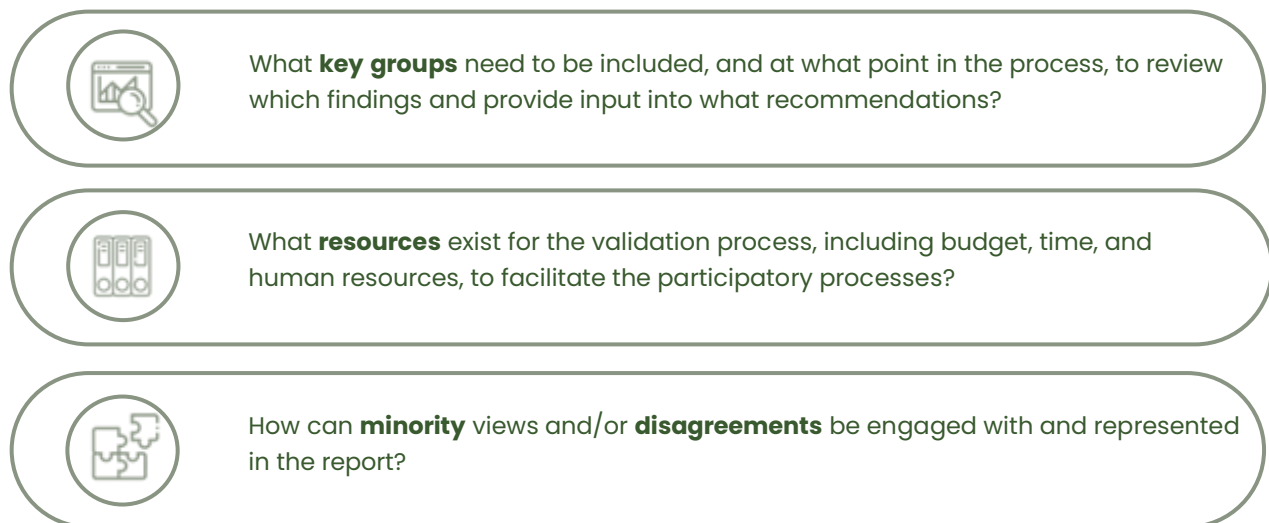
## 6.4. Validation of Findings, Recommendations & Evaluation Report

A **validation plan** outlines how evaluation findings and related recommendations will be validated from diverse perspectives.<sup>78</sup> Validation processes should be designed to promote meaningful participation and power-sensitive feedback, particularly from marginalized or under-represented stakeholder groups.

For example, **preliminary findings** can be shared and discussed during an online or in-person validation workshop organized with targeted stakeholder groups, including local partners, research teams, or youth representatives. These sessions can be structured around guiding questions to ensure focused feedback. In some cases, follow-up email consultations may supplement workshops by reaching individuals who cannot attend synchronously, although this method alone is generally less inclusive and should not be the primary approach.

To support an effective and impactful Management Response and its implementation (see [MER Hub](#) and related guidance), the following three key considerations for the validation of findings and co-developing recommendation process include:<sup>79</sup>

**Figure 13. Key considerations for finding's validation & recommendations co-development process**



<sup>78</sup> World Food Programme (WFP). (n.d.). [Gender & Stakeholder Analysis](#).

<sup>79</sup> See [Management Engagement and Response Evaluation Guidelines on the portal](#).

Inclusion of lessons learned are useful to CGIAR. A strong example of how to write lessons learned is provided in the 2020 [Evaluation Synthesis of Gender Mainstreaming at the African Development Bank](#).

### **Box 19. Recommendations**

Recommendations are a critical component of the CGIAR process and performance evaluations, guided by the [Management Engagement and Response Guidelines](#) and [Evaluation report development](#). Recommendations are validated by CGIAR management and receive a formal response (see below). The [2024 SG Evaluations, 2021 Synthesis Report](#), the [CGIAR Research Program \(CRP\) 2020 Reviews: Climate Change, Agriculture and Food Security](#) and [WHEAT CRP, the 2023 GENDER Platform Evaluation](#), and the [2017 Evaluation of Gender in Research and in CGIAR Workplace](#) all provide examples of GEYSI and GDI related recommendations:

- Align work on gender, equity, and social inclusion with the Gender Strategy being developed (Rec. 15, SG evaluations).
- Further broaden the internal skills set to include more social scientists, gender, partnerships, and communication experts. (Rec. 7, SG Evaluations)
- Improve the coverage of crosscutting themes (e.g., gender, youth) in MELIA by strengthening evaluators' relevant disciplinary skills as applied to evaluation design and implementation. (Rec. 30, 2021 Synthesis):
- Develop a stronger feminist and political science perspective that could enable CCAFS to engage more effectively on equity and affirmative measures, including as part of transformative change thinking (Rec. 6, CCAFS).
- Select a few key gender findings that are useful to specific Flagship Program interventions or research, integrate these findings, and ensure gender aspects are included in effectiveness assessments. Require that gender statistics are collected and reported for all training, workshops, and conferences; use statistics to better understand and improve participation levels where appropriate, not as a box-ticking exercise. (WHEAT)

## **6.5. Dissemination of Evaluation Results**

Interweaving GEYSI and/or GDI into the final report can be done in various ways, from synthesizing the findings into the overall evaluation findings, comparing the findings to the more general findings, and/or providing a specific space in the report (e.g., text boxes). A separate evaluation report focusing on GEYSI and GDI findings can be prepared with more detailed, in-depth findings.

## Box 20. Questions to inform and guide the evaluation report writing

The questions below support an evaluation report to engage with GEYSI and/or GDI by highlighting what to address in key evaluation report sections.

### Methodology section

- **Stakeholders.** Identify what stakeholder groups participated in the evaluation and how diverse target groups were included. Describe how the interviewed partners and key stakeholders represent GEYSI and/or GDI.
- **Data collection methods.** Describe how data collection methods generated GEYSI and/or GDI data.
- **Data analysis.** Describe how the data analysis explicitly and transparently triangulated the voices of different groups, and/or disaggregates quantitative data, where applicable.

### Findings section

- Ensure that the evaluation findings explicitly discuss GEYSI and/or GDI.
- For a strong report, GEYSI and/or GDI findings should be interwoven in the entire findings section. Consider when, where and why GEYSI and/or GDI findings should be separate.
- Describe any unanticipated effects of the intervention on GEYSI and/or GDI.
- Reference any findings that support CGIAR's commitment to contribute to accelerated progress towards the GEYSI-related SDGs.

### Conclusions and recommendations

- Provide specific recommendations to address GEYSI and/or GDI issues raised in the report and set priorities for action to improve the situation.
- Highlight good practices and lessons learned regarding GEYSI and/or GDI, which can be further supported and/or expanded.

Source: Information is adopted from three sources. IOM's *Guidance for Addressing Gender in Evaluations*. Office of the Inspector General, UNICEF's *Guidance on Gender Integration in Evaluation*, Global Affairs Canada's *Integrating Gender-Based Analysis Plus into Evaluations A Primer*. ILO's *Guidance Note 3.1: Integrating Gender Equality in Monitoring and Evaluation*, UN Women *Good Practices in Gender Responsive Evaluations*.

## Box 21. GDI vs GEYSI-specific considerations

### GDI-specific considerations (internal focus: CGIAR workforce and institutional practices)

Engage with the GDI Function on specific GDI findings and use their guidance to inform how to report and disseminate GDI findings.

### GEYSI-specific considerations (external focus: beneficiaries and Research Portfolio)

Leverage established knowledge management capabilities, including brief development and multilingual translation services to ensure GEYSI findings are appropriately contextualized and disseminated.

An **evaluation dissemination strategy** is a systematic plan for disseminating evaluation results to key internal and external stakeholders through diverse, effective, creative, and barrier-free methods.<sup>80</sup> Box 22 provides three considerations to support a dissemination process that engages people who bring a GEYSI and GDI focus.

### Box 22. Developing the dissemination plan

Consider how GEYSI and/or GDI evaluation findings will be shared with the project partners. For example, consider:

- **Key stakeholders.** Who needs to receive what information on GEYSI and/or GDI? For example, when the draft report is being circulated to stakeholders for comments, how are stakeholders included who bring a GEYSI and/or GDI focus?
- **Channels of dissemination.** How will evaluation products be developed so that they are accessible with feasible dissemination channels (e.g., social media, blogs, briefings) to people who bring a GEYSI and/or GDI focus?
- **Formats of final products.** Multiple accessible formats should be considered for different GEYSI and/or GDI groups who are interested in the evaluation findings (e.g., briefs, written reports, presentations, formal and informal).

Source: Information that is adopted from ILO's *Guidance Note 3.1: Integrating gender equality in monitoring and evaluation*, UNICEF's *Guidance on Gender Integration in Evaluation*, SAMEA's *2022 Evaluation Guidelines No 2.2.2: Integrating a transformative equity criterion into evaluations for promoting transformative systematic change*.

### Box 23. Resources on disseminating evaluation reports and findings

[UN Women IEO](#) provides a template (p. 151) for developing an evaluation dissemination strategy as well as a list of common dissemination forums (p. 159).

## 6.6. Management Response and Action Plan

In response to formal evaluation recommendations, CGIAR management is responsible for preparing and implementing a Management Response (MR). The evaluation team is not part of the MR process. However, recommendations formulated in the evaluation report become a starting point for the MR process, and clear, relevant, actionable and justifiable recommendations are needed.

From a GEYSI and GDI perspective, the MR process should intentionally include **individuals** or **units** with insights into gender, youth, and inclusion dynamics. Evaluation teams are encouraged to advise evaluation managers and commissioners on who should be involved in preparing the MR, based on their understanding of marginalized groups, power dynamics, and knowledge gaps. This may include **focal points** from HR, GDI/GEI Accelerators, youth networks, or regional program teams with inclusion mandates.

As committed in the [Review of CGIAR MR System to Independent Evaluations](#) [SC decision: M21-EDP9] IAES with evaluators should suggest stakeholders to the Portfolio Performance Unit (PPU) to support inclusive and informed MR processes, and status then captured in the [MR Actions Tracker](#).<sup>81</sup>

The evaluand/CGIAR management can consider these practical questions in developing a MR to the GEYSI and/or GDI recommendations:

1. How can the MR feasibly address GEYSI and/or GDI recommendations?

<sup>80</sup> [22nd CGIAR System Council Meeting \(SC22\)](#). (2025). [GDI now re-framed to C&E](#).

<sup>81</sup> See [2021 Synthesis Report MR](#) for an example of the CGIAR MR.

2. What recommendations refer to structural challenges and require a system-focused response?
3. What potential practical limitations exist that constrain the recommendation's implementation that need to be acknowledged?
4. How can recommendations, if implemented, affect different population groups, how will this be monitored, and by whom?
5. Who are the standard bearers and champions assuming responsibility and taking accountability for management response actions that relate to gender, diversity, inclusion in CGIAR and CGIAR research?

## 7. Toolkit: Cheat Sheet—GDI vs. GEYSI

**GEYSI and GDI in Evaluation: Quick Reference for Evaluators.** Its aim is to help evaluators distinguish between GEYSI and GDI and apply both consistently throughout the evaluation cycle.

**Table 12. Cheat Sheet GDI vs. GEYSI**

| Feature                 | GDI (internal)                                                                                                                                                                                                              | GEYSI (external)                                                                                                                                                                                        |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Focus</b>            | Staff, research teams, workplace culture. Who conducts the work inside CGIAR.                                                                                                                                               | Beneficiaries, communities, research users Who benefits from CGIAR research and innovations.                                                                                                            |
| <b>Who it covers</b>    | Researchers, leadership, staff, management teams, consultants, boards.                                                                                                                                                      | Women, men, youth, Indigenous Peoples, marginalized groups, persons with disabilities.                                                                                                                  |
| <b>Evaluation scope</b> | Team composition, HR policies, inclusion practices.                                                                                                                                                                         | Research design, participation, access to benefits, outcomes.                                                                                                                                           |
| <b>Evaluation lens</b>  | Diversity, inclusion, and fairness within CGIAR's workforce and organizational culture.                                                                                                                                     | Equity of access, participation, and benefits in CGIAR research.                                                                                                                                        |
| <b>Indicators</b>       | Workforce data (e.g., gender balance, leadership roles).                                                                                                                                                                    | Disaggregated outcome data (e.g., gender, age, ethnicity).                                                                                                                                              |
| <b>Tools</b>            | HR audits, staff surveys, leadership interviews.                                                                                                                                                                            | Gender analysis, inclusive ToC, stakeholder engagement.                                                                                                                                                 |
| <b>Linked criteria</b>  | Efficiency, QoS, management.                                                                                                                                                                                                | Relevance, effectiveness, impact, QoS, sustainability.                                                                                                                                                  |
| <b>Key questions</b>    | <ul style="list-style-type: none"> <li>Do leadership and teams reflect diversity?</li> <li>Are policies/practices addressing bias and discrimination?</li> <li>Are career opportunities equitable across groups?</li> </ul> | <ul style="list-style-type: none"> <li>Are diverse groups benefiting equally?</li> <li>Whose voices are missing in research design?</li> <li>What barriers exist to equitable participation?</li> </ul> |
| <b>Typical data</b>     | Workforce statistics (gender, nationality, contracts), HR surveys, GDI Matrix indicators.                                                                                                                                   | Sex- and age-disaggregated data, qualitative insights, intersectional analysis.                                                                                                                         |
| <b>Where to look</b>    | HR systems, leadership composition, management practices, organizational policies.                                                                                                                                          | Project and Initiative design, implementation, outputs and outcomes, stakeholder feedback.                                                                                                              |

# Annex 1. Summary Checklist for Assessing GEYSI and GDI in Evaluation

**Table 13. Evaluation questions checklist**

| Evaluation phase                           | Questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Responsible party     |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| <b>Evaluability Assessment</b>             | <ul style="list-style-type: none"> <li>Was an assessment to determine the evaluability level of Gender Equality, Youth, and Social Inclusion (GEYSI) and/or Gender, Diversity and Inclusion (GDI) in the intervention performed?</li> <li>How are gender, youth and/or social inclusion engaged with, if at all?</li> <li>What GEYSI-relevant data exists and what is the data quality?</li> <li>How will GEYSI and/or GDI evaluability challenges be addressed during the evaluation, based on the results of the evaluability assessment (EA)?</li> </ul> | IAES/<br>Commissioner |
| <b>Stakeholder analysis and engagement</b> | <ul style="list-style-type: none"> <li>Was a GEYSI and/or GDI stakeholder analysis performed?</li> <li>Was a diverse group of stakeholders identified from the stakeholder analysis?</li> <li>How will the evaluation team reach out to stakeholders to be engaged in the evaluation to overcome any potential barriers to engagement?</li> <li>Does the evaluation methodology favor stakeholders' right to participation, including those most vulnerable?</li> </ul>                                                                                     | IAES/evaluation team  |
| <b>Evaluation criteria and questions</b>   | <ul style="list-style-type: none"> <li>Were evaluation criteria defined which specifically address GEYSI and/or GDI?</li> <li>Were evaluation questions that specifically address GEYSI and/or GDI framed?</li> </ul>                                                                                                                                                                                                                                                                                                                                       | Evaluation team       |
| <b>Evaluation approaches</b>               | <ul style="list-style-type: none"> <li>Is the evaluation approach gender-responsive (e.g., identify and addresses the needs of diverse groups), feminist or gender-transformative?</li> <li>Does the evaluation approach consider issues of intersectionality?</li> <li>Is the evaluation approach inclusive, participatory, and respectful of all stakeholders?</li> </ul>                                                                                                                                                                                 | Evaluation team       |
| <b>Terms of Reference</b>                  | <ul style="list-style-type: none"> <li>Do the Terms of Reference (ToR) reflect GEYSI throughout (specifically, in scope, design, stakeholder participation, evaluation team and ethical code of conduct)?</li> </ul>                                                                                                                                                                                                                                                                                                                                        | IAES                  |
| <b>Evaluation team</b>                     | <ul style="list-style-type: none"> <li>Was an evaluation team with deep knowledge of and commitment to GEYSI and/or GDI selected?</li> <li>Is the evaluation team diverse, in terms of gender, types of expertise, age, geographical origin?</li> </ul>                                                                                                                                                                                                                                                                                                     | IAES                  |
| <b>Inception phase and report</b>          | <ul style="list-style-type: none"> <li>Does the inception report have GEYSI and/or GDI considerations reflected throughout (e.g., evaluation questions, approaches and</li> </ul>                                                                                                                                                                                                                                                                                                                                                                           | Evaluation team       |

| Evaluation phase                                       | Questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Responsible party     |
|--------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
|                                                        | data collection methods, tools and analysis, report writing, recommendations and dissemination)?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                       |
| <b>Data collection</b>                                 | <ul style="list-style-type: none"> <li>Does the evaluation methodology employ a mixed methods approach, appropriate to addressing GEYSI and/or GDI?</li> <li>Were all stakeholder groups identified in the stakeholder analysis consulted during the evaluation?</li> <li>Were GEYSI and/or GDI considerations made in how data is collected, who collects the data, when and where data is collected?</li> </ul>                                                                                                                                                                       | IAES/evaluation team  |
| <b>Data analysis</b>                                   | <ul style="list-style-type: none"> <li>Does the analysis favor triangulation of the information obtained?</li> <li>Does the analysis include data disaggregated along gender and other relevant GEYSI and/or GDI variables?</li> <li>Were all stakeholder groups consulted at the end of the data collection stage to discuss findings and hear their views on the conclusions and recommendations of the evaluation?</li> </ul>                                                                                                                                                        | Evaluation team       |
| <b>Validation of findings</b>                          | <ul style="list-style-type: none"> <li>Were the evaluation findings validated with key GEYSI and/or GDI stakeholders?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                        | IAES/ evaluation team |
| <b>Evaluation report and dissemination of findings</b> | <ul style="list-style-type: none"> <li>Does the evaluation report address GEYSI and/or GDI issues, including in the recommendations section?</li> <li>Does the evaluation consider how GEYSI and/or GDI evaluation findings will be shared with GEYSI and/or GDI stakeholders?</li> <li>How will the recommendations in the report affect the different stakeholders of the program?</li> <li>Are there plans to disseminate the evaluation report to a wide group, in particular stakeholder groups who have an interest in and/or are affected by GEYSI and/or GDI issues?</li> </ul> | IAES/ evaluation team |
| <b>Management Response and Action Plan</b>             | <ul style="list-style-type: none"> <li>Was a Management Response (MR) prepared which considers the GEYSI and/or GDI issues raised in the report?</li> <li>Did the preparation of the MR and discussion of action points involve a diverse group of stakeholders, including those who have an interest in and/or are affected by GEYSI and/or GDI?</li> </ul>                                                                                                                                                                                                                            | IAES/CGIAR            |

## Annex 2. Additional Evaluation Approaches

### *Gender Transformative Evaluation Approach*

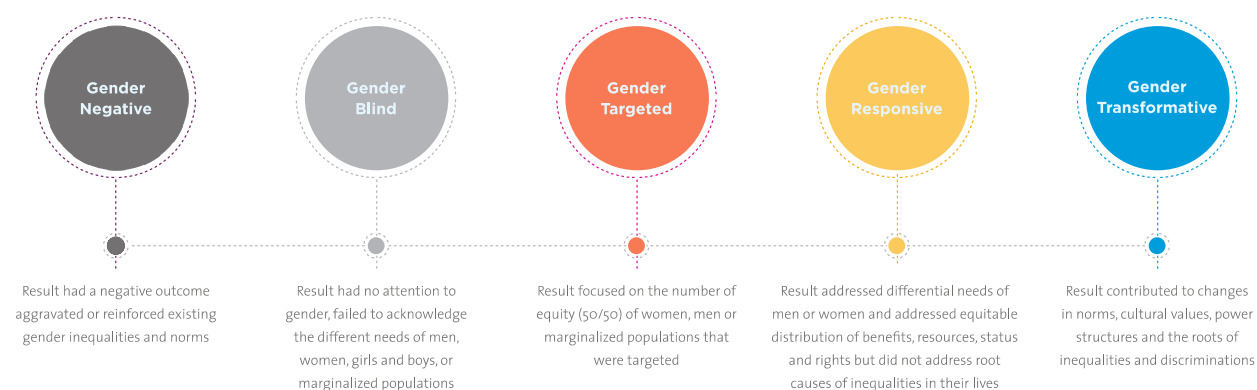
A transformative evaluation approach explicitly seeks to redress gender inequalities and empower disadvantaged populations. It reflects the potential for evaluations across all sectors to tangibly contribute towards social change, not only by determining how well programming interventions and development processes are addressing gender equality concerns, but also through evaluation processes that themselves empower people through meaningful participation.

### *Feminist Evaluation Approach*

A feminist approach addresses the gender inequalities that lead to social injustices and examines opportunities for reversing gender inequalities. It prioritizes women's experiences and voices, including women from groups discriminated against or marginalized. Feminist approaches are one of the key conceptual foundations upon which gender transformative approaches are built. Contemporary feminist approaches are intersectional—they take into account the way people experience multiple forms of discrimination and oppression based on different aspects of their identity (e.g., race, gender, class, disability, sexual orientation or gender identity). Here is an example of a feminist evaluation in the CGIAR.

### *Assessing in the Gender Integration Continuum*

**Figure 14. Assessing in the gender integration continuum**



## Annex 3. GEYSI Evaluation Questions, Organized by Criteria

**Table 14. GEYSI evaluation questions by criteria**

| CGIAR evaluation criteria                                                      | Evaluation questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Relevance: Is the intervention doing the right thing?</b>                   | <ul style="list-style-type: none"> <li>To what extent is the intervention Gender Equality, Youth, and Social Inclusion (GEYSI) sensitive and responsive to context? Evaluators should consider the extent to which potential risks to social inclusion were considered in the intervention design and whether (and how) an intervention adapted.</li> <li>Does the intervention respond to stakeholders' rights, needs and priorities? If a contextual analysis, stakeholder analysis, gender analysis or vulnerability assessment was conducted to inform the design of an intervention, this analysis may be used to assess relevance. Otherwise analysis may be conducted via program documents or one or more of the aforementioned analyses may be undertaken, as needed.</li> <li><a href="#">Organization for Economic Cooperation and Development (OECD) (2023)</a>, <a href="#">Global Affairs Canada (GAC) (2019)</a>, <a href="#">International Labour Organization (ILO) (2020)</a>, and <a href="#">International Organization for Migration (IOM) (2018)</a> provide a list of guiding questions to expand on each of the above questions which are included in <a href="#">Annex 1</a>. The OECD also provides suggestions of how to address challenges that arise in assessing relevance.</li> </ul> |
| <b>Coherence: How well does the intervention fit with other interventions?</b> | <ul style="list-style-type: none"> <li>Internal: To what extent does the intervention coordinate and cooperate with other CGIAR interventions supporting GEYSI and does it strive for synergies? To what extent does the intervention's concept of GEYSI align with other CGIAR interventions?</li> <li>External: To what extent is the intervention consistent with GEYSI policies, strategies, and other interventions of the CGIAR's donor and partner institutions?</li> <li><a href="#">OECD (2023)</a> and <a href="#">GAC (2019)</a> provide a list of guiding questions to evaluate coherence; OECD further provides suggestions on how to address challenges that arise in assessing coherence.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Effectiveness: Is the intervention achieving its objectives?</b>            | <ul style="list-style-type: none"> <li>Design: How well was GEYSI integrated into intervention design and implementation?</li> <li>Achievement of objectives: Is the intervention achieving GEYSI objectives and results, and how?</li> <li>Differential results: Did the intervention affect groups differently and were outcomes equitable?</li> <li>Influencing factors: To what extent did stakeholders participate meaningfully in the intervention's design and implementation?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

| CGIAR evaluation criteria                                  | Evaluation questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Efficiency: How well are resources being used?</b>      | <ul style="list-style-type: none"> <li>To what extent were resources (funds, human resources, time, expertise) allocated strategically to achieve GEYSI objectives?</li> <li>Was the intervention economically efficient in reaching marginalized groups?<sup>82</sup></li> <li>Was the intervention operationally efficient in reaching marginalized groups?</li> <li><a href="#">OECD (2023)</a>, <a href="#">GAC (2019)</a>, <a href="#">ILO (2020)</a>, and <a href="#">IOM (2018)</a> provide a list of guiding questions to expand on each of the above questions; OECD provides suggestions of how to address challenges that arise in assessing efficiency.</li> </ul>                                                                                                                                                                                                                |
| <b>Quality of Science (QoS), credibility, legitimacy</b>   | <ul style="list-style-type: none"> <li>How are gender, youth and social inclusion concerns reflected in the outputs?</li> <li>What is the quality of gender, youth and social inclusion research outputs?</li> <li>Are unintended consequences of intervention activities for GEYSI aspects considered?</li> <li>Additional detail can be found in the <a href="#">Quality of Research for Development (QoR4D) in Practice for One CGIAR</a> brief.</li> <li>What are some effective measures or performance metrics to assess the contributions of early-career and mid-career researchers? This evaluation may encompass their publications in high-impact peer-reviewed journals, success in securing grant proposals, development of skills and expertise in their specialized fields, and the practical application, uptake, adoption, and scaling of their research outputs.</li> </ul> |
| <b>Impact: What difference does the intervention make?</b> | <ul style="list-style-type: none"> <li>Has the intervention contributed to transformative change? If drivers of change have been identified in the context analysis under the relevance criterion, under the impact criterion causal relationships between these factors and the intervention can be checked. Consider the different levels where change manifests: individual, societal, institutional and policy.<sup>83</sup></li> <li>Were there differential impacts or unintended effects?<sup>84</sup></li> <li><a href="#">OECD (2023)</a>, <a href="#">GAC (2019)</a>, <a href="#">ILO (2020)</a>, and <a href="#">IOM (2018)</a> provide a list of guiding questions to expand on each of the above questions which are included in <a href="#">Annex 3</a>. OECD also provides suggestions of how to address challenges that arise in assessing impact.</li> </ul>                 |
| <b>Sustainability: Will the benefits last?</b>             | <ul style="list-style-type: none"> <li>Does the intervention build an enabling environment for equity and inclusion? Consider individual, organizational, institutional, and systematic levels.<sup>85</sup></li> <li>Have positive effects been sustained and how? For an intervention to be sustainable, different drivers at different levels must be in place and support each other concurrently.<sup>86</sup></li> <li><a href="#">OECD (2023)</a>, <a href="#">GAC (2019)</a>, <a href="#">ILO (2020)</a>, and <a href="#">IOM (2018)</a> provide a list of guiding questions to expand on each of the above questions which are include in <a href="#">Annex 3</a>. OECD also provides suggestions of how to address challenges that arise in assessing sustainability.</li> </ul>                                                                                                    |

<sup>82</sup> See [2021 Synthesis Report MR](#) for an example of the CGIAR MR.

<sup>83</sup> Ibid.

<sup>84</sup> Ibid.

<sup>85</sup> Ibid.

<sup>86</sup> Ibid.

## Annex 4. Additional Evaluation Questions

| Sub-category                                      | Guiding questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                   | <b>RELEVANCE</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Responding to rights, needs and priorities</b> | <ul style="list-style-type: none"> <li>To what extent were relevant marginalized groups defined/identified by stakeholders themselves?</li> <li>How were relevant marginalized groups involved in the intervention's design? To what extent was the intervention designed in ways that respond to the specific rights, needs and priorities of different relevant marginalized groups?</li> <li>To what extent has the intervention managed diverging needs and priorities? Whose rights, needs and priorities are being met with the intervention?</li> <li>To what extent has the design of the intervention considered multiple forms of discrimination, used available information on intersectionality or conducted an intersectional analysis?</li> <li>To what extent does the intervention explicitly address gender norms and practices and structural barriers to equality? To what extent is the approach of the intervention gender transformative, i.e., based on a critical assessment of gender roles, norms, and dynamics?</li> <li>To what extent does the design of the intervention address power dynamics between different groups of stakeholders?</li> <li>To what extent has the design, monitoring and evaluation system of the intervention included or overlooked marginalized groups?</li> <li>Is the policy/intervention expected to contribute to promoting equality, diversity, and inclusion?</li> <li>Does the policy/intervention respond to the needs of its target population groups? Are there population groups that should be targeted that are not?</li> <li>Does the policy/intervention contribute to, or align with, CGIAR-wide priorities on Gender Equality, Youth, and Social Inclusion (GEYSI)?</li> <li>Does the policy/intervention align with or duplicate the work of other policies, programs or Initiatives? Are there lessons from comparable policies, programs or initiatives that promote equality, diversity, and inclusion that could be applied?</li> <li>Were equity and inclusion principles used (e.g., equality, participation, social transformation, inclusiveness, empowerment) in the design, planning and implementation of the policy/intervention and the results achieved?</li> <li>Was gender integrated into policy/intervention activities, goals and objectives (activities, outputs, outcomes and impacts)? To what extent are the output and outcome indicators of the policy/intervention gender-inclusive?</li> <li>Do the policy/intervention results respond to the needs of all stakeholders identified at the design stage? How have different needs and priorities of different key groups been met?</li> <li>Was a gender-responsive results framework (log frame) used in the policy/intervention design and was implementation consistent? Are gender-responsive indicators appropriate for the given context?</li> <li>Are gender-disaggregated targets set and were gender-disaggregated indicators used?</li> <li>Was the benchmark survey or baseline study gender-sensitive?</li> <li>To what extent was a gender perspective reported on?</li> <li>What effects (expected/unexpected) is the policy/intervention likely to have on power relations between women and men, and on women's empowerment?</li> <li>Were the project's political and implementing partners aware of the policy, program or Initiative's gender-related objectives? Were they sensitized and trained on gender issues?</li> <li>Was technical support sought and received from gender specialists when needed?</li> </ul> |

| Sub-category                                                                     | Guiding questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Being sensitive and responsive to context</b>                                 | <ul style="list-style-type: none"> <li>• Were CGIAR gender guidelines and tools used where available?</li> <li>• Does the policy/intervention have a Monitoring &amp; Evaluation (M&amp;E) system in place that collects sex-disaggregated data and monitors equity and inclusion-related results?</li> <li>• To what extent was the design of the policy/intervention informed by GEYSI-related analysis?</li> <li>• To what extent does the policy/intervention design include measures to address existing or potential conflicts and trauma?</li> <li>• To what extent does it take into consideration gender-based violence (GBV) and other forms of violence relevant to the context?</li> <li>• Is the policy/intervention backed up by a sound risk analysis that is explicit about trade-offs and competing priorities of stakeholders?</li> <li>• To what extent does the M&amp;E system of the intervention include ongoing analysis of unintended effects?</li> <li>• Is the project strategy adapted to the identified needs and capacities of female and male partners and beneficiaries?</li> <li>• Have the assumptions and potential risks about gender roles, norms and relations been included in the project? And how will these factors affect the sustainability of the results?</li> </ul> |
| <b>Evaluation questions to assess the logic model or theory of change (ToC):</b> | <ul style="list-style-type: none"> <li>• Do any aspects of the policy/intervention have potential gender considerations?</li> <li>• Which population groups are expected to contribute to the policy, program or Initiative? What is the role and position of these groups?</li> <li>• Are other identity factors intersecting with gender? Are there other factors (beliefs, prejudices, assumptions) that may create barriers for participation in the policy/intervention by specific gender target groups?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>COHERENCE</b>                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Internal coherence</b>                                                        | <ul style="list-style-type: none"> <li>• To what extent is the policy/intervention and its effects aligned with relevant equity and inclusion laws and policies?</li> <li>• To what extent is the policy/intervention consistent with equity and inclusion policies, strategies, and other interventions in areas other than development co-operation (e.g., foreign policy, humanitarian aid)?</li> <li>• To what extent is the policy/intervention consistent with international and regional equity and inclusion treaties, commitments and conventions?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>External coherence</b>                                                        | <ul style="list-style-type: none"> <li>• Does the policy/intervention support and co-operate with civil society actors representing gender, youth and social inclusion (e.g., human rights organizations, disabled people's organizations, women's rights or feminist organizations)?</li> <li>• To what extent is the policy/intervention consistent with the human rights and gender equality commitments of the relevant stakeholders, and of the institutions or governments involved in the intervention?</li> <li>• Does the policy/intervention create/perpetuate barriers for certain target population groups?</li> <li>• What kind of barriers are perceived by target population groups as a result of the policy, program or Initiative?</li> <li>• In what ways can the policy/intervention be improved to foster inclusion of target population groups (e.g., by enhancing their feedback/contribution)?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>EFFECTIVENESS</b>                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Achievement of objectives</b>                                                 | <ul style="list-style-type: none"> <li>• Did the policy/intervention achieve its gender-related objectives? What kind of progress was made, and what were the obstacles?</li> <li>• Did the policy/intervention communicate effectively its gender-related objectives, results and knowledge?</li> <li>• To what extent has the policy/intervention promoted meaningful participation of stakeholders? To what extent has the policy/intervention supported women's empowerment</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| Sub-category                  | Guiding questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | <p>and facilitated for women to exercise their rights? To what extent has the policy/intervention supported partners to meet their equity and inclusion obligations and commitments?</p> <ul style="list-style-type: none"> <li>To what extent has the policy/intervention supported partners to progressively realize social and economic rights of women, youth and other marginalized groups?</li> <li>To what extent has the policy/intervention worked on discriminatory gender norms and practices and structural barriers to gender equality to achieve its objectives?</li> <li>Did the policy/intervention have any unintended negative effects (e.g., exacerbate discriminatory practices against women and girls)?</li> </ul>                                                                                    |
| <b>EFFICIENCY</b>             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Differential results</b>   | <ul style="list-style-type: none"> <li>Has the policy/intervention achieved inclusive results? Were there differential results for different groups? If so, why and in which way?</li> <li>Do the results of the policy/intervention show that disparities between marginalized groups and other population groups have reduced, increased or stayed the same?</li> <li>Was there sufficient monitoring of differential effects?</li> <li>Are other factors (e.g., age, ethnicity, marital status) intersecting with gender?</li> <li>Are those factors creating barriers for target population groups to participate in the program or to access the service?</li> </ul>                                                                                                                                                   |
| <b>Influencing factors</b>    | <ul style="list-style-type: none"> <li>Which contextual factors might explain observed outcomes?</li> <li>Could these results be achieved in a different context (external validity)?</li> <li>How has the way the policy/intervention was implemented influenced its results?</li> <li>Who was involved in design and implementation, and how did this influence outcomes?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Economic efficiency</b>    | <ul style="list-style-type: none"> <li>To what extent have program managers optimized resources to achieve inclusive and equitable results for all people?</li> <li>Were resources (funds, human resources, time, expertise) allocated strategically to achieve equity and inclusion-related objectives?</li> <li>How many resources were spent on male and on female beneficiaries? How does this compare to the results achieved for men and for women?</li> <li>What are the administrative costs by target population groups? Can administrative efficiency be improved for specific target population groups?</li> <li>Were GEYSI dimensions integrated into the budget planning, budget reporting, and activities implementation?</li> </ul>                                                                          |
| <b>Operational efficiency</b> | <ul style="list-style-type: none"> <li>Was attention given to program implementation resources and disaggregated monitoring with respect to gender equality and women's empowerment goals?</li> <li>Have inclusive budgeting tools been used?</li> <li>Have proper resources been allocated to integrate GEYSI in the intervention? If so, how was the implementation process managed, did it lead to more inclusive results? What were the costs and time implications?</li> <li>Did the project make strategic and efficient use of external social inclusion expertise (e.g., consultants) when needed?</li> <li>How effective and efficient are means to ensure inclusion of target population groups in the intervention?</li> <li>Was a social inclusion perspective reflected in the delivery of outputs?</li> </ul> |
| <b>IMPACT</b>                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Significance</b>           | <ul style="list-style-type: none"> <li>What were the project's achievements in terms of promoting gender equality and women's empowerment, including intersectionality issues? Were there changes made in: (1) women's access to resources, sources of income, assets (including land) and services; (2) women's influence and decision-making within the household and community; (3) workload distribution (including domestic chores); and (4) women's health, skills, and nutrition?</li> <li>Has the policy/intervention generated systemic changes in the lives of rights-holders? To what extent are rights-holders, particularly diverse groups of women, youth and marginalized</li> </ul>                                                                                                                         |

| Sub-category                             | Guiding questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                          | <p>groups, able to enjoy and claim their rights? Does their immediate environment enable and empower them to do so?</p> <ul style="list-style-type: none"> <li>Has the policy/intervention helped to overcome discrimination that negatively affects segments of the population?</li> <li>To what extent did the policy/intervention have an impact on the representation and meaningful participation of women, youth and marginalized rights-holders in decision-making processes? To what extent did the policy/intervention have an impact on accessibility to assets and resources for diverse groups of women, youth and people from marginalized groups?</li> <li>What were the GEYSI objectives achieved and mainstreaming principles adhered to by the intervention?</li> <li>To what extent has the inclusion of GEYSI issues led to better quality results? (outcome and impact)?</li> <li>To what extent will/could a gender-sensitive approach lead to an improved impact of the project?</li> <li>What were the benefits and opportunities of taking gender, youth and social inclusion into consideration?</li> <li>What were the GEYSI objectives achieved (or likely to be achieved) and mainstreaming principles adhered to by the intervention?</li> </ul> |
| <b>Differential impact</b>               | <ul style="list-style-type: none"> <li>Were there equal or differential impacts for different groups of stakeholders? If so, why did these differential impacts occur?</li> <li>Were there any gender-related differences in impacts? If and how did gender-related impacts intersect with impacts on other forms of discrimination?</li> <li>To what extent and in what ways have expected outcomes had an impact on different population groups? Have outcomes differed across different population groups?</li> <li>To what extent have any disparities in outcomes for different population groups been addressed, if necessary? Were the results achieved equitably distributed among the targeted stakeholder groups?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Unintended effects</b>                | <ul style="list-style-type: none"> <li>Did the intervention have any unexpected negative effects for any population groups (i.e., accentuate discrimination and exclusion patterns)? If so, how were these addressed, if at all?</li> <li>Did the intervention have any unexpected positive effects?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>SUSTAINABILITY</b>                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Transformational change</b>           | <ul style="list-style-type: none"> <li>Were there notable changes in social norms, attitudes, behaviors and beliefs and policies/laws relating to gender equality?</li> <li>Is the policy/intervention as set out currently gender-transformative? Has gender awareness increased among targeted population groups? Have internal representatives and target population groups learned about relevant gender considerations because of intervention activities?</li> <li>To what extent has the policy/intervention helped to change social and gendered norms and attitudes that negatively impact equity and inclusion?</li> <li>Has the policy/intervention engaged with societal power dynamics?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Building and enabling environment</b> | <ul style="list-style-type: none"> <li>Has the policy/intervention contributed to enduring changes in laws, social norms and values, attitudes, and behaviors towards those from the most marginalized groups?</li> <li>Can these achievements and changes be sustained over a long period? Is there wide acceptance in communities, partner institutions, social and religious institutions of these changes and of equity and inclusion norms?</li> <li>Did the policy/intervention have a leveraging effect on creating an enabling environment for the continuous promotion and realization of gender equality and human rights?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Sub-category                            | Guiding questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                         | <ul style="list-style-type: none"> <li>To what extent has the policy/intervention contributed to societal discourse conducive to the exercise of human rights and gender equality?</li> <li>Do the policy/intervention results still respond to the needs of all stakeholders as previously identified at the design stage?</li> <li>What are the assumptions about gender roles, norms and relations that supported or hindered the policy, program or initiative? How will these factors affect the sustainability of the results?</li> </ul>                                                                                                                                                                                      |
| <b>Continuation of positive effects</b> | <ul style="list-style-type: none"> <li>Has the policy/intervention helped to generate stable and long-lasting accountability and participation mechanisms for people from marginalized groups? Can these achievements be sustained over time?</li> <li>Which modalities, instruments and mechanisms are appropriate to sustain equity and inclusion strategies and approaches over a long time?</li> <li>What are the possible long-term effects on gender equality and social inclusion?</li> <li>Are any results related to equity and inclusion likely to be sustained? Is the level of stakeholder ownership sufficiently gender-sensitive or gender-specific to allow for project outcomes/benefits to be sustained?</li> </ul> |
| <b>Risks and potential trade-offs</b>   | <ul style="list-style-type: none"> <li>Are there factors that risk jeopardizing the continuous realization of gender equality and human rights?</li> <li>Did the policy/intervention have a well-planned exit-strategy to mitigate risks of backsliding?</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## Annex 5. Evaluation Tips and Resources

| Tips and resources                  | Integrating Gender, Youth and Social Inclusion (GEYSI) considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Integrating Gender, Diversity and Inclusion (GDI) considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Preparation and scoping</b>      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Evaluability Assessment (EA)</b> | <p>To what extent a Research Portfolio has gender, youth and/or social inclusion explicitly addressed in the objectives, theory of change (ToC), theory of action and/or program design and existing data.</p> <p><a href="#">CGIAR</a> provides guidance on conducting EAs, and the <a href="#">Food and Agriculture Organization (FAO) Guidelines for the Assessment of Gender Mainstreaming</a> (p. 5) and <a href="#">UN Women's guidelines for How to Manage Gender-Responsive Evaluations</a> (p. 121) provide specific guidance on how to conduct an EA on gender.</p> | <p>The evaluation team will need to discuss how diversity and inclusion were defined, if they were, what the expectations were for diversity and inclusion, and how these relate to the specific entity being evaluated. For example, if there are few women staff compared to men staff (looking at gender parity), or few locally based researchers compared to international researchers (which looks at both diversity and inclusion) the evaluation can explore the reasons for these quantitative results.</p> |

| Tips and resources                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Integrating Gender, Youth and Social Inclusion (GEYSI) considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Integrating Gender, Diversity and Inclusion (GDI) considerations                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Stakeholder analysis and engagement</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>Step 1: Identify diverse stakeholders.</p> <p>Step 2: Ensure authentic engagement.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Same.                                                                                                   |
| <p>The <a href="#">World Food Programme (WFP)</a> provides useful guidance on gender-sensitive stakeholder analysis. The <a href="#">Government of South Africa's guidelines</a> list diversity and inclusion considerations for identifying relevant stakeholder groups. UN Women's Evaluation Office also provides comprehensive <a href="#">guidelines</a> (p. 40) as well as a template (p. 139). United Nations Evaluation Group (UNEG) guidance to determine the degree of stakeholder participation (p. 21) and a stakeholder evaluation matrix (p. 23) are also useful.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                         |
| <b>Evaluation criteria and questions</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | All seven evaluation criteria are not always used. Examples of how to incorporate gender, youth and social inclusion are provided.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Around outcomes including Inclusive Leadership, Inclusive Workplace Culture and Diverse Representation. |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <p><a href="#">FAO's Guidelines for the assessment of gender mainstreaming</a> include specific questions to evaluate specific gender quality objectives (e.g., decision-making, control over resources, access to resources, work burden, budget allocation). The <a href="#">European Institute for Gender Equality (EIGE) Guide to Gender Impact Assessment</a> provides examples of specific questions and areas of evaluation for government policies, laws and programs. The <a href="#">South African M&amp;E Association (SAMEA)</a> provides core evaluation questions for gender transformative evaluations. The <a href="#">International Organization for Migration (IOM) Guidance for Addressing Gender in Evaluations</a> has specific questions to assess gender within evaluation reports. The Organization for Economic Cooperation and Development (OECD) <a href="#">Applying Evaluation Criteria Thoughtfully</a> provides additional guidance on six of the seven evaluation criteria, but excludes quality of science (QoS). <a href="#">Global Affairs Canada (GAC) (2019)</a> provides guidance for all criteria excluding QoS; <a href="#">IOM (2018)</a>, <a href="#">International Labour Organization (ILO) (2020)</a>, and <a href="#">OECD (2023)</a> also provide gender and inclusion-related questions. Questions for QoS can be found in the <a href="#">Quality of Research for Development in Practice for One CGIAR</a> brief.</p> |                                                                                                         |
| <b>Evaluation approaches</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p>A good gender approach includes an awareness of intersectionality, meaning that age, culture, education level, marital status, and other differences are addressed. Therefore, while the guidance is on gender, it naturally includes youth and social inclusion.</p> <p>All CGIAR evaluations should be gender responsive, gender transformative, or informed by feminist evaluation thinking.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | If GDI is a primary focus of the evaluation, a feminist approach may be required. Otherwise, N/A.       |
| <b>Terms of Reference (ToR)</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Checklist for each of the ToR sections (evaluation scope, evaluation design, stakeholder participation, evaluation team and ethical code of conduct).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | A GDI focus needs to be included in the ToR to ensure that GDI is addressed.                            |

| Tips and resources                   | Integrating Gender, Youth and Social Inclusion (GEYSI) considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Integrating Gender, Diversity and Inclusion (GDI) considerations                                                                                                                       |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                      | <a href="#">UN Women's Independent Evaluation Office</a> provides an evaluation ToRs outline with description of what information should be included for each component (p. 47) and a ToR template (p. 128).                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                        |
| Evaluation team                      | When evaluating gender, youth and social inclusion and or GDI, related gender and social inclusion expertise, facilitation skills and experience in using participatory evaluation methods is required. Evaluators should have strong facilitation skills to help surface, explore, and diffuse potentially sensitive situations around the gender norms influencing the attitudes and behaviors of girls and boys, and men and women. Quantitative data experts should be familiar with how to incorporate gender, youth and social inclusion into quantitative methods and approaches. |                                                                                                                                                                                        |
| Conducting the evaluation            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                        |
| Inception phase and inception report | Box 5 provides questions that can be used to both guide and assess how and if an Inception Report addresses gender equity, youth and social inclusion.                                                                                                                                                                                                                                                                                                                                                                                                                                   | Same.                                                                                                                                                                                  |
|                                      | <a href="#">UNICEF</a> and <a href="#">IOM</a> provide guidance on integrating gender, youth and social inclusion in the inception report. Additionally, the <a href="#">SAMEA</a> provides guidance on how different methods can be used to explore transformative equity aspects.                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                        |
| Evaluation questions                 | See 5.1.3.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Same.                                                                                                                                                                                  |
| Evaluation approaches                | See 5.1.4.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | See 6.1.5                                                                                                                                                                              |
| Data collection                      | Identify what data should and can be collected by gender, sex, and/or other disaggregation (e.g., age, location) and how, by whom, when and where the data collection will take place. An appropriate mix of methods should be used to gather data to offer diverse perspectives and promote participation of diverse groups of stakeholders.                                                                                                                                                                                                                                            |                                                                                                                                                                                        |
| Data analysis                        | Data collected should be disaggregated along lines of sex, gender identify, age, education, geographical location, poverty, ethnicity, indigeneity, and disability. Attention should be given to trends, patterns, and differences among the diverse groups and these voices appropriately represented. Various perspectives should be included in the data analysis process.                                                                                                                                                                                                            | Same. Themes including trends in CGIAR's GDI, data use, gender, diversity, inclusion, leadership, safe and respectful workplace, and engagement with GDI may be particularly relevant. |
|                                      | Both the <a href="#">FAQ</a> (p. 16) and <a href="#">EIGE</a> (p. 17) provide sample outlines for evaluation reports. Additionally, the <a href="#">Government of South Africa</a> lists questions the evaluation team can ask during the analysis process which focus on a gender transformative approach. The World Bank's guidelines for <a href="#">Integrating Gender into Independent Evaluation Group (IEG) Work</a> provides a gender resource                                                                                                                                   |                                                                                                                                                                                        |

| Tips and resources                                | Integrating Gender, Youth and Social Inclusion (GEYSI) considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Integrating Gender, Diversity and Inclusion (GDI) considerations |
|---------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
|                                                   | database with the descriptions and link to external resources (datasets, toolkits) to use for gender analysis.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                  |
| <b>Validation of findings and recommendations</b> | A validation plan provides a process for how evaluation findings are validated and specifies that stakeholders who are familiar with, or who form a part of any unit/group related to, gender, youth, and social inclusion need to be included. See a designated Management Engagement and Response <a href="#">Hub</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                  |
| <b>Report and dissemination of findings</b>       | <p>Interweaving gender, youth and social inclusion into the final report can be done in various ways, from synthesizing the findings into the overall findings, comparing the findings to the more general findings, and/or providing a specific space in the report (e.g., text boxes), or all the above. Recommendations are a critical component of CGIAR process and performance evaluation reports. Recommendations are presented to and reviewed by CGIAR management and receive a response.</p> <p>The <a href="#">2021 Synthesis Report</a>, the <a href="#">2020 WHEAT Review</a>, the <a href="#">GENDER Impact Platform Evaluation</a>, the <a href="#">2017 Evaluation of Gender in Research and in CGIAR Workplace</a> and the <a href="#">CGIAR Research Program (CRP) 2020 Reviews: Climate Change, Agriculture and Food Security</a>, all provide examples of GEYSI and GDI related recommendations. Inclusion of lessons learned is also valuable given many CGIAR process and performance evaluations seek to provide real-time feedback to contribute to CGIAR's institutional learning. The <a href="#">2020 Evaluation Synthesis of Gender Mainstreaming at the African Development Bank</a> provides a useful example in this regard.</p> |                                                                  |
| <b>Management Response (MR) and action plan</b>   | Where Gender, youth and social inclusion-related evaluation recommendations are produced, representation of the responsible unit(s) is mandatory in developing a MR. CGIAR tracks implementation of recommendations in the <a href="#">MR Actions Tracker</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                  |

## Annex 6. GEYSI and GDI Evaluation Resources and References

| INTERNAL REFERENCES |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CGIAR Background    | <a href="#">2030 CGIAR Research and Innovation Strategy</a><br><a href="#">CGIAR 2022–30 Performance and Results Management Framework (PRMF)</a><br><a href="#">CGIAR Evaluation Policy</a><br><a href="#">CGIAR Evaluation Framework</a><br><a href="#">GENDER Impact Platform</a><br><a href="#">22nd CGIAR System Council Meeting (SC22). (2025). GDI now re-framed to C&amp;E.</a>                                                                                           |
| Strategy            | <a href="#">Genetic Innovation Gender Strategy</a><br><a href="#">Resilient Aquatic Foods Initiative</a><br><a href="#">Initiative on Fragility to Resilience in Central and West Asia and North Africa</a> Gender Strategy<br><a href="#">International Water Management Institute</a> Gender <a href="#">Strategy</a><br><a href="#">GDI Action Workplace Plan (2023–24)</a><br><a href="#">Framework for Gender, Diversity, and Inclusion in CGIAR's Workplaces (2020–22)</a> |

[Gender Equality, Climate Change and Agriculture in the MENA region: Priorities and Possibilities](#)

|                                                 |                                                                                                                       |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Useful documents for Specific Evaluation Phases |                                                                                                                       |
| EA                                              | <a href="#">Conducting and Using Evaluability Assessments in CGIAR: CGIAR Evaluation Guidelines</a> (also in Spanish) |
| Terms of Reference                              | <a href="#">Terms of Reference: CGIAR Science Group Evaluations</a>                                                   |
| Inception Reports                               | <a href="#">CGIAR GENDER Platform Evaluation: Inception Report</a> (see p. 52)                                        |
| Reports                                         | Data and Data Collection Tools                                                                                        |
|                                                 | <a href="#">CGIAR Result Dashboard</a>                                                                                |
|                                                 | <a href="#">GDI Dashboard</a>                                                                                         |
|                                                 | <a href="#">CGIAR Workforce Data Dashboard</a>                                                                        |
|                                                 | <a href="#">CGIAR Annual Reports</a>                                                                                  |
|                                                 | <a href="#">Women's Empowerment in Agriculture Index</a>                                                              |
|                                                 | <a href="#">Women's Empowerment in Livestock Index</a>                                                                |
|                                                 | <a href="#">Women's Empowerment in Fisheries Index</a>                                                                |
|                                                 | <a href="#">Market Inclusion</a>                                                                                      |
|                                                 | CGIAR Evaluation Reports                                                                                              |
|                                                 | <a href="#">2017 Evaluation of Gender in Research and in CGIAR Workplace</a>                                          |
|                                                 | <a href="#">2021 Synthesis Report</a>                                                                                 |
|                                                 | <a href="#">2020 WHEAT Review</a>                                                                                     |
|                                                 | <a href="#">GENDER Impact Platform Evaluation</a>                                                                     |
|                                                 | <a href="#">CRP 2020 Reviews: Climate Change, Agriculture and Food Security</a>                                       |
|                                                 | <a href="#">2021 Monitoring, Evaluation, Learning and Impact Assessment (MELIA) Glossary (version 5)</a>              |

## EXTERNAL REFERENCES

|                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Other                | <ul style="list-style-type: none"> <li>• <a href="#">2020 Evaluation Synthesis of Gender Mainstreaming at the African Development Bank</a></li> <li>• <a href="#">Thematic evaluation of IFAD's support to gender equality and women's empowerment</a></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Management Response  | <ul style="list-style-type: none"> <li>• <a href="#">2021 Synthesis Report Management Response</a></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Consulted Guidelines | <ul style="list-style-type: none"> <li>• <a href="#">European Institute for Gender Equality. (n.d.). Guide to Gender Impact Assessment</a></li> <li>• <a href="#">Global Affairs Canada (GAC) 2019 Integrating Gender-Based Analysis Plus into Evaluations A Primer</a></li> <li>• <a href="#">Organization for Economic Co-Operation and Development (OECD) 2023 Applying a Human Rights and Gender Equality Lens to the OECD Evaluation Criteria, Best Practices in Development Co-operation</a></li> <li>• <a href="#">Independent Advisory and Evaluation Services (IAES) 2021 Quality of Research for Development Practice for One CGIAR</a></li> <li>• <a href="#">International Development Research Center (IDRC) Guide to Integrating Gender in your Proposal</a></li> <li>• <a href="#">International Fund for Agricultural Development (IFAD) 2022 IFAD Evaluation Manual: Part I</a></li> <li>• <a href="#">International Labor Organization (ILO) 2007 Equality at Work: Tackling the Challenges</a></li> <li>• <a href="#">ILO 2020 Guidance Note 3.1: Integrating Gender Equality in Monitoring and Evaluation</a></li> <li>• <a href="#">International Organization for Migration (IOM) 2018 Guidance for Addressing Gender in Evaluations</a></li> <li>• <a href="#">South African M&amp;E Association (SAMEA) 2022 Evaluation Guidelines No 2.2.2: Integrating a Transformative Equity Criterion into Evaluations for Promoting Transformative Systematic Change</a></li> <li>• <a href="#">United Nations Evaluation Group (UNEG) 2011 Integrating Human Rights and Gender Equality in Evaluation – Towards UNEG Guidance. United Nations Office for Project Services (UNOPS) Gender, Diversity and Inclusion in our Workforce: Strategy 2022-25</a></li> <li>• <a href="#">UN Women 2020 Good Practice in Gender Responsive Evaluations</a></li> <li>• <a href="#">UN Women Independent Evaluation Office 2015 How to Manage Gender-Responsive Evaluation: Evaluation Handbook</a></li> <li>• <a href="#">World Food Programme (WFP). N.d. Gender &amp; Stakeholder Analysis. Rome: WFP Gender Office</a></li> </ul> |

Other  
referenced  
documents

- SPARK, [Diversity and Inclusion: What's the difference and how can we ensure both?](#)



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