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TIPS FOR INTEGRATING GENDER INTO USAID EDUCATION SECTOR SOLICITATIONS



OCTOBER 2010

This document is an updated version of *Tips for Gender Integration in USAID Education Sector Solicitations*, which was developed by Management Systems International under the EQUATE: Achieving Equality in Education project (Contract # GEW-I-00-02-00021-00, Task Order #1).

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Top Right: Nicholas Griffin/DevTech, Inc.; outdoor schoolroom, post-earthquake, Balakot, Pakistan

Bottom Right: Nicholas Griffin/ DevTech Systems, Inc.; Head Master and teacher in rural school, Kaolack, Senegal

Bottom Left: Phil Church/DevTech Systems, Inc.; Municipal Plaza, Guatemala

Back Cover: Nicholas Griffin/DevTech, Inc.; temporary classroom outside post-earthquake Muzaffarabad, Pakistan

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ABBREVIATIONS

ADS	Automated Directives System
AO	Agreement Officer
AO	Assistance objective
APS	Annual Program Statement
CO	Contracting Officer
CoP	Chief of Party
DAC	Development Assistance Committee
M&E	Monitoring and evaluation
OECD	Organisation for Economic Co-operation and Development
PD	Program description
RFA	Request for Application
RFP	Request for Proposal
SOW	Scope of work
SOW	Statement of work
TEC	Technical evaluation committee
USAID	U.S. Agency for International Development

GLOSSARY

Applicants refer to entities submitting responses to Requests for Applications (RFAs) and Annual Program Statements (APSS).

Gender is a social construct that refers to relations between and among the sexes, based on their relative roles. It encompasses the economic, political, and socio-cultural attributes, constraints, and opportunities associated with being male or female. As a social construct, gender varies across cultures, is dynamic, and open to change over time. Because of the variation in gender across cultures and over time, gender roles should not be assumed but investigated. Note that “gender” is not interchangeable with “women” or “sex.”

Gender dynamics refer to the relationships and interactions between and among boys, girls, women, and men. Gender dynamics are informed by socio-cultural ideas about gender and the power relationships that define them. Depending upon how they are manifested, gender dynamics can reinforce or challenge existing norms.

Gender equality is a broad concept and a goal for development. It is achieved when men and women have equal rights, freedoms, conditions, and opportunities for realizing their full potential and for contributing to and benefiting from economic, social, cultural, and political development. It means society values men and women equally for their similarities and differences and the diverse roles they play. It signifies the outcomes that result from gender equity strategies and processes.

Gender equity is the process of being fair to women and men. To ensure fairness, measures must often be available to compensate for historical and social disadvantages that prevent women and men from otherwise operating on a level playing field. Equity leads to equality.

Gender integration refers to the process of identifying and then addressing gender differences and inequalities during program and project design, implementation, monitoring, and evaluation.

Offerors refer to entities submitting responses to Requests for Proposals (RFPs) and Requests for Task Order Proposals (RFTOPs).

Parity in education refers to equivalent percentages of boys/men and girls/women (relative to the population per age group) in an education system. Parity is essential but not sufficient for achieving gender equality.

Procurement instruments include contracts, grants, or cooperative agreements, which are used to procure either goods or services (contracts) or provide financial support to the programs of non-governmental organizations (grants and cooperative agreements).

Sex is a biological construct that defines males and females according to physical characteristics and reproductive capabilities. Gender and sex are not synonyms.

Solicitation refers to the assorted means by which offers or proposals are sought for government requirements and programs. These include Requests for Proposals, Requests for Applications, Requests for Task Order Proposals, and Annual Program Statements, which are referred to collectively throughout this guide as solicitations.

INTRODUCTION

“Gender issues are central to the achievement of strategic plans and Assistance Objectives (AO) and USAID strives to promote gender equality, in which both men and women have equal opportunity to benefit from and contribute to economic, social, cultural, and political development; enjoy socially valued resources and rewards; and realize their human rights.”

USAID ADS 201.3.9.3

Development programming that addresses gender concerns is more effective, responsive, and sustainable. Within the context of education, this means that more boys and girls are able to attend school, receive a higher quality education, improve their educational outcomes, and maximize their potential. Education plays a crucial role in development, improving economic growth, and reducing poverty. Educating girls, in particular, leads to many additional social benefits, including reduced fertility, healthier children, greater political participation, increased economic productivity for women, and a reduction in the prevalence of domestic violence, HIV, and AIDS. While development funding for education already achieves a high yield on the investment, integrating gender issues into education programming helps ensure access to a better quality education for all.

Enabling boys and girls to fully realize the benefits of education necessitates an understanding of their differing roles, needs, and responsibilities. Identifying how gender norms, relations, and power dynamics influence educational opportunities for boys and girls enables education officers to design solicitations that elicit targeted responses to existing needs and problems. By integrating gender issues into solicitations, education officers can ensure that proposed activities address the root causes of problems and overcome the barriers and constraints to education for boys and girls. *Tips for Integrating Gender Into USAID Education Sector Solicitations* provides education officers with a systematic way of ensuring that gender issues are comprehensively addressed in the solicitation and during the technical evaluation process.

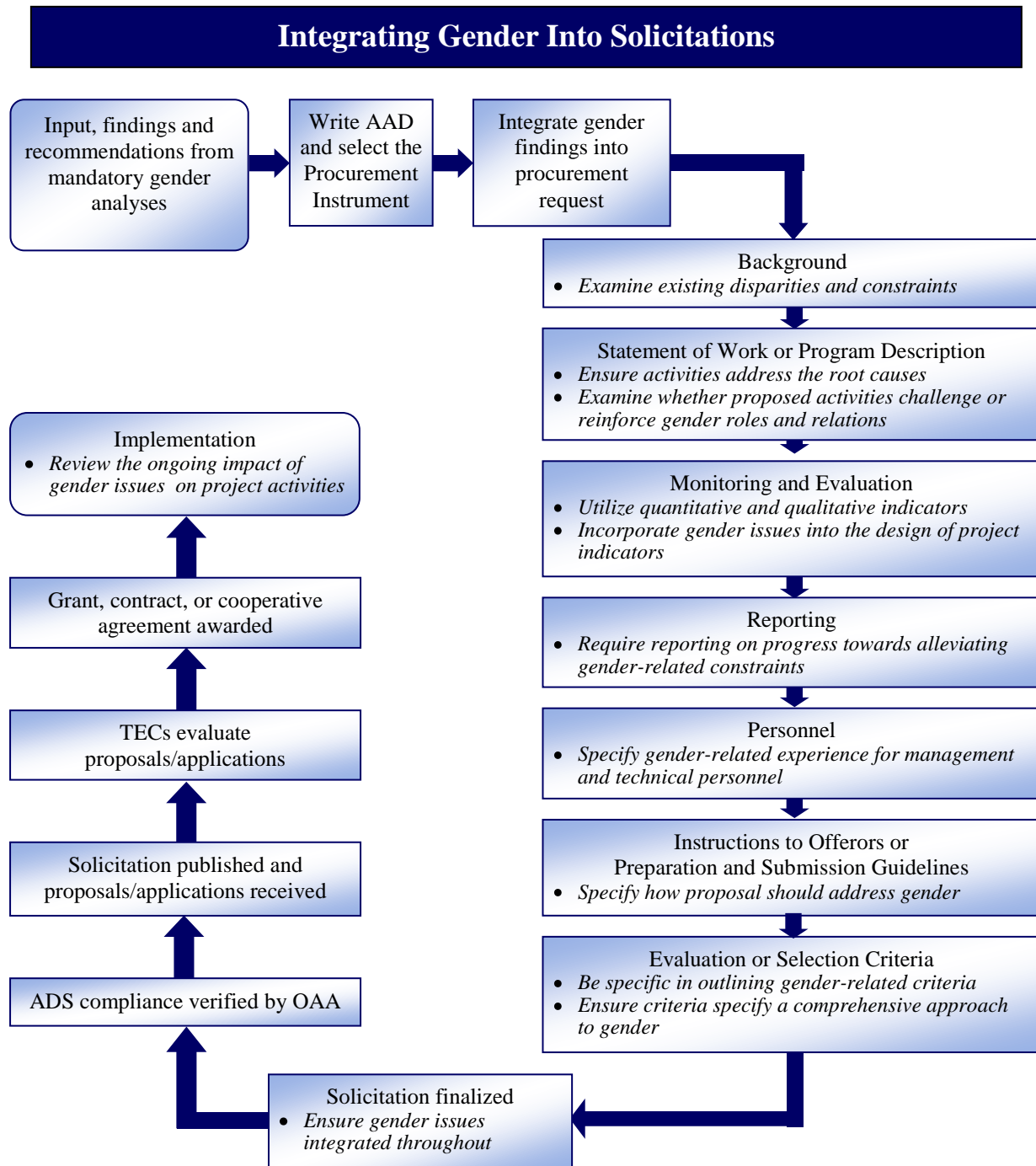
ABOUT THIS GUIDE

This guide is designed to help USAID education officers better incorporate gender issues into solicitations and their technical evaluation. It is not an exhaustive presentation of the myriad gender issues that may impact a given project. It is not intended to cover all questions an education officer might have, nor is it intended to be applied verbatim as a template. The level of specificity and types of information included in the procurement document depends on the type of instrument selected and is context specific.

The guide is divided into three sections: USAID programming requirements for integrating gender into solicitations, guidelines for developing solicitations, and guidelines for reviewing proposals/applications. Figure 1 on the next page illustrates the overall process of integrating gender issues into solicitations.

For additional technical support, or for clarification on any elements of this guide, please contact the Office of Women in Development or your USAID Mission or Bureau gender specialist.

FIGURE I. INTEGRATING GENDER INTO SOLICITATIONS



USAID PROGRAMMING REQUIREMENTS FOR INTEGRATING GENDER INTO SOLICITATIONS

The solicitation documents for both contracts and grants/cooperative agreements/Annual Program Statements (APSs) have similar requirements for addressing gender issues, which are found in the Automated Directives System (ADS). The ADS defines staff roles and responsibilities so that employees can achieve the Agency’s development goals, consistent with applicable rules, sound policy principles, and management practices. Integrating gender into solicitations is guided by [ADS 201.3.11.6](#), [ADS 302.3.5.15](#) (for contracts), and [ADS 303.3.6.3](#) (for grants and cooperative agreements).

Terminology used in the ADS varies according to whether the procurement request is acquisition or assistance. The chart below illustrates the key sections in which gender issues must be integrated into Requests for Proposals (RFPs) and Requests for Task Order Proposals (RFTOPs) for contract awards or Requests for Applications (RFAs) and APSs for assistance awards.

Table: Components of Acquisition and Assistance Instruments in Which Gender Must Be Integrated¹

Acquisition (RFPs and RFTOPs)	Assistance (RFAs and APSs)
Description/specifications/statement of work (Section C of the RFP): There is no standard format but usually contains sections on background, title, objectives, scope of work, implementation and management plan, and performance monitoring plan.	Program Description: There is no standard format, but usually contains background, plans for achieving results, description of activities deemed essential to achieve planned results, and plans for monitoring and evaluation.
Instructions, conditions, and notices to offerors or respondents (Section L of the RFP): technical approach and personnel.	Instructions to Applicants/Application and Submission Information: There is no standard title for this section.
Evaluation factors for award (Section M of the RFP): technical proposal evaluation criteria.	Selection Criteria: There is no standard title for this section.

ADS 201.3.11.6 indicates that a gender analysis is mandatory before the approval of individual projects or activities. The findings of the analytical work performed during the development of a project or activity design must be integrated into the Statement of Work/requirements definition or the Program Description when the project or activity is to be implemented through an acquisition or assistance award. This will better ensure that as contractors or recipients implement the project or activity, the gender issues identified through the analysis are not overlooked, sidelined, or marginalized. Once gender issues are fully integrated into a contract Statement of Work or the Program Description for a grant/cooperative agreement, they are an integral part of the evaluation/selection process for any solicitations financed under the project or activity.

Assistance Objective (AO) Teams must ensure that potential implementers are capable of addressing the gender concerns identified in solicitations. This is done by including performance requirements regarding gender expertise and capacity in the solicitations, tasking offerors and applicants with

¹ However, if the AO Team determines that gender is not an issue and includes the rationale as part of the Activity Approval Document, it must provide the approved rationale to the Contracting Officer or the Agreement Officer as part of the procurement request documentation for an acquisition or assistance award.

proposing meaningful approaches to address identified gender issues, and reflecting these performance requirements in technical evaluation and selection criteria.

Below is a summary of the ADS guidance on contracts (ADS 302.3.5.15) and grants (ADS 303.3.6.3):

- The Contract or Agreement Officer must ensure that the requiring office integrates gender issues in the procurement request or includes a rationale for not addressing gender in the project or activity.
- Gender issues must be integrated in the different performance components of an RFP (e.g., Statement of Work, project deliverables, key personnel qualifications, monitoring and evaluation requirements), or an RFA (e.g., Program Description, key personnel qualifications, monitoring and evaluation requirements).
- The Contract or Agreement Officer must ensure that once gender has been integrated into the solicitation contract performance components, gender is also reflected in the corresponding technical evaluation criteria for RFPs or technical selection criteria for RFAs or APSs. These technical criteria include, but are not limited to, technical understanding and approach, monitoring and evaluation, and personnel.

GUIDELINES FOR DEVELOPING SOLICITATIONS

Addressing the key points outlined in each of the sections of this guide will ensure that gender issues are integrated throughout the solicitation. In addition to the section-specific points, there are a number of general considerations that education officers are encouraged to keep in mind when writing the procurement request.

General Considerations

- Include sex-disaggregated information to provide a clearer understanding of the context and any existing disparities.
- Expand the examination of gender issues beyond the individual level (e.g., student enrollment ratios or transition rates) to examine gender implications at the institutional and political levels (e.g., low salaries creating a disincentive for men becoming teachers or policies barring pregnant girls from attending school).
- Avoid including an all-encompassing, one-sentence statement regarding the importance of considering gender (e.g., offeror/applicant should address gender in designing project activities). To ensure gender issues are adequately addressed in proposals/applications, these considerations should be incorporated throughout the solicitation (background, scope of work, M&E requirements, personnel, etc.).
- Be careful not to equate gender concerns with an exclusive focus on girls or women. Gender refers to the qualities and behaviors expected from men and women² – what is defined by society as “masculine” or “feminine” traits or roles. An attention to gender involves examining the roles, relationships, and dynamics between men and women and how these impact their needs, what they do and how they spend their time, their access to resources, their ability to participate and make decisions, and the power relations between them.

² Implicit in references to men and women are boys and girls.

Background and Objectives

Purpose

Integrating gender issues into the background and objectives sections allows education officers to set the tone for the solicitation and for the design and implementation of project activities. These sections provide the overall context in which project activities will take place, including information on historical trends and the political, social, and educational context.

Addressing gender in the solicitation and in the project design begins with the information presented in the background section. This is where the findings from the mandatory gender analysis conducted during the project/activity planning stages, which must be integrated into the Statement of Work or Program Description, could be included. Incorporating information on the gender-related constraints and opportunities in the education sector provides the contextual information offerors/applicants need to develop a comprehensive response. It also provides them with a greater understanding of the causes of the problems the project is intended to address. Identifying these causes enables education officers to develop project objectives specific to meeting the recognized needs. Education officers are able to outline the desired changes, making it clear to offerors/applicants what needs to be addressed to achieve the specified results. The more complete the gender-related information presented in these sections, the better offerors/applicants will be able to respond to the identified needs and constraints.

Example

Before:

“In implementing educational reforms... one systemic deficiency that continually crops up is the lack of valid and reliable educational data to inform resource allocation, efficient school management, and policy making at various levels. This absence of a user-friendly system for monitoring and evaluating educational outcomes presents a challenge to achieving higher quality across the board.

The implementation of an evaluation and monitoring system offers an entry point to reorient education towards improved teaching and learning.”

After:

In implementing educational reforms, one systemic deficiency that continually crops up is the lack of valid and reliable educational data to inform resource allocation, efficient school management, and policy making at various levels. This absence of a user-friendly system for monitoring and evaluating educational outcomes presents a challenge to achieving higher quality across the board. *Existing data collection mechanisms do not produce adequate information on disparities in educational access, quality, and achievement between boys and girls. Limited data collection techniques in the existing system make it difficult to collect sex-disaggregated data. In addition to questions of validity and reliability in the existing system, further gaps in the system revolve around the selection of data to collect. Current data collection efforts focus primarily on issues of access and retention, but are insufficient for assessing improvements in educational quality or achievement.*

The implementation of a redesigned evaluation and monitoring system offers an entry point to reorient education towards improved teaching and learning. *The redesign process provides a unique opportunity to incorporate data collection elements that will provide a richer understanding of existing disparities and the impact of educational reforms on boys*

and girls.

Explanation:

The revised background information provides a more complete picture of the existing system and its limitations. It highlights gaps in the information that is currently available, indicating specific components that will need to be addressed in the redesigned system. This version also draws attention to the importance of addressing issues of educational access, quality, and achievement, which are essential for ensuring gender equality in education. In addition to providing more contextual information on the existing system, the revised version acknowledges the importance of considering the differential impact of education activities on boys and girls.

Key Points

- Set the stage for the importance of addressing gender equality issues in education by introducing specific information on existing disparities and the differing needs of men and women engaged in the project, such as retention or achievement rates. The mandatory gender analysis conducted during the planning phase for the proposed project activity is a key source of information as well as past Agency and development partner experience, including Agency policy documents, alternative development approaches, best practices, evaluations, and other development literature in designing activities.
- Expand the discussion of gender issues beyond the individual level by examining gender implications at the institutional and policy levels, e.g., policies that prohibit pregnant students from attending school or an under-representation of women in decision-making positions in the school.
- Balance quantitative information, such as sex-disaggregated statistics, with qualitative information that contextualizes the data and provides a more nuanced understanding of the context.
- Incorporate gender issues into project objectives to ensure that they are addressed by offerors/applicants. For example, a project to address achievement disparities might state that one objective is to address the gender stereotypes that limit boys' interest in reading and girls' engagement with science.

Scope of Work or Description of Activities

Purpose

Integrating gender issues into the scope of work or description of activities sections of the solicitation ensures that the activities and program approaches proposed by offerors/applicants are designed to address the gender-related gaps, disparities, and constraints outlined in the background section. While the background and objectives sections of the solicitation provide the context and overall purpose of the intended project, the scope of work and description of activities sections elaborate on the activities and approach to be undertaken during the project. A high level of specificity when outlining the program approach or illustrative activities can provide offerors/applicants with the information needed to develop a targeted response.

Considering the different responsibilities, needs, and interests of men and women when developing the scope of work/description of activities will enable offerors/applicants to develop approaches that are responsive to the needs of communities and host country partners. It will help ensure that proposed activities do not perpetuate existing stereotypes, but that they seek to transform inequitable gender

dynamics that limit educational outcomes for boys and girls. A scope of work or description of activities that incorporates an understanding of how men and women are differently engaged in and benefiting from the proposed intervention will help education officers ensure that project activities achieve their desired results.

Example

Before:

“Illustrative activities:

- Establishing Mothers’ of Students Associations.
- Sensitizing local authorities and opinion leaders on the importance of girls’ schooling

After:

Illustrative activities:

- Establish mothers’ *committees and fathers’ committees within the parents’ associations to promote the active engagement of both parents. Promote leadership skills in the mothers’ committees to provide mothers with the opportunity to voice their opinions on the management of the education system. Encourage fathers to become more active in assisting their children with learning in the home and in promoting the importance of education. Establish report-back mechanisms to encourage exchange of information between mothers’ and fathers’ committees within parents’ associations.*
- Sensitize local authorities and opinion leaders on the importance of educational achievement for boys and girls.

Explanation:

The revised version highlights the importance of engaging both mothers and fathers in children’s education. The goal of the mothers’ associations in the before example is to enhance women’s participation in parents’ associations, where they have been historically underrepresented in this country. However, the exclusive focus on mothers may serve to reinforce gender stereotypes that assign responsibility for raising children to women. This could have an adverse effect by excluding or discouraging the involvement of fathers or by increasing the burden on mothers. The revised version acknowledges the differing needs of mothers and fathers in terms of expanding their engagement in their children’s education. Promoting the active engagement of both parents improves the support and encouragement children receive. A familial commitment to education can improve attendance, retention, and outcomes.

In response to the local context, the revised version highlights the need to expand sensitization efforts in the proposed intervention area to focus on the importance of education for girls and boys. In these communities, girls are under-enrolled in school, so community sensitization efforts should focus on the importance of getting girls into school. At the same time, boys in these communities who are in school have high repetition rates, as they are frequently kept out of school to help with community work projects. In addition to the sensitization efforts around girls’ participation, sensitization efforts should also focus on helping the community understand the importance of the continuity of education for boys. Project activities, therefore, should be directed at addressing the differing needs of male and female learners to ensure that each child is able to fully benefit from education.

Key Points

- Ensure that the proposed or illustrative activities address the causes of the problems, constraints, or inequities the project is designed to alleviate.

- Be specific when outlining the intended outcomes, the proposed activities, and the projected participation of the target audience.
- Avoid designing activities that perpetuate existing gender stereotypes, such as mothers as caregivers and fathers as income earners. When designing activities, consider whether the proposed activities challenge or reinforce existing gender norms, roles, and expectations.
- Consider the different responsibilities, needs, and interests of men and women when designing project activities.

Monitoring and Evaluation

Purpose

Whether standalone or incorporated elsewhere in the solicitation, the monitoring and evaluation (M&E) section presents education officers with the opportunity to clearly and explicitly state what the project is intended to achieve. Incorporating gender issues into the M&E section allows education officers to ensure that implementers track and report on changes in gender norms, gender roles, and related factors that positively or negatively impact project implementation and results.

Integrating gender issues into the M&E section of a solicitation highlights the need for implementers to assess the differential impact of project activities on men and women. Specifying that implementers collect sex-disaggregated data for all people-level indicators will help ensure that implementers have the information needed to understand how project activities are impacting men and women.

Requiring a draft performance or award monitoring plan that includes sex-specific targets and gender-sensitive indicators can help ensure that offerors/applicants pay attention to gender issues in the design of project activities, and that they continue to do so throughout project implementation. This establishes a better basis for evaluating proposals/applications as it provides reviewers with the information needed to determine whether offerors/applicants have responded to gender issues in a superficial manner, or whether these considerations have truly been integrated throughout the project design.

Example

Before:

Expected Results:

“Equitable Access to Quality Basic Education Increased

- The number of children enrolled in USAID-supported schools...will be increased by between 51-60% depending on individual school status...

Teacher Practices/Competencies Improved

- Number of teachers trained (4,000 teachers will be trained in practices to promote child-centered teaching methodologies)...”

After:

Expected results *include increased, equitable access to quality basic education.* The number of children enrolled in USAID-supported schools will be increased by 51-60 percent, depending on individual school status. *In districts with current enrollment gaps favoring boys, at least 50 percent of new enrollees should be girls. In those districts with an enrollment gap favoring girls (e.g., several of the urban areas), at least 50 percent of new enrollees should be boys.*

Expected results include improved teacher practices/competencies. Four thousand teachers (at least 40 percent female) will be trained in child-centered teaching methodologies *that focus*

on the needs of boys and girls as individual learners. The new teaching methodologies should be reflected in the lesson plans of at least 80 percent of the trained teachers. Expected results include the creation of support networks in at least 80 percent of participating schools to promote the utilization of new methodologies.

Explanation:

Access and teacher training are two key components of this project and sex-specific target numbers are designated accordingly. With regards to the enrollment gap, targets vary based on the specific context of the intervention sites. In terms of teacher training, a percentage is given to reflect the expectation that the number of female teacher trainees is, at a minimum, reflective of the percentage of female teachers in the workforce.

Numerical parity is not the goal, nor is it sufficient to ensure that students or teachers actually benefit from access to these opportunities. However, providing sex-specific targets signifies the Mission's expectation that project activities must realistically and intentionally address any barriers to participation on the part of male or female teachers and students, such as administrators failing to nominate female teachers for training opportunities or families sending boys to work in informal sector jobs instead of attending school. Suggested interventions to address existing barriers should be included in the scope of work or description of activities section of the solicitation.

The revised version also helps to ensure that the training leads to transformation in the classroom, by requiring teachers to demonstrate how child-friendly methodologies will be incorporated into their lesson planning. To ensure ongoing support for the use of these methodologies and to promote sustainability, the revised version includes the expectation that support networks for teachers will be implemented.

Key Points

- Incorporate gender issues into the design and selection of project indicators, e.g., indicators that measure changes in gender norms or changes in the factors that act as barriers to boys' and girls' education.
- Utilize qualitative and quantitative indicators to track project results.
- Develop indicators across all levels (assistance objectives and intermediate results) that incorporate gender, e.g., assistance objectives that address gender-related constraints to education or intermediate results that measure diversity in pedagogical methods taught in teacher training institutes.
- Require the collection of sex-disaggregated data for all people-level indicators to accurately track the impact of project activities on men and women.

Reports

Purpose

Identifying specific gender-related reporting requirements is a simple, effective way for education officers to ensure that implementing partners track the project's progress towards addressing the root causes of the identified problems. The reports section typically specifies the type and frequency of programmatic and financial reports to be submitted. However, this section can also be used to specify the types of information on which offerors/applicants should report. Project reports can provide valuable information regarding changes in the societal context, the impact of project activities, and newly emerging barriers to project implementation.

Routine reporting of changes in gender norms and gender-related constraints to implementation will help project staff be more responsive and achieve enhanced results. These reporting requirements also ensure continued attention among project staff to gender issues, such as how gender roles are impacting project participation or how gender norms affect the policy environment in which the project is operating. Project reports that incorporate gender issues such as these are an invaluable tool for increasing understanding among implementing partners and USAID staff and enhancing overall project effectiveness.

Example

Before:

“The contractor shall provide quarterly reports detailing progress and accomplishments for all components of this program...”

After:

The contractor must provide quarterly reports detailing the progress of project activities for all components of the program. *Quarterly reports must include qualitative and quantitative information on project accomplishments. Where new gender-related constraints or opportunities arise, these should also be reported. All people-level indicators must be disaggregated by sex.*

The final report must include:

- *planned versus actual activities and targets, including an explanation of any divergences*
- *specific project accomplishments and impact*
- *challenges, recommendations, and lessons learned*
- *findings from the final gender analysis, including improvements in previously identified disparities and inequities*

Explanation:

Specifying the types of information that implementers must furnish ensures that they track more than just the progress of project activities. It ensures that education officers receive regular information regarding the extent to which project activities are impacting, or are impacted by, gender norms, roles, and relations. Routine reporting of changes in gender norms and gender-related constraints to implementation will help projects be more responsive and achieve better results.

The revised version also requires that a gender analysis be conducted as part of the final project assessment. Requesting the submission of reports on the gender analyses highlights their importance in assessing the project’s overall impact.

Key Points

- Include reporting requirements that track progress on gender equality issues in education that affect the project, whether violence at school, low completion rates, poor quality instruction, or other issues that impact boys’ and girls’ education.
- Request that results of an updated gender analysis be included in the final report. Ask implementers to address questions such as how gender gaps in education were closed, what new opportunities were created, what negative impacts were addressed or avoided, and what needs and disparities emerged or remain.

Key Personnel

Purpose

Key personnel must have the knowledge, skills, and commitment needed to develop appropriate responses to the identified problems. Understanding the cultural context and identifying the underlying barriers to education are critical skill sets that personnel with experience in gender and education can bring to any project. They can also identify any gender-related factors that may positively or negatively impact the project. To ensure that these gender issues are examined and addressed in a comprehensive way throughout the life of the project, a commitment to addressing gender concerns is needed at all levels.

Technical staff must understand the extent to which project activities impact, and are impacted by, gender norms, roles, and relationships. They must understand, and be able to address, the different constraints facing girls and boys, their differing needs and responsibilities, and the way power relationships impact their access to and participation in the education system.

Management staff must have sufficient knowledge and commitment to ensure that gender concerns such as these are addressed throughout the project. Including specific gender-related qualifications and responsibilities in the key personnel section of the solicitation will help education officers to ensure that proposed candidates have gender experience specific to the needs of the project.

Example

Before:

This solicitation “will address improved teaching performance by focusing on teacher learning at the school level.... [This approach] will enable teachers to work in groups to solve common problems around teaching content [and] classroom management...”

“Key Personnel: The key personnel that the Contractor shall furnish for the performance of this contract are as follows: Chief of Party.”

After:

Key Personnel: The key personnel that the contractor must furnish for the performance of this contract are as follows: Chief of Party (COP) *and Education Specialist. The COP will be responsible for the overall management and implementation of the project. The COP must have at least 10 years of experience managing and implementing education activities, which must include at least 5 years of experience with projects addressing teacher training or classroom management. A familiarity with and commitment to addressing gender equality in education is also required, as demonstrated by at least 2 years of senior-level experience working on education projects that addressed gender-related constraints to education.*

The Education Specialist must have a Doctorate or Master’s degree in education with substantial knowledge of the country’s education system, which includes a familiarity with current classroom management practices and teacher training initiatives. A minimum of 8 years of experience on similar projects within the region is required. Demonstrated experience (at least 5 years) addressing gender-related concerns in teacher training and classroom management projects is required. At least 2 years of experience addressing gender bias in curricula, implementing gender analyses, or conducting gender trainings is required.

Explanation:

The revised version specifies the type and amount of experience needed by the two key personnel to ensure that the project is able to effectively meet its goal of improved teaching

performance. The Education Specialist has the background needed to understand how gender norms in this country will impact teachers' ability to participate in teachers' groups. The specialist also has the experience needed to help teachers understand how the dynamics between boys and girls impact their engagement in the classroom and to enable them to better address issues of teaching content and classroom management. To ensure that the project is staffed by individuals who are able to address issues such as these, the CoP needs to have an appreciation of the role that gender issues play in improving teacher learning, classroom management, and teaching content.

The revised specifications ensure that management and technical staff have the skills and commitment needed to understand the gender-related constraints to education and to ensure the integration of gender concerns into project activities. Specific skill sets and areas of experience, and the corresponding number of years required, have been included in the revised version to ensure that the key personnel have the gender experience needed to successfully implement this project.

Key Points

- Design the scope and qualifications for key personnel to ensure that both management and technical staff have a demonstrated commitment to and experience with addressing gender issues in education activities. Be specific in identifying the necessary types of experience.
- Indicate that key personnel are expected to clearly and explicitly indicate their specific gender experience and qualifications in their resumes.
- Identify the number of years of specific experience required for each of the key personnel within each of the specified technical areas, for example, conducting trainings on gender and education, implementing gender analyses, or designing programs that address gender issues.
- Ensure that key personnel possess significant technical knowledge of gender issues in education by including these provisions in the technical specialist's role or by requiring a gender advisor on the project, if financial resources permit. If specifying a gender advisor, stipulate that the advisor be a part of the management team, thus ensuring that the advisor is in a position to directly impact project activities.

Instructions to Offerors or Preparation and Submission Guidelines

Purpose

Education officers can use the instructions to offerors and the preparation and submission guidelines sections to draw special attention to those elements deemed most critical to integrating gender concerns into program activities. While this section is a reflection of the gender issues highlighted throughout the solicitation, it also provides the opportunity to reinforce what is presented elsewhere and to emphasize the most critical elements. This section enables education officers to clearly and explicitly state how the offeror/applicant should incorporate gender issues within the proposal/application, such as through mandating a comprehensive gender analysis, specifying indicators, or requesting evidence of appropriate experience on gender issues in education. This helps to ensure that gender-related concerns will be incorporated throughout the proposals/applications.

Example

Before:

“The offeror should demonstrate an understanding of [the country’s] educational system and of the significant issues being faced in the education sector.... The contractor shall clearly describe how it intends to promote the replication of ‘pilot,’ ‘model’ or other activities undertaken...”

After:

The offeror must demonstrate an understanding of the country’s educational system and of the significant issues being faced in the education sector. *Gender issues, identified through a comprehensive gender analysis at the commencement of the project, must be addressed throughout all program activities. The contractor must clearly describe how the project intends to promote the replication of activities undertaken, and indicate how the differential impacts on male and female participants in all activities will be tracked.*

Explanation:

More explicit instructions in the revised version provide detailed information to offerors and reinforce the importance of addressing gender issues throughout the proposal. The revised version makes it clear that a gender analysis is a required component that must be completed during project start-up and prior to implementation, thus ensuring that data from the analysis will inform the detailed workplan and project design. Specifying that the contractor tracks the differential impacts also ensures that these issues are considered in the initial project design.

Key Points

- Instruct offerors/applicants to address their institutional capacity with regards to gender. Instructions should be explicit and include areas such as: experience in participatory methodologies and gender analysis; experience conducting gender trainings; and an institutional commitment to addressing gender equality issues.
- Stipulate that initial workplans present recommendations for addressing identified issues and gaps related to gender. Ask offerors/applicants to demonstrate how they would anticipate and deal with gender issues through integrated project activities.
- Caution against treating gender as an add-on component within activities, urging offerors/applicants to demonstrate the integration of gender issues throughout the project. Specify that proposed activities must address the causes of the problems identified in the solicitation.
- Request the completion of project-specific gender analyses at the beginning and end of the project.

Evaluation or Selection Criteria

Purpose

Since the evaluation or selection criteria set the standard for evaluating submissions, these sections provide the best opportunity for education officers to impact proposals/applications and, ultimately, the design and implementation of project activities. It is critical and required by the ADS that gender issues are incorporated throughout the evaluation or selection criteria as these form the basis for selecting the implementing partner. The partner’s capacity, knowledge, and approach will determine the extent to which the project satisfactorily integrates gender concerns and responds to gender-related constraints. Specificity and the comprehensive inclusion of gender-related elements in the evaluation or selection criteria provide the technical evaluation committee (TEC) with the tools and information needed to

determine whether a submission evinces either a cursory attention to gender or a comprehensive understanding and approach. It also ensures that offerors/applicants explicitly address gender concerns within their responses, increasing the likelihood of receiving proposals/applications that address gender-related concerns in a meaningful manner.

Technical evaluation committees evaluate proposals/applications based on the criteria set forth in the solicitation. Evaluation criteria must be clear and specific so that evaluators can determine how to rate the strengths and weaknesses of each proposal/application. The comprehensive integration of gender issues throughout the evaluation or selection criteria is essential for ensuring that proposals/applications that score high in other areas, but do not integrate gender issues, are ranked accordingly. Failure to address gender-related issues in one evaluation or selection factor may distort the results in terms of the offeror's/applicant's attention to gender issues. Allocating specific point values to gender-related criteria is one way of ensuring that gender-related evaluation or selection criteria are sufficiently acknowledged.

Evaluation or selection criteria should be consistent with the statements and information presented elsewhere in the solicitation, reinforcing the need to address gender issues in each of the technical sections. Establishing evaluation or selection criteria that are clear and specific will help ensure that the offeror/ applicant with the best capacity, staff, and program design will be selected.

Example

Before:

1. Technical Approach and Methodology...Clear understanding of the education system....
2. Management Capability...
 - a. Well-defined Work Plan with clear targets and benchmarks
 - b. A monitoring and evaluation plan with clear performance indicators...
3. Staffing Plan and Qualifications of Key Personnel... Demonstrated capability, experience, education and qualifications (including demonstrated management, leadership and interpersonal skills)..."

After:

1. Technical approach: Demonstrated understanding of the education system, *including constraints and opportunities that may limit the participation and achievement of either girls or boys. (20 points)*
2. Management capability: Well-defined Work Plan with clear, *sex-disaggregated targets* and benchmarks. A monitoring and evaluation plan with clear performance indicators, *including sex-disaggregated indicators that demonstrate progress in minimizing identified gender-related disparities or that highlight new or unexpected disparities affecting either girls or boys. (20 points)*
3. Staffing qualifications: Demonstrated experience and qualifications (including demonstrated management, leadership, and interpersonal skills *and a demonstrated ability to address gender equality issues in basic education programs*). (15 points)

Explanation:

The revised version specifies the gender-related evaluation criteria on which proposals/applications will be judged. It incorporates specifications within each evaluation category to ensure that gender issues are addressed in multiple ways throughout the proposal. It reinforces the Mission's commitment to addressing gender equality issues in education and demonstrates that a comprehensive approach is required. The specificity of the revised version ensures that offerors/applicants pay special attention to these aspects when preparing proposals/applications.

Key Points

- Incorporate gender issues into the evaluation criteria within each category of consideration (program description, technical approach, capacity, management plan, etc.).
- Specify that offerors/applicants will be assessed on the extent to which the proposal/application demonstrates a thorough understanding of gender issues and utilizes a comprehensive approach to address gender equality issues in education.
- Break down overall point totals for a particular category and allocate specific point values to gender-related components. For example, if the total point allotment for key personnel is 30 points, 10 points could specifically be allotted to the proposed individuals' experience with gender equality issues in education. Other areas where specific point allotments could be used to ensure the consideration of gender include conducting a gender analysis or developing a gender-sensitive M&E plan.
- Develop evaluation criteria that will enable evaluators to ascertain whether proposed activities actually address the causes of the identified problems.

GUIDELINES FOR REVIEWING PROPOSALS/APPLICATIONS

Once the education officer finalizes the technical components of the solicitation, the contracting or agreement officer will verify the instrument's compliance with the requirements of the ADS. The process of integrating gender into the procurement process does not end, however, with the issuance of the solicitation. The development of the TEC, the elaboration of the evaluation plan, and the process of reviewing proposals/applications provide additional opportunities for ensuring that responses to the solicitation adequately address the identified gender-related problems, gaps, and disparities.

Composition of the Technical Evaluation Committee

The evaluation criteria specify the terms of analysis, but the composition of the TEC is also critical. TEC members review and analyze proposals/applications, interpreting the requirements set forth in the evaluation plan. Evaluating the extent to which gender concerns have been incorporated into proposals/applications requires that at least one member of the TEC has sufficient technical knowledge of the impact of gender on education programming.

Just as geographic experience or sector-specific expertise is essential for analyzing the appropriateness of proposed activities, gender expertise is also a vital component. Committee members with gender experience can help ensure that the proposed strategies for addressing gender are an appropriate response to the problems identified in the solicitation. Gender expertise among the TEC members is an important part of determining whether proposals/applications recognize and respond strategically to gender-related inequities or if their attention to gender issues is superficial. This TEC member can also help ensure that the skills and qualifications of the proposed key personnel are appropriate in relation to the tasks and activities identified in the solicitation.

If the requisite technical knowledge on gender is not available within the unit evaluating the proposals/applications, it may be necessary to identify TEC members from other operating units who can participate remotely. Remote TEC members must be able to review the proposals/applications and engage in discussions with other TEC members as necessary.

Evaluating Proposals/Applications

Criteria for evaluating proposals/applications are established by education officers during the development of the solicitation. When developing the evaluation plan and elaborating on these criteria, it is important to be specific in the details provided to the TEC members. The sample evaluation form provides a partial example of how the evaluation factors specified in the solicitation are elaborated to form the basis for the review of proposals/applications. The additional details, especially regarding the gender-related evaluation criteria, can help TEC members determine the extent to which the proposals/applications meet the specified requirements.

The sample evaluation form is a partial representation of an evaluation plan for a solicitation that has addressed gender throughout. Figure 2 uses selected evaluation factors, sub-factors, and descriptions to paint a picture of the types of information that could be included in the evaluation plan. It is not comprehensive as it does not include all of the evaluation factors or sub-factors necessary for reviewing a proposal or application. Combined, all of the evaluation factors would add up to a total of 100 points.

FIGURE 2. SAMPLE EVALUATION FORM

Factor	Rating
<i>1. Technical Understanding and Approach (30 points)</i>	
a. project activities integrate gender issues throughout	
b. innovative, creative approach	
<i>2. Key Personnel: Education Specialist (15 points)</i>	
a. amount and type of experience in gender and education	
b. amount and type of experience in curriculum design or classroom management	
<i>3. Institutional Capability (15 points)</i>	
a. relevant experience in gender and education	
b. clarity of management plan	

Evaluation Factor I: Technical Understanding and Approach

Evaluation of the offeror's/applicant's technical understanding and approach will be based on the comprehensiveness of proposed activities and their ability to affect gender-related constraints to education. The sub-factors described below are of equal value:

1. project activities integrate gender throughout, addressing the root causes of gender-related constraints to education and identifying gender-related needs and opportunities
2. innovative technical approaches and creative merit of proposed methodology to achieve an improvement in classroom management practices and a redesign of the primary school curriculum

Evaluation Factor II: Key Personnel, Education Specialist

Evaluation of key personnel will be based on a qualitative assessment of the proposed candidate. In-depth knowledge of the country's education system is required. The specialist also must be proficient in analyzing gender-related factors that affect classroom management practices and curriculum design. The specialist must be able to develop a gender analysis and conduct trainings on gender issues in education.

The key personnel evaluation sub-factors listed below are of equal value:

1. amount (years) and type of experience on projects that addressed gender-related constraints and needs in education
2. amount (years) and type of experience in curriculum design or classroom management

Evaluation Factor III: Institutional Capability

Evaluation of the offeror's/applicant's institutional capability will be based on its institutional commitment to addressing gender and its prior experience successfully addressing the types of gender concerns identified in the solicitation. The sub-factors described below are of equal value:

1. relevant experience in gender and education, including experience in participatory methodologies, gender analysis, and gender trainings
2. clarity of management plan

As this example illustrates, the key points identified in this guide can be translated into evaluation criteria and reflected in the evaluation plan. For example, the key personnel section specifies the type and number of years experience needed by the education specialist.

Specificity and the use of examples in the evaluation criteria and the evaluation plan can provide TECs with the additional information needed to assess the extent to which proposals/applications are comprehensively and effectively addressing the gender issues outlined in the solicitation.

CONCLUSION

This guide has provided section-by-section tips for integrating gender issues into USAID solicitations. Systematically analyzing the impact that gender norms, roles, and relationships have on educational access, quality, retention, achievement, and outcomes helps education officers strengthen the solicitation, enhancing the responses proposed by offerors/applicants. A well-designed solicitation that incorporates gender issues throughout can lead to programs that are more responsive to the needs of host country partners, more effective in achieving the intended results, and, therefore, more sustainable in their impact.

APPENDIX A: ADS GENDER REQUIREMENTS RELATED TO REQUESTS FOR PROPOSALS AND REQUESTS FOR TASK ORDER PROPOSALS

***302.3.5.15 Incorporating Gender Issues into Solicitations**

Effective Date: 11/05/2009

USAID must address gender issues in all USAID-funded activities (see [ADS 201.3.11.6](#)). For solicitations, such as Requests for Proposals (RFPs) and Requests for Task Order Proposals (RFTOPs), the Contracting Officer (CO) must ensure that the requiring office integrated gender issues in the procurement request or provided the rationale, as approved in the Activity Approval Document, for why gender is not an issue for the particular activity to be implemented through the requested contract action (see ADS **201.3.11.6** and **201.3.11.16**).

When the procurement request integrates gender issues into the different contract performance components, e.g., Statement of Work, project deliverables, key personnel qualifications, and monitoring and evaluation requirements, the CO must work with the technical office to ensure that the technical evaluation criteria (e.g., technical understanding and approach, monitoring and evaluation, personnel, etc.) correspond to these contract performance requirements. Within these major evaluation criteria, however, gender issues should not be separate subcriteria with maximum possible points assigned to them, since this dilutes their significance.

If the procurement request does not comply with the requirement in ADS **201.3.11.6** and **201.3.11.16** to either include contract performance and qualification requirements that reflect gender issues or the rationale for why gender is not an issue for the particular contract action, then the CO will notify the requiring office that he or she is unable to take any further action on the request until the office meets one of the requirements.

For technical assistance and additional guidance, consult the USAID Mission, Office or Bureau gender specialist or the Office of Women in Development in the Bureau for Economic Growth, Agriculture, and Trade (EGAT).

**An asterisk indicates that the adjacent information is new or substantively revised.*

APPENDIX B: ADS GENDER REQUIREMENTS RELATED TO REQUESTS FOR APPLICATIONS AND ANNUAL PROGRAM STATEMENTS

303.3.6.3 Evaluation Criteria

Effective Date: 11/05/2009

- *c. Gender issues. USAID must address gender issues in all USAID-funded activities (see ADS 201.3.11.6). In RFAs (including those for Leader/Associate Awards) and APSs, the Agreement Officer must ensure that the RFA or APS:
- Integrates gender issues into the solicitation or includes a rationale for not addressing gender in the project or activity, in accordance with ADS **201.3.11.6**. When USAID directs applicants to incorporate gender issues into their applications, the RFA or APS must state the requirements in the different performance components, e.g., Program Description, key personnel qualifications, and monitoring and evaluation requirements.
 - Integrates gender issues into the technical selection criteria (e.g., technical understanding and approach, monitoring and evaluation, personnel, etc.) that correspond to the performance requirements stated above, unless an approved rationale for not incorporating gender issues has been included in the RFA or APS.

If the program/project office provides the Agreement Officer with a procurement request for a program that does not include the requirements in ADS **201.3.11.6** for either integrating gender issues in the Program Description or the rationale for why gender is not an issue for the particular assistance program it intends to fund, then the Agreement Officer will notify the program/project office that he/she is unable to take any further action on the request until it meets one of these requirements.

For technical assistance and additional guidance, consult the USAID Mission/Office or Bureau gender specialist or the Office of Women in Development (WID) in the Bureau for Economic Growth, Agriculture and Trade (EGAT).

**An asterisk indicates that the adjacent information is new or substantively revised.*

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