**V. EQUITY-Quantitative Analysis**

Equity is a category on its own, and yet it can critically influence VfM. For example, the sustainability of an intervention (and of its impacts on the long run), is often driven by whether the maximum level of stakeholders feel empowered by an intervention – particularly those who are the most vulnerable. An intervention that enhances inequitable outcomes, and thus potential conflicts (such as, over access to resources) will tend not to be sustainable in the long run. An intervention might be economic (cost-minimising through optimal procurement), efficient (maximising outputs for available inputs) and effective (generating the desired change) and yet fail to consider equity. In this scenario the intervention may be sustainably vulnerable.

As a cross-cutting element of VfM, equity can cover many aspects, from ethical procurement to programmatic decisions, and may work across different levels, such as:

* At an ‘economy’ level, equity might consist of applying sustainable procurement – the cheapest of sustainable options – rather than choosing the cheapest goods. It can also mean a preference for using local producers compared to global ones (importing goods from richer countries).
* At an efficiency level, equity might consist of choosing methods of delivering activities that enhance local economies (for example, by employing community members) even though this delivery choice might be more ‘expensive’ per activity undertaken.
* At an effectiveness level, equity might consist of putting into the equation the relative impacts of an intervention concerned with different population categories, such as more vulnerable populations or women.

### **Section A: Guidance**

##### **Step 1: Identify equity components**

In the context in which your programme sits, choose up to six equity components to focus on. These are often population sub-groups with a particular characteristic that makes them potentially vulnerable. For example, the criteria may be based on place (such as living in an area with high risk of flood), gender, age, health (such as HIV status, disability status), and economic (perhaps income places them at risk of food poverty).

##### **Step 2: Map the outcomes to equity components and equity indicators**

List the outcome or impact incidence, measured for programme effectiveness, in your log frame (or Theory of Change (ToC)). Next to each outcome, list the relevant chosen equity components. For example, if ‘improved primary school attainment’ is an outcome, it could be split by gender (‘out of the total number of beneficiaries experiencing improved primary school attainment, X% were girls’) or economic vulnerability (‘out of the total number of beneficiaries experiencing improved primary school attainment, X% were children at risk of food poverty’).

You can map potential indicators for measuring equity next to each equity component. You can then use the data collected as part of the programme; for example, the number of girls that attend school as a result of the intervention, or the income distribution of the programme beneficiaries. If your current M&E system does not allow for such breakdown, you should plan for it at the planning stage of your intervention.

##### **Step 3: Find the outcome-level equity component proportion**

To find the breakdown of each outcome per equity component:

1. **If the outcome level equity indicator is known** i.e. the gender split or economic vulnerability across the outcome beneficiaries. For example, if it is known that 40% of the children attending school as a result of the programme are from households at risk of flood, then out of the total numbers of beneficiaries experiencing improved primary school attainment, 40% are at risk of flood.
2. **If the programme level equity indicator is known** then these proportions can be used to estimate proportions for the outcome level. (For example, the gender split or economic vulnerability across the wider programme beneficiaries.) As such, the proportion of the beneficiaries in the equity component sub-group, at programme level, is estimated to be the same at outcome level. (For example, if it is known that 10% of programme beneficiaries are at risk of food poverty, then it could be estimated that out of the total number of beneficiaries experiencing improved primary school attainment, 10% were children at risk of food poverty.
3. **If the programme level equity indicator is not known** then the population level proportions (or baselines) can be used to estimate proportions for the outcome incidence.

For example, using national datasets or secondary research, it is found that 30% of children in the region attending primary school are girls. Then it could be estimated that out of the total number of beneficiaries experiencing improved primary school attainment, 30% were girls. Baselines for indicators can be found by searching for regional, or national, data in international databases such as:

* + ***<http://knoema.com>/***
  + [***http://data.worldbank.org***](http://data.worldbank.org)***/***
  + [***http://www.who.int/gho/en***](http://www.who.int/gho/en)***/***

National offices of statistics, academic research or reports from other organisations are also good sources of data.

The following steps are only relevant if the outcome or programme level indicator is known (meaning that Steps 3a or 3b were used).

##### **Step 4: Identify the regional or national baseline**

Baselines for indicators can be found by searching for regional or national data in international databases, such as those listed above.

National offices of statistics, academic research or reports from other organisations are also good sources of data. Ensure the baseline and indicator are entered in the same unit (for example: %, hectares, and so on).

##### **Step 5: Compare results**

The baseline number is the equity indicator that you would expect if no additional equity considerations were taken into account. Therefore, for each equity component, take the difference between the (estimated) outcome equity indicator (found in Step 3) and the baseline equity indicator (found in Step 4):

* If the difference between the programme indicator and baseline is **positive**, there has been a positive equity bias in the programme (meaning that the programme has specifically advantaged more vulnerable groups in the population).

If the difference between the programme indicator and baseline is **negative**, the programme has not specifically advantaged more vulnerable groups in the population. Instead, this suggests the programme may have disproportionally advantaged the most ‘easy to reach’, or least vulnerable in the population.