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The Process of Formulating Quality of Life Indicators Using a Gender Perspective. The Need for "Gendered" Indicators in Urban Policy, Programme and Project Analysis"[1]

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Introduction

The word "indicator" suggests a warning, an announcement, a guide, a representation, a signal, or a trace. An indicator is something that provides a key to understanding more complex or important issues, it can make perceptible a tendency or phenomena which is not immediately detectable. (Hammond, 1995 in De Wel, 1995). Defining, measuring, comparing and analysing urban indicators for sustainability and quality of life have become crucial to understanding the urban planning and management process. Such indicators are important tools to face the challenge of improving our cities, mainly by knowing how well or bad we are living. Information regarding the current situation can guide us towards better proposals to ameliorate the living conditions of the future.

The fundamental objective of indicators is to orient action. This differentiates indicators from other type of numeric information, as an indicator is part of a control and management process (Bakkes, 1994 in De Wel, 1995). This makes indicators an important tool to analyse the results, effects and impacts of policies, programmes and projects.

Moreover, sustainability indicators and quality of life indicators are conceptually different, though not mutually excluding and complementary, and thus require a different methodological approach if they are intended to be useful to this analysis. The main difference is based on the fact that the evaluation of quality of life, contrary to sustainability, is context specific and is determined by the facts of life and people's perceptions and assessment of them. In other words, it is the interaction of the objective and subjective that determine the quality of human life. (Szalai, 1980).

The subjective characteristic of quality of life implies that the same physical object or a specific experience may be perceived differently depending on the person. This is when the gender perspective becomes useful to evaluate and perceive quality of life, as perceptions are not standard. Most literature relating quality of life treats 'human beings', 'people', 'communities', 'households', as homogeneous

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groups, when indeed they contain a diversity of relations that cannot necessarily be classified as having similar needs or interests. By looking at quality of life through the gender and environmental prism, it becomes apparent that the perceptions vary depending on the existing gender relations and roles, the needs, access to and control over the resources men and women have and the decision making process taking place. This difference in perceptions is important for the planning process, particularly at a local level, as it can generate a more efficient, effective and equitable use of resources.

Thus the need to find ways of studying indicators of quality of life in urban areas which incorporate broader visions, such as gender. Though attention has been paid to include a gender dimension to urban indicators, this has usually been done by 'adding on' gender indicators. Indeed, including gender indicators is essential to the urban planning and management process, however, the whole process needs to be "seen" through gender spectacles. It appears that some vital steps are needed to truly incorporate gender, particularly in the data collection and analysis phases of indicator generation. In the study of quality of life, gender implies more than attaching indicators to the existing list; it involves using this perspective to cut across the issues of quality of life.

Given the gap in current research involving quality of life indicators, this paper analyses the need and ways to go about using gender and "gendered" indicators to analyse urban policies, programmes and projects. To do this, it first explains the need for indicators in the planning process. Secondly, it analyses why the incorporation of gender to the study of quality of life in urban sectors is important. It then describes the difference between gender and *"gendered"* indicators. Finally, it suggests ways of using gender in a transversal manner for urban indicators of quality of life and the way this can be included at a local planning level.

Indicators in the Planning Process

In order to identify the relevance of indicators in the planning process they need to further defined. An indicator is a signal and can be seen in the form of a measure, a number, a fact, an opinion, or a perception that is geared towards a specific condition or situation, and it measures changes in this condition or situation over time. In other words, indicators provide a deep look to results of initiatives and actions (ACDI- SERNAM, 1998) and provide a guidance to what is needed. An indicator can also help us understand where we are, what road we are following and how distant we are from where we want to be. A good indicator warns us about a problem before this becomes extreme and it helps us to recognise what needs to be done or what direction to take in order to revert the process (Hart, 1996: 1).

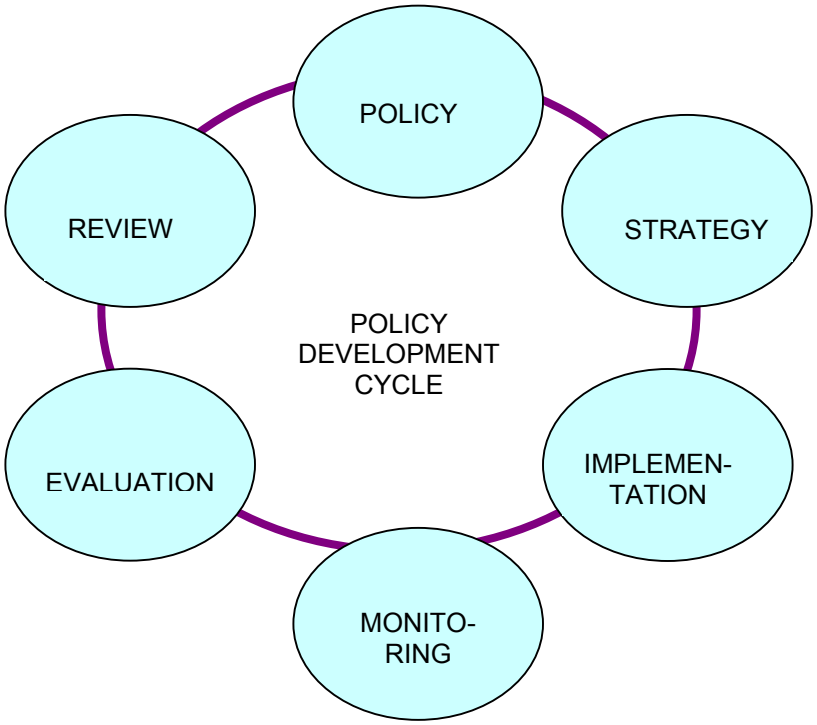
It is important to differentiate among data, processed data, statistics, indicators and indices. According to Auclair (1998:21-22) disaggregated raw data are

unprocessed numbers, and these are of little value for devising policy. Data that has been verified, classified and adjusted is considered processed data or statistics and can provide the basis for ad-hoc evaluations to help describe particular conditions and trends. Indicators are statistics selected specifically for their relevance to policy issues and which point toward successful outcomes for policy. Indices are at the highest level and combine different indicators into a single number useful for comparison over time and space.

In general, indicators are needed to help analysts understand complex phenomena and can contribute to reduce the level of uncertainty, enabling society to better define its priorities and urgencies (De Wel, 1995: 3). Indicators can be used for two main purposes: for planning, as they can identify problems, be useful to locate socio-economic resources and to analyse policies, programmes or projects; and for communication, as they can warn, put in place and legitimise political measures.

Due to their ability to clarify and synthesise problems and complex issues in a few numbers, indicators have become an increasingly common component of city management around the world (Auclair, 1998: 21).

However, it is not only through quantitative data that indicators can be defined, there is also a need to look at qualitative information to describe perceptions over time. Urban indicators are useful not only to assess human settlement conditions and sustainability, but also to assist in policy formulation and in monitoring overall urban performance (UNCHS, 1997).



As an example, the Policy Development Cycle shows the stages when indicators can become valuable. Policy begins with the development of a strategy and at this stage indicators should be developed to measure progress towards meeting policy objectives, and included within the strategy. When a policy is implemented, indicators should be used for monitoring the success of the strategy. Furthermore, indicators should be used in the evaluation phase to review the success of the strategy, and as new policies are developed. Finally, the indicators themselves should be reviewed (UNCHS, 1997).

However, identifying what types of indicators are relevant for a specific type of planning must be clarified. Some information is relevant at a global level, some at the regional, other at the national, provincial, city or local level. Depending on the area to be intervened different analysis of information must be made. In urban planning, some indicators measure the level of urban development taking place and these can call our attention to particular urban phenomena such as housing availability, infrastructure development, access to services, urban investment and productivity, urban security and pollution, amongst others. Other indicators are broader and measure sustainability, in terms of efficient use of resources or equity in their distribution, etc.

Quality of life indicators are not the same as sustainability indicators or urban indicators, although a specific quality of life can be studied in an urban area. Quality of Life indicators incorporate different aspects of life which individuals consider relevant to their quality of life. This is why the concept of quality of life is relevant, because it emphasises in the importance of the specificity of contexts and it is composed of an objective as well as a subjective aspect.

These concepts imply the need to evaluate how satisfied the different users and those affected are with their habitat and these can provide a criteria to design instruments in order to obtain direct, subjective and objective information which can be fed back to the planning process. (Fadda and Jiron, 1998).

Gender and Quality of Life

Today's planning process requires the use of alternatives that can capture the needs of those for whom it is being planned in order to be truly effective. This quality of life will depend on the possibilities people have to satisfy their fundamental needs (Max Neef, 1986). Therefore, the concept of *Quality of Life* represents more than the private "life standard" and it refers to all the elements of the conditions in which people live, that is, all their needs and their satisfiers

(Fadda et al, 1999). This concept has been developed by social scientists to measure and evaluate people's well-being[4].

Due to the fact that life quality is expressed in terms of well-being, happiness or satisfaction, it is necessarily **subjective**. Rapoport (1978) points out that the evaluation we make of the environment[5] involves more than a detailed interpretation of it, it is a global and affection reaction, which is strongly influenced by ideal images that are of a subjective nature. Although the concept of quality of life and environmental quality show considerable overlapping, they are not identical: there are elements of happiness that have their origin in the individual. There are people who are able to feel happy even in the worst environmental conditions, while others cannot be happy even in the best environmental conditions.

Human beings perceive problems and their possible solutions from different viewpoints or according to the social roles (including reproductive, productive community based and political roles)[6] they play and satisfy their needs under different criteria. The same physical object or a specific experience may be perceived differently by different persons.

By using gender and the environment to "see" quality of life, it becomes apparent that its perceptions vary depending on the gender relations taking place, the needs, roles, access and control over the resources men and women have and particularly over the decision-making capacity they also have. Men and women's entitlements on community based goods and services also have implications in terms of gender. It is thus important to understand who is entitled to what and on what basis and how this entitlement is perceived (Kabeer, 1997).

The inequalities in these relations do not usually emerge when analysing quality of life for various reasons including lack of practical expertise, lack of advocacy power, lack of methodologies or simple rejection. Although much work has been carried out to mainstream gender into policies, programmes and projects, it is still greatly misunderstood or conflated with other mainstream concerns such as poverty or the environment. Additionally, though most policies, programmes or projects have as their main objective to improve this quality, upon analysing the interventions, the concept is rarely defined and seldom are gender implications made visible. Although the need to incorporate the environment as well as gender to their formulation has also been considered essential to the urban planning process (SCP, 1998 and SPC, 1999).

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[4] See Nussman, M. and A. Sen, 1996

[5] Understanding that "environmental problems are not problems or our surroundings, but in their origins and through their consequences – are thoroughly social problems, problems of people, their history, their living conditions, their relations to the world and reality, their social, culture and living conditions... At the end of the twentieth century nature is society and society is also 'nature'" (Beck, 1992: 81 in Allen, 1999)

[6] For additional literature on this see: Moser, C. (1994) and Beall, J. (1993).

Sometimes, these interventions could contribute to overcome these inequalities if they consider that a poor quality of life does not affect everyone in a similar manner. Given that urban planning and management can help to improve the situation described above, the concept of *Quality of Life* can be a useful tool to study and evaluate the degree of well-being and equity of men and women living under specific circumstances. It can also serve to set up urban planning goals that aim at overcoming such critical situation.

Generally, the process of selecting variables for indicators of quality of life is based exclusively on experts' opinion. Using the research of "Quality of Life and Gender in Low-Income sectors in Santiago", this paper suggests a different way of generating these indicators, taking into consideration the objectivity as well as the subjectivity of the concept.

Gender and *Gendered* Indicators

An overview of the way gender has been included in the formulation of indicators is important to understand why "gendered" indicators can contribute to understanding quality of life. Until the 1970s, indicators were mostly economic based, related to GDP and national accounts, and this reflected the focus on economic growth and infrastructure development up to then. Since the 1970s and beginning of the 1980s, after the recognition that economic growth alone would not relieve poverty and that the development process had to concentrate on basic needs and human development, vast amount of literature on social indicators has become available. However, during that time, gender was not considered a relevant issue to look at (ACDI-SERNAM, 1998). At the end of the 80s and beginning of the 90s, after a strong influence from the Women in Development (WID[7]) approach from development agencies, great efforts were started to disaggregate data according to sex. This can be considered a great success, since today most information can be found disaggregated by sex and sometimes age.

The purpose of gender indicators is to "signal changes related to gender in society over time. Its usefulness is based on their ability to point to changes in the condition and on the roles of women and men over time, and thus to measure gender equity over time" (ACDI-SERNAM, 1997: 11). The creation of these indicators can greatly contribute to visualising inequities, however, they need to be used in the planning process to truly make a difference.

Over the last few years there has been a great effort to create 'gender indicators' which describe the situation of men and women and compare it. However, there is still some way to go in terms of indicators in urban areas as what usually has been done in gender indicators in most development agencies, has had following mayor problems:

[7] For further literature on this see Moser, (1993)

- Indicators have usually been designed by experts from developed countries. Sometimes these indicators are not pertinent to all contexts.
- Most gender indicators ask questions such as “Were women included in the planning of the project” as opposed to actual indicators which measure changes in women’s conditions. This reflected the need to go further than a measure of women’s attendance at certain stages of projects and to understand how or what the whole process implied to women’s condition.
- Because gender, like the environment, has become a ‘trend’ for some agencies, NGOs or government offices incorporate the dimension without fully understanding its implications. They sometimes create in-house gender indicators which measure how the funding is spent, i.e., how much has been allocated for gender projects, training and hiring of gender experts. There is a lack of indicators that evaluate the performance or impact of projects and programmes.
- Most work has been based on quantitative indicators more than on qualitative ones, mostly because these are easier to measure. Some people consider the former ‘truer’ than the former and perceptions and satisfaction of users and those affected by the externalities of the city are usually avoided.
- Often times there has only been information on women without comparing their situation to men’s or to other women of different ages, or different contexts, without much point of comparison.
- Lastly, most work has been centred on creating gender indicators changes on women’s conditions as opposed to ‘*gendered’* indicators. It must be acknowledged that gender indicators are essential and fundamental for measuring and comparing the progress that can be occurring in gender relations in a particular context. The argument towards ‘*gendered’* indicators is not in opposition to the former, but complementary. Gender aware indicators, are those which are conceived, measured, analysed and compared using a gender perspective.

‘*Gendered’* indicators of quality of life are those which are conceived using both objective and subjective information. This means that their definition, analysis and use need to be done using a gender perspective throughout this process. To incorporate this vision, they need both quantitative as well as qualitative methodologies in this process. It is sometimes said that qualitative indicators are subjective and cannot be trusted and therefore have little value. However, such indicators are essential to promote the participation of those involved in the project. (ACDI-SERNAM 1998). Quantitative indicators can measure quantity, for instance the number of persons who use the public transport system in a town. Whereas qualitative indicators can be defined as judgements and perceptions which persons have regarding a subject, for instance, the trust people have in the transport system in terms of safety and reliability.

Both types of indicators are complementary and both are important in evaluating and monitoring, programmes and projects. In other words, it is important to have

both types of indicators either to measure the same thing or to complement measures that one cannot reach.

Complementary to the importance of having quantitative and well as qualitative indicators, there is also the need for qualitative analysis of the information gathered, there must be an understanding of the context, the social relations, the history, the institutional framework, the way things are institutionalised.

Generating "*Gendered*" Indicators of Quality of Life at a Local Level

In Chilean local Municipalities, as in most local governments, it has been observed that, although they are considered the closest link to communities, they often generalise the diagnosis that affects only a sector of the community. Similarly, they do not often have access to information in a readily manner or particularly regarding how people perceive their environment. It is rare to find interventions that respond to people's needs, and even less those that respond to the different needs of the diverse groups in the community.

Recognising this deficiency and lack of methodological guidance, this paper suggests guidelines to formulate '*gendered*' indicators of quality of life, based on the previously mentioned research. Various aspects can be considered at the different stages of this formulation process including definition, data collection, data analysis and definition of indicators and its use.

Understanding that the notion of Quality of Life is so inclusive, covering great parts of individual's life, Sheer's (1980) recommends to reduce it to an operating level. Therefore, in the case of our research it has been delimited to urban areas and in particular to the urban environment at the neighbourhood level and to those aspects related to the surroundings of the housing unit.

At the stage of defining what aspects can be relevant to measure quality of life, expert's opinions are considered as important and relevant. However, if using a quality of life approach then different methodologies are needed to capture people's perceptions of what is important and relevant to their well being. Thus, as mentioned earlier, these aspects need to incorporate both objective and subjective methods to assess them.

In our case, we selected the Participatory Research approach (adapted from PRA, Participatory Rural Appraisal)[8]. This approach is defined as a family of methods used to enable persons to present, share and analyse their knowledge, experience of life and their conditions (IDSa, 1997). This knowledge generally differs from those that observers have in their role as "experts". This method was chosen

[8] For further detail on this methodology see IDSa, 1997 and IDSb, 1997

because it is flexible, participatory, adaptable, exploratory, enjoyable[9], iterative[10], inventive and empowering[11]. From the different methods used in this approach, those considered more relevant are the analysis of secondary sources, direct observation, conversations and interviews with key informants, meetings and group workshops and a survey.

Under this methodology the following aspects need to be considered:

- More than an exhaustive list of aspects relevant to men and women's quality of life, these aspects should capture those items that are both significantly different and significantly similar in men and women's perception. All are just as important to measure quality of life, however, the cause of the discrepancy in perception is relevant to assess how and what needs to be looked at differently;

- Although some work had been done on measuring quality of life, the aspects relevant for the study need to be defined according to the context where it is taking place, as these cannot be generalised even in the same city.

- Given the power relations taking place within a community, groups of men and women need to discuss separately the aspects relevant to their quality of life, and later on discussed together to see the points in common. The aim is not necessarily to reach a consensus on what the relevant aspects are, but to bring out in the discussion most of the aspects that are considered important to then be measured for frequency.

- In order to make this information useful to the local authorities, they should be informed, aware and eventually participate in the process taking place.

- Men and women's satisfaction requires to be assessed considering not only at the level of the heads of household's opinion but also the opinion of different age groups within the same household.

As detailed in the definition of quality of life, measuring this quality requires the use of objective as well as subjective indicators. The data related to the "objective indicators" can be obtained from various sources including publications on the matter as well as data from public offices such as: municipalities, Health Services, Ministries, Environment Commission, private and public services, amongst others.
Using this information as base, and knowing the difference between what "experts" may define as Quality of Life and the perception which the persons in this specific context have, according to their gender relations may perceive, group discussions can be used to measure the subjective aspects of quality of life. Based on the

[9] Since it uses games and techniques which make the observation activities fun.
[10] Where research is understood a process which feedback information, is possible to be modified and checked as many times as necessary.
[11] Understood as a way in which the member of civil society, from inside, can make their own decisions and control their lives.

experience of participatory research, different activities can be designed as workshops (see text box).

Once this information is processed, it needs then be analysed. The point of analysing the information can be the most tedious and repetitive, however, it is one of the most important ones, and the point where gender spectacles are specially needed. The objective information can usually be found relevant for different scales and measured at different times and for various purposes. The process of "cleaning" the relevant information can be difficult. One of the easiest ways of visualising it is via geographic information systems to map the information. This information can give a general view of the important aspects that need to be considered and contrasted. For instance, in our case study, the quality of air in the area of study was measured as being the worse of the city throughout the year. However, when contrasted to the perceptions, security, drug abuse and transportation were considered the most important aspects that affect a poor quality of life for the residents.

Because most objective information is not disaggregated by sex, it needs to be compared with the subjective perceptions of men and women. If using a survey, the overall results need to be analysed to find the points where aspects of quality of life are considered very satisfied or not satisfied at all, very good or very bad, very significant or not significant at all. These results need then

In the research "Quality of Life and Gender in Low-income areas in Santiago", three different workshops were held. The first consisted of the making of cognitive plans by the participants who were separated in two groups: men and women. These maps were meant to identify, analyse and discuss the places were the residents frequently go and classify as influential of their quality of life giving meaning to the different problem and conflict spaces. Simultaneously, the relevance of each spot was discussed in terms of their daily life.

In the second activity, "The Organisation Game", separate groups of men and women were made. The aim of the game was to distinguish central aspects at a historic and cultural level of the organisation according of the personal experience and knowledge of the sector.

After systematising the information from the previous one, the third activity was held. "The Organisation Roulette" was played and men and women were joined in three groups for this exercise. The objective of the game was to identify situations that the participants considered relevant, in terms of their Quality of Life, in their sector, such as analysing the problems which affect the sector and seek causes which provoke it.

From the discussions in the workshops, the elements which the participants considered that mostly affected their Quality of Life were identified. This material was used to design a survey to measure the frequency of these elements of Quality of Life for the residents

The questionnaire of the survey was set in terms of the differential use and requirements between men and women of different ages and their gender roles. This required of specific forms to set the questions, to evaluate the level of satisfaction, conformity, happiness, etc. in terms of their habitat. The elements to inquire included: socio-demographic characteristics; previous housing, characteristics and perception of current housing; perception of the housing unit and the neighbourhood (location, equipment and services); community environment (protection, participation, social environment); final balance (possibilities of election, identity, advantages, problems and priorities); and income.

be cross-examined with the different perceptions of men and women, and furthermore by the different age groups selected. Using a correlation analysis, the most significant variables representing good or bad quality of life can then been selected.

These results need then to feedback to the community of interest. This implies that the analysis can be carried out in the field in a participatory manner via triangulation. The triangulation, that is, the use of different sources and methods of obtaining information, is one of the most important aspects of the participatory analysis. This participatory analysis should also include various workshops and discussions groups where men and women, including different age groups, can discuss these results separately as well as jointly. When the triangulation reveals an inconsistency of information, it means that point should be looked into deeper in a participatory way and possibly linked directly to the resource problems and the opportunities for solution. This information can also be useful to monitor and evaluate activities and services (IDSa, 1997).

This triangulation of information would then lead to a proper definition of the quality of life indicators relevant for a specific group being studied, according to the gender relations taking place.

The formulation of *gendered* indicators of quality of life can be useful for the development of appropriate policies, programmes and projects. This is because they are conceived in a participatory manner, using local stakeholder as experts, and also because they can bring awareness that people's needs are diverse and that homogeneous solutions will not only be insufficient but inequitable. These types of indicators give relevance to the work local governments can have at a community level. A conjugation of what different groups of interest perceive as priority in a specific sector can contribute to the measures to be taken. If gender is used constantly to identify these priorities, then its use alongside an iterative planning process will most likely become more effective. If *gendered* indicators can contribute to considering a needs assessment instead of possible solutions beforehand, then this makes gender relevant throughout the planning process and not only and extra addition at the end of this process.

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