

Report on the workshop on developing an
AGEE national dashboard on accountability for
gender equality in education for
South Africa

Department of Basic Education, Pretoria

2 May 2023

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1. Aims and organisation

The workshop, which reported on the work of the AGEE (Accountability for Gender Equality in Education) project and discussed indicators for a national dashboard for South Africa, was co-organised by Dululu Hlatshaneni, Deputy Director of Social Cohesion in the Department of Basic Education (DBE), Professor Lebo Moletsane, J.L. Dube Chair in Rural Education at the University of KwaZulu-Natal and Professor Elaine Unterhalter, Professor of Education and International Development at University College London.

The aims of the workshop were to:

- Present an overview of the AGEE project and work done so far
- Review the gender indicators used by EMIS and linked to DBE's research, considering whether or not they go beyond simple parity
- Reflect on the indicators currently (2023) being finalized for the AGEE cross-national dashboard
- Reflect on discussions held in South Africa in 2019 and 2020 on a South Africa national dashboard (background documents circulated)
- Discuss criteria for selecting indicators for a national dashboard for South Africa and the aims for a national dashboard
- Review indicators for a South Africa national dashboard
- Reflect on steps needed for gathering data and assembling information for a South Africa national dashboard – training and training materials needed, timeframes, people to be involved, and funding sources

The workshop programme (Appendix 1) allowed for discussion and reflection on the work done so far in AGEE (summarised in Appendix 2), reflections on criteria for an AGEE national dashboard for South Africa, and a review of indicators that could be used in an AGEE national dashboard, building from work done to-date on the AGEE cross-national dashboard and some of the discussions already held in Sierra Leone and Malawi.

This report summarises some threads of discussion in all these areas and the conclusions.

2. Participants

Participants at the workshop came from the DBE, Statistics South Africa, academics at a number of universities, and NGOs with an interest in gender and education issues. Participants were welcomed by Likho Bottoman, Director for Social Cohesion and Equity in the DBE, who appreciated the work planned in thinking about gender empowerment and gender equity in the basic education sector. (For a full list of participants, see Appendix 3.)

3. Reflections on the AGEE project and AGEE Framework

In reflecting on the work done on the AGEE project thus far, participants welcomed the dashboard approach to planning and accountability, which is flexible with regard to what can be put in and taken out, and allows for much more contextual information than many cross-national indicator systems. But a number of issues were raised regarding definitions of gender, and whether these should encompass both the range of relationships that currently exist and are documented and different permutations of gender identity, which were not yet documented through official statistics. Other areas where a lot more definitional discussion was needed in different communities related to meanings of inclusivity, gender justice, gender transformation and gender equity. Current hosting of the AGEE project was discussed, and the ways in which some of the discussion around indicators and

a national dashboard might be used in developing the Education Sector Plan (ESP). The need to connect with initiatives from the Department of Women was stressed, particularly their work on Gender Responsive Planning, Budgeting, Monitoring and Auditing.

4. Aims for a national dashboard

Workshop participants discussed a draft of aims for a national dashboard for accountability in gender equality in education.

The draft aims agreed after discussion were:

The aims of the national AGEE dashboard, to be developed through participatory discussions with key stakeholders, are to:

- i) Adapt the AGEE Framework for use in South Africa, enabling government, diverse institutions, including academics, research institutions, civil society and international organisations, to evaluate changes in gender and intersecting inequalities in, around and through education
- ii) Co-ordinate the use of a range of different existing data sources (including raw data) and doing an inventory and, if possible, a meta-analysis of that data enabling connections to be made to the aspirations of a wide range of stakeholders concerned with gender equitable and gender transformative processes in, around and through education and the publication of a report every year /every two years
- iii) Adhere to consultatively agreed criteria for the national dashboard, as these are revised through an agreed ongoing process and timeline, contributing to refining criteria for provincial and project-based criteria in South Africa
- iv) Contribute to the work of other countries working on criteria to use with national dashboards
- v) Build buy-in through the annual reports to inform, influence and where desirable participate in the drafting of key documents by government and relevant institutions— e.g., work on the Education Sector Plan, EMIS, the national strategic plan on GBV, Department of Labour, Correctional Services plans etc.
- vi) Support strategic planning for potential actions to locate and develop data to feed into national, provincial, district and institutional planning and policy on women's rights, gender equality, intersectionality and education
- vii) Support the building of consultative processes to involve children's, adolescents' and young people's voices in the development and the use of the dashboard
- viii) Provide lessons learned about the process of developing a national dashboard for use, as appropriate, by groups working on project, NGO, social movement, neighbourhood or institution (universities, TVET, schools) focussed dashboards

5. Criteria for indicators for a national dashboard

Workshop participants discussed criteria for the indicators to be included in a national dashboard, amending and refining criteria used in developing the AGEE cross-national dashboard and proposed for the Malawi national dashboard (see Appendix 4).

6. Indicator Selection

Discussion in the workshop reviewed indicators proposed for two AGEE domains (Resources and Values) (see Appendix 2, AGEE Background Paper, for details of the AGEE Framework). Online discussion conducted after the workshop led to additional reflection on candidate indicators for the remaining AGEE domains. The suggested indicators arising from the workshop for all the AGEE domains are detailed in Appendix 5.

7. Next steps

Workshop participants considered the meeting had helped establish a South Africa AGEE task team that could take forward planning to present work on the AGEE dashboard as part of the DBE's CSTL (Core Support for Teaching and Learning) work, outlining how work on the dashboard could benefit that initiative. It was agreed Dululu Hlatshaneni would present the work of the task team to the DG, with a view to taking the initiative to Ministers, Deputy Ministers and Heads of Department. The aims for the AGEE project led by the DBE would be to support the research work needed to establish the dashboard and engage in discussions say every two years with analysts who could distil what the dashboard was showing and to produce an AGEE Report on the state of gender equality in and through education in South Africa.

The meeting acknowledged that work on the dashboard had implications for the work of many government departments, and some of the monitoring work currently under way with regard to the SDGs. Key departments to draw into discussion were the Departments of Health, Social Development, Women, and Police.

Future AGEE South Africa meetings should include representatives from DHET, HSRC, MRC, CSIR, NIHSS.

The potential for the AGEE dashboard to be used in institutional planning initiatives, such as those currently underway at the University of KwaZulu-Natal were also outlined. The dashboard could also support expanding some of the frameworks for current research in DBE.

8. Funding plans and proposals

Some possible sources to approach for funding include UNICEF and the EU.

APPENDIX 1

Programme for AGEE dashboard workshop

Department of Basic Education, Pretoria, 2 May 2023

- 9am: Introductions: workshop participants; aims for the workshop, AGEE project**
- 9.30am: AGEE cross-national dashboard: work done, process and lessons learned for building national dashboard from discussions in Malawi and Kenya**
- 10am Establishing aims for a national dashboard and criteria for selecting indicators for a national dashboard; reflections on EMIS indicators and DBE indicator research**
- 11am: Break**
- 11.15am: Developing the national dashboard: what is missing from cross-national dashboard; preliminary discussion of where to find sources that meet criteria**
- 1pm: Lunch**
- 1.45pm: Developing the national dashboard continued**
- 3pm: Break**
- 3.15pm: Developing the national dashboard continued; next steps**
- 4.30pm: Thanks, and close**

APPENDIX 2

Background paper: The AGEE Framework and Dashboard

Elaine Unterhalter, Helen Longlands and Rosie Peppin Vaughan, May 2023

Introduction

The Accountability for Gender Equality in Education (AGEE) project is working to develop an indicator framework for gender equality in education that can support the United Nation's Sustainable Development Goals (SDGs) framework. AGEE is funded primarily by the UK ESRC (Economic and Social Research Council) and FCDO¹ and is a partnership between researchers at universities in Malawi, South Africa and the UK, working with selected UN agencies, bilateral donors and a range of government and civil society organisations. This background paper first contextualises the AGEE project in the broader SDG Agenda, then outlines work done to-date on developing the AGEE Framework and AGEE cross-national dashboard.

Gender and SDG4 measures

Gender equality in education remains a priority area locally, nationally and globally, for governments, civil society and multilateral organisations. The SDGs spotlight gender equality as a key dimension of sustainable development (Sen, 2019). SDG5 expresses an overall vision for gender equality, while targets associated with gender equality are linked with many other goals (Equal Measures, 2022). In SDG4 (the education goal), gender parity (which measures the ration of girls to boys or women to men in a given aspect of education, such as enrolment, and attendance) is a feature of 8 of 12 indicators.² Targets 4.1- 4.3 and Target 4.5 are concerned with eliminating gender disparities in access to, participation in, and skills and knowledge development in all levels of education from pre-primary to adult and vocational education. Target 4.7 includes 'gender equality' in the list of knowledge and skills to be achieved, but there is currently no indicator for this particular dimension. For three targets – Target 4a-c – concerned with means for implementing expanded provision and improved attendance, progression and attainment, looking at infrastructure, sanitation, vocational training and teacher training and supply, there are no gender indicators. Both the narrow focus on gender parity and the lack of gender indicators for some of the targets means there are currently serious gaps in the SDG framework relating to data that can adequately measure the full complexities of gender inequalities relating to education, which has consequences not only for realising SDG4 but the whole SDG agenda.

Gender parity in basic education indicators such as participation, progression and achievement is a measure widely used by educational planners, governments and campaigners. Examples include national education sector plans (ESPs), data collected and analysed by UNESCO's Institute for Statistics (UIS), and the related annual Global Education Monitoring (GEM) Reports published by UNESCO (e.g., UNESCO 2018, 2020), as well as regional learning surveys, such as PASEC and TERCE. Huge advantages of gender parity as a measure for education indicators are that it is conceptually clear and methodologically straightforward, it uses existing data collection systems, such as EMIS, examination boards or household surveys, and it is easily applicable and uses comparable data across different contexts (Unterhalter, Longlands & Peppin Vaughan, 2022). However, gender parity does not fully capture the many complexities of gender inequalities and how these could be documented (Merry, 2016; Sen, 2019; Unterhalter, 2014).

¹ Project reference: ES/P005675/1. AGEE has also received support from UCL Covid Support Scheme, the Department of Education Practice and Society (EPS), UCL, and worked in partnership with UNESCO, UNGEI, ActionAid and GPE on specific projects.

² For full list of SDG4 Targets and Indicators, see: <https://sdgs.un.org/goals/goal4>

Overall, the SDGs represent an expanded vision of education, and gender equality in education, particularly compared to the MDGs (Wulff, 2020). In practice, however, the SDG measurement framework and the ways in which it uses existing data do not orient to a fuller engagement with the complexities of and the urgency of addressing gender inequalities associated with education.

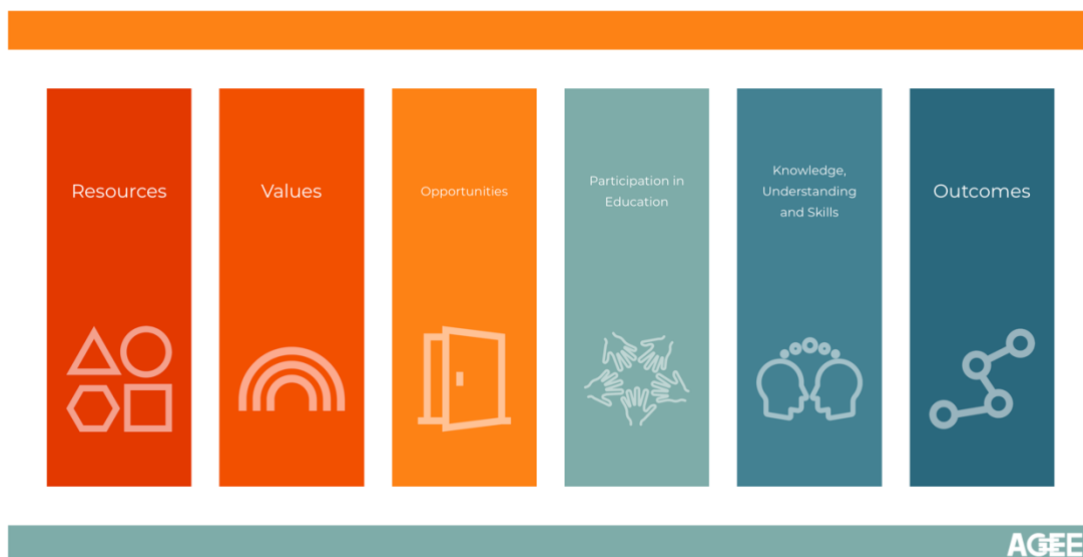
The AGEE Project

Through a series of critical participatory discussions and in-depth interviews, the AGEE project has, as of January 2023, consulted with over 400 representatives from government education departments, national statistical offices, civil society, academia and youth advocacy groups in Malawi and South Africa, and with a wide range of international students and organisations working on gender and education issues. These discussions have provided insight into what constitutes gender inequality in education in different locations and contexts, as well as what issues are more applicable across diverse contexts, what data is perceived to be key to evaluating these inequalities, and how data and indicators might be used to bring about change. In addition, a range of pressing gender issues in education for which there are insufficient, or no data, have been highlighted.

The AGEE Framework

The AGEE Framework sets out six distinct but interconnected ‘domains’ that we consider (based on conceptual and empirical work) need to be represented within a more holistic measurement framework for gender equality and education: Resources; Values; Opportunities; Participation in Education; Knowledge, Understanding and Skills; and Outcomes.

AGEE Framework



1. The Resources domain reflects the goods and services required for a gender equitable education system. Resources include, for example: funding, policies, school infrastructure, trained teachers, administrators, support workers and information.
2. The Values domain contains information on norms relating to gender and education, for example, provisions in constitutions, and survey data on attitudes to girls’ and women’s education.
3. The Opportunities domain reflects the policy context and economic and social environment, such as laws, and national curricula. This domain includes ideas about, for example: the policy context and how this is put into practice; gendered aspects of the political, economic, geographic and cultural/social environment; and gender relations within educational institutions.

4. The Participation domain considers gender differences in the capability to participate in education, and levels of participation and progression of girls and boys in all levels of education. Measures in this domain might include, for example: looking at differences in participation in education by socio-economic status, location, race, ethnicity.
5. The Knowledge, Skills and Understanding domain captures information about learning across all areas of the curriculum (not just literacy and numeracy), ideally including values around rights and gender equality; and forms of learning and teaching.
6. The Outcomes domain takes a broad definition of the results of education, for example, to include economic empowerment, political participation, and speaking out against gender-based violence (Unterhalter et al., 2022).

By gathering information across all six AGEE domains, it is possible to provide a substantive picture of gender equality in an education system, as well as a range of forms of inequality and marginalisation. The AGEE Framework is also designed to be flexible to context, so that it is possible to get a sense of levels of inequalities in capabilities across different locations and situations.³ In the longer term, it is envisaged that the AGEE Framework will inform data use at international, national and local levels.⁴

Work in the AGEE project between 2021-2023 is concerned with the global aims of the SDG measurement system and entails creating a cross-national dashboard of indicators linked to the domains of the AGEE Framework. This dashboard will allow evaluations of how successful initiatives and policies have been in addressing the injustices associated with the multiplicity of forms of gender inequality in education. In developing this dashboard, the aim is both to construct an alternative measurement framework by drawing on existing data that has not yet been used in SDG4, and also to lobby for further improvements in data collection in response to gaps identified.

Developing the AGEE cross-national dashboard

The process of creating the cross-national dashboard has involved a number of stages. Initially, fieldwork conducted in Malawi, South Africa and with international stakeholders during the first phase of the AGEE project (2018-2021) enabled us to compile a longlist of candidate indicators. This longlist was based on suggestions of:

- What constitutes gender inequality in education in different locations and contexts?
- What data could be key to evaluating these inequalities?
- Which data and indicators might be used to bring about change (including existing SDG indicators)?

Next, we drew up a list of criteria for selecting indicators, drawing on criteria developed for other alternative measurement frameworks. This list, which has been refined through participatory discussions, has three levels:

1. Criteria which apply to single indicators
2. Criteria which apply to the balance of indicators in each of the AGEE domains
3. Criteria which apply to the dashboard as a whole

At each level, there are essential and desirable criteria.

While there are many areas that the AGEE cross-national dashboard does not currently cover, it is a pragmatic attempt to consult on the important issues affecting gender and education, survey which

³ Flexibility and responsiveness are important because of the variability of data availability and issues across different regions and countries – e.g., if completion data is hard to collect, or certain forms of violence are of particular issue in a specific context, there can be some flexibility for which measures are used.

⁴ For more detail on the application of the AGEE Framework see, [https:// gendereddata.org](https://gendereddata.org)

data are available (and which may be available shortly, or may need to be lobbied for), and then take an appropriate selection of indicators that represent different areas of gender inequality in education that reflect a more substantive and holistic approach. Further, the process of building the dashboard has illustrated that more gender education indicators exist in some domains (e.g. Resources and Participation) than others, as it has been much harder to identify sources of data for values relating to gender and education, opportunities (especially those which reflect intersecting inequalities associated with ethnicity, region and poverty) and information relevant to a broader understanding of gender equality in outcomes to education beyond exam results.

To date workshops on building forms of national dashboard have been held in Sierra Leone, in conjunction with Gender at the Centre Initiative (GCI), Malawi, Kenya, in collaboration with the projects involved in the Girls' Education Challenge (GEC) and in South Africa.

References:

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- Wulff, A. (Ed.) (2020). *Grading Goal Four: Tensions, Threats, and Opportunities in the Sustainable Development Goal on Quality Education*: BRILL.

APPENDIX 3

Workshop participants

Name	Affiliation
Dululu Hlatshaneni	Department of Basic Education
Lebo Moletsane	University of KwaZulu-Natal
Elaine Unterhalter	University College London
Richard Baloyi	Department of Basic Education
Selde Workhu	Statistics South Africa
Nosipho Mbonambi	Department of Basic Education
Selaelo Makatu	Department of Basic Education
N Thakgheti	Department of Basic Education
L Sobaneng	Department of Basic Education
Emily Stofile	University of Pretoria
Halima Nomkulu	University of Johannesburg
Beatrice Akala	University of Johannesburg
Thandi Lewin	University of Johannesburg
Brian Sibelo Ngidi	Uthingo Network

APPENDIX 4

Criteria for the AGEE South Africa national dashboard

CRITERIA THAT APPLY TO THE PORTFOLIO OF INDICATORS ASSOCIATED WITH THE AGEE SOUTH AFRICA NATIONAL DASHBOARD AS A WHOLE

Essential criteria for portfolio as a whole

1. The portfolio of indicators should be transparent, easy to communicate in all the official languages of South Africa, interpret and comprehend.
2. The portfolio of indicators should be balanced across each of the AGEE domains, avoiding overlaps and taking into account gaps, and suitable proxies (transparently explained), representing as appropriate each sub-domain. For each of the AGEE domains, there should be at least two indicators.
3. The portfolio as a whole should include at least some indicators that highlight particular gender inequality, intersectionality and women's rights concerns within and beyond the education sphere, e.g., gender-based violence, reproductive rights. The portfolio should include at least one indicator in each AGEE domain relating to women's rights and a gender transformative perspective that goes beyond merely noting different experiences of men and women and instead seeks to help dismantle the institutions, relationships and/or distributions of power that establish and maintain unjust and discriminatory processes and outcomes.

Desirable criteria for portfolio as a whole

4. As new indicators become available in the AGEE domains where information has not been routinely assembled, they should be given priority. New indicators need to meet all essential criteria for being included as indicators in the national dashboard. (New indicators should be sought as additional relevant issues emerge over time; thus, an agenda around existing gaps will be actively documented by the project.)
5. The portfolio of indicators should be sensitive to the inclusion of the poorest, most marginalised crisis-affected and displaced populations, and the processes through which they are often excluded from data collection. (While indicators of these experiences may not be immediately available, they will inform the application of criteria 4 and 6.)

CRITERIA THAT APPLY TO THE BALANCE OF INDICATORS WITHIN EACH AGEE DOMAIN:

Essential criterion for balance of indicators within each AGEE domain

6. The selected indicators for each AGEE domain should highlight the most important issues in that domain, noting gender and intersectional inequalities as articulated by groups affected, concerned and engaged with a process of gender transformational change. (A list of gaps will be maintained where national indicators do not exist, and this will be used to establish a priority list for action in filling data gaps.)

Desirable criterion for balance of indicators within each AGEE domain

7. The selected indicators for each AGEE domain should include some objective and some subjective indicators, where appropriate to the domain⁵.

CRITERIA THAT APPLY TO SINGLE INDICATORS

Essential criteria for single indicators

8. Relevance. Relevance for assessing gender inequality and equality in access to, around, in and through different kinds of learning sites and their impacts *on* education in the first five domains of the AGEE Framework, and as an outcome of education in the sixth domain (Outcomes).

9. Legitimacy. The indicator in question qualifies as relevant and legitimate in the sense that it is endorsed (and rated highly vis-à-vis other potential indicators) by relevant stakeholders concerned with gender transformative approaches.

10. Disaggregation by demographic characteristics as relevant. The indicator, where appropriate, can be disaggregated by population sub-group and reviewed drawing on descriptive intersectionality⁶ – the most relevant for our purposes and to be investigated as appropriate are sex / assigned gender, gender identity, expression, sexual orientation, race, ethnicity, disability, age, religion and belief, social and economic class / status, geographic location, and national status / citizenship.

11. Geographical coverage. For each indicator, measures are available that permit monitoring across all provinces and at national level

12. Aspect of inequality and/or equality. The indicator captures a result in terms of an outcome or process associated with the layers of focus for analysis, monitoring and evaluation on gender equality and intersectional opportunities in and through education (see Appendix 2).

13. Frequency. Where appropriate, the indicator is (or could be) collected reasonably frequently (at least every five years) for monitoring purposes.

14. Level. The indicator relates, where appropriate, to individuals, households, schools or broader social or political units including humanitarian coordination structures.

15. Robustness. The indicator is subject to the standard statistical requirements of accuracy, reliability, validity and coverage.

16. The indicator is available and comparable internationally as appropriate.

⁵ In this context, ‘subjective indicators’ are those which capture a subjective component, such as personal perspectives, experiences or personal assessments (for example, responses to questions on experiences of bullying or discrimination, or life satisfaction). Objective indicators are independent from personal evaluation of the respondent and may be based, for example, on external observations or other forms of data collection, such as literacy rates, or life expectancy.

⁶ ‘Descriptive intersectionality’ is defined by Unterhalter et al. (2020), as an approach which highlights overlapping differences within groups defined by gender. They present this as an interpretation of intra-categorical intersectionality in McCall’s (2005) distinction between intra-categorical, inter-categorical, and anti-categorical formulations of intersectionality. Please see Unterhalter, E., Robinson, L., & Balsera, M. (2020). ‘The politics, policies and practices of intersectionality: Making gender equality inclusive and equitable in and through education’. *Background paper prepared for the Global Education Monitoring Report Gender Report*.

Appendix 5 – Indicators proposed at the workshop and in subsequent discussion for the South Africa national dashboard