WOMEN AND DEVELOPMENT

CO-OPERATION WITH LATIN AMERICAN, ASIAN AND MEDITERRANEAN COUNTRIES. MANAGEMENT OF THE PROJECT CYCLE

COMMISSION OF THE EUROPEAN COMMUNITIES

Commission of the European Communities

WOMEN AND DEVELOPMENT

A GUIDE TO GENDER ISSUES
IN MANAGING
EUROPEAN COMMUNITY
CO-OPERATION WITH
LATIN AMERICAN, ASIAN AND
MEDITERRANEAN COUNTRIES

1993

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FOREWORD

FOREWORD

This technical guide to the integration of women in development forms part of the implementation of our cooperation policy with the countries of ***Latin America, Asia and the Mediterranean Basin (ALA/MED),*** *and its publication is a great source of satisfaction to me.*

This document is the logical continuation of the work started by the Commission a long time ago, in the field of development cooperation with countries in ***Africa, the Caribbean and the Pacific (ACP),*** *which led in 1991 to the publication of a manual aimed at taking more account of the role of women in the projects and programmes carried out under* ***LOME IV.***

This represents a further step by the Commission in the overall implementation of Community policy on the theme of "Women and Development". The ultimate objective of this work is that women should be involved in all the processes of development, on an equal footing with men.

The Commission's policy is centred on respect for women's fundamental rights and freedoms, which is a vital condition for economic development and for the consolidation of democracy.

This requires us to make a determined and continuous effort. The way to achieve our objectives will depend on the socio-cultural, economic and institutional context in each country. Nevertheless, experience has shown us that there are methods and general rules which can and must be applied in our cooperation programmes.

The implementation of Community policy on the theme of "Women and Development" implies the revision of traditional working methods by a large proportion of professionals working in development, both in the Community and in the developing countries. In order to promote women's involvement it is necessary to carry out specific analyses at every stage on the project cycle. This methodology is intended to meet the practical and strategic needs of women in all projects.

This guide has been produced as part of the overall Commission strategy, aimed at increasing the ability of its personnel to deal effectively with the gender-linked obstacles which women encounter in countries receiving aid. This implies that specific procedures will be established to guarantee a suitable examination of impact according to gender, in all our cooperation projects and programmes.

This document and the procedures set out in it are not intended as a definitive response to the issue, but they will enable us to deal in a systematic and uniform way with the integration of women in our cooperation programme with developing countries.

Manuel Marin
Vice-President of the Commission
Brussels, September 1993

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ABBREVIATIONS

AID	Agency for International Development
ALA/MED	Asia and Latin America/the Mediterranean
APV	Agricultural Productivity Villages
CECAP	Central Cordillera Agricultural Programme
CIDA	Canadian International Development Agency
DAC	Development Assistance Committee
DANIDA	Danish International Development Agency
DG	Directorate General
EC	European Community
ESAMI	Eastern and Southern African Management Institute
FAO	Food and Agriculture Organisation
GAD	Gender and Development
GOPP	Goal Oriented Project Planning
GTZ	Organization for Technical Cooperation (German)
HRD	Human Resource Development
ICAS	Institutional Capacity Assessment System
ICD	Institutional Capacity Deficits
IDA	Institut pour le Développement Agricole (Institute for Agricultural Development)
ILO	International Labour Organisation
ISSAS	Institute of Social Studies Advisory Services
IWTC	International Women's Tribune Centre
MECU	Millions European Currency Unit
NGO	Non Governmental Organisation
NORAD	Norwegian Agency for Development
ODA	Overseas Development Administration (British)
OECD	Organisation for Economic Cooperation and Development
SADCC	Southern African Development Cooperation Committee
SMAP	Southern Mindanao Agricultural Programme
UNDP	United Nations Development Programme
UNICEF	United Nations Children Fund
UNIFEM	United Nations Development Fund for Women
USAID	United States Agency for International Development
WID	Women in Development

INTRODUCTION

INTRODUCTION

Almost every year from 1982 onwards, the Commission has presented an action programme to the Council on the integration of women in development. These action programmes have led to the creation of a manual which takes into account socio-economic relations between women and men in projects and programmes such as LOME IV.

The Council of Ministers of the European Community requested the Commission to complete and pursue its programme for the integration of women in development (WID) in the framework of European Community cooperation with Asia, Latin America and the Mediterranean Basin (known as ALA/MED cooperation).

This Guide develops the concepts and tools for making clear distinctions between the different roles and responsibilities of men and women and their varying needs and interests, in projects and programmes specific to ALA/MED cooperation.

The procedures included in this guide complement the existing "Guide for management of financial and technical assistance and economic cooperation with the developing countries of Asia and Latin America (ALA) and the Mediterranean", afterwards called the "ALA/MED Management Guide".

The procedures specify where and how the participation and integration of gender - and particularly of women in development can be included in the "integrated approach" to project cycle management, a methodology developed in the framework of ALA/MED Cooperation since February 1991. This approach uses the Logical Framework, or Conceptual Framework, as the basis for gender-conscious planning and management of projects and programmes. Annex IV contains questions which have been specifically developed to check the gender sensitivity of information included in the Logical Framework.

The Gender/WID Impact Assessment Form, of which an example is included in Annex V, will enable officials of the Commission of the European Communities to monitor the participation and integration of women at the same level as men in the projects and programmes for which they are responsible, as well as the potential effects of these activities on their respective roles and responsibilities. The Form is to be completed by the consultants responsible for missions in the field, and is to be used at various stages of the project cycle. It adopts the WID criteria laid down by the Development Assistance Committee (DAC) of the OECD.

Purpose and Content of this Guide

This Guide is intended for:

- Personnel from Headquarters, and from Commission delegations responsible for cooperation with ALA/MED countries
- ALA and MED officials involved in the negotiation and execution of EC-financed projects
- External consultants and other entities, such as NGOs, involved in the preparation of proposals and execution of projects financed by the EC.

The purpose of the Guide is to assist staff of the Commission in implementing the European Community's objectives of integrating women as full participants and beneficiaries in all stages of the project cycle, at the same level as men, and of implementing strategies for achieving a positive impact on both sexes. Accordingly it deals with:

- Gender/WID in the Logical Framework
- the various stages of the project cycle, indicating how to integrate gender considerations into each stage
- key sectoral topics (see list of Box texts, page 13) important for the understanding of gender issues.

The Guide refers to the Thematic Evaluations performed in 1992 in six developing countries of the ALA/MED regions, to illustrate both positive and negative aspects of the current approach to gender in projects. Examples are also drawn from other sources. These examples help to identify how development assistance can either assist, or hinder, a gender-sensitive development process.

1 BACKGROUND

1.1 The Position of the Council of Ministers on Women in Development

1.2 The Position of the European Parliament

1.3 The Political Implications of Gender in Development (GID) and of integrating women in development (WID)

1.4 The Commission Action Programme

1.5 The Global WID Approach

Position of the Commission and of the European Parliament on WID. The aims of the Council as stated in its Conclusions. Explanation of Gender in Development (GID), and Women in Development (WID). The Gender/WID action programme and the Gender/WID approach.

1.1 The Position of the Council of Ministers on Women in Development

The Council of Ministers of the European Community has progressively defined its position on Women in Development (WID). The most important Conclusions are those of 8 January 1982, 4 November 1985, 17 April 1986, 9 November 1987, 16 May 1989 and 25 May 1990.

The current policy framework for development aid and economic cooperation with Asian and Latin American countries is defined in Council Regulation (EEC) 443/92 of 25 February 1992. This Regulation stipulates that the aim of the European Community's development and cooperation policies shall be human development. Article 5 deals particulary with the position and role of women.

This article stipulates that:
"Care should be taken to ensure not only that the changes brought in by the projects and programmes do not have any detrimental effects on the position and role of women, but that, on the contrary, specific measures, or even projects, are adopted to increase their active participation, on an equal footing, in the productive process and its results, and in social activities and decision making".

In relation to cooperation with the Mediterranean countries, the Declaration of the Council of Ministers in 1990 recalls the general principles of Community development cooperation policy, including the objectives of sustained and harmonious development, appropriate management of the environment, the realisation of human potential and the role of women in the development process.

The Council of Ministers also attaches great importance to the demographic dimension of development and its impact on women.

"Bearing in mind the links between the status of women, their level of education and the number of children per family, the Community will pay special attention to programmes aimed at improving women's education and training, their income-generating capacity and their access to health care."
(Conclusion of the Council of Ministers, November 1986.)

Care for the integration of women into the development process is entirely in keeping with the emphasis of the European Community on development of, for and by local people. But this concern for women must be situated in the broader context of a strategy aimed at improving the lives of both men and women, through identifying their respective roles, responsibilities and opportunities in their societies (the concept of gender-integrated development).

1.2 The Position of the European Parliament

Over the years the European Parliament has taken a particular interest in women and children in developing countries. In this respect, conclusion A3-0146/92 is of particular relevance. In this conclusion, the European Parliament considers that women must play an active role in the creation of democratic, political and economic structures. The Parliament asks developing countries to ensure that women are able to exercise their rights of association.

The conclusion concentrates on the following suggestions to the Commission:

- European Community development cooperation should give women more opportunities to define their priorities and to take part in the design, the implementation and the evaluation of projects.
- Financing proposals should include information on the position of women with regard to land ownership, access to credit and to extension services, as well as the main source of their income and their influence on the decision-making process.
- The Commission should encourage developing countries to strengthen the rights of women, especially regarding their access to ownership of land.
- Gender differentiated statistics should be gathered in the fields of work, education and health, since they are essential to the work of development planners.

- European Community delegations in the developing countries should establish more contacts with organisations representing women and with national organisations.
- Technical assistance teams should include experts on the issue of women in development.

1.3 The Political implications of Gender/WID

The main implications of the Council and the European Parliament's conclusions on gender in development (GID) and on the integration of women in development (WID) are summarised below.

1. Recognition of the need to improve women's participation in the development process and their integration into all relevant phases of the project by taking them into account as producers and as beneficiaries.

2. Differentiation by sex of statistical data on Community-financed projects is requested.
The realisation of the Nairobi Forward Looking Strategies is accepted as a priority issue, necessitating support for the statistical and political monitoring mechanisms contained in the strategy.

3. The EC should strive, through special efforts, to succeed in getting recipient partners to associate the women of their country more closely in the planning, implementation and evaluation of projects.
Documents such as financing proposals, progress and monitoring reports and evaluation reports should include specific information on the effects of the project for women and on the integration of women into project activities.
If special WID activities are necessary, they should be integrated into each project, identified and defined through consultation with the women involved
The necessary funding for these special WID activities should be provided in the financing proposal.

4. There should be continued recognition and support for the vital role of women in rural development, but increasing emphasis should be placed on the need also to pay attention to women's role in urban areas, health, the informal sector and in demographics.

5. The Commission should develop action plans for WID in ALA/MED Cooperation on the basis of the content of the "Action plan for the implementation of the WID dimension in the Fourth Lomé Convention".

1.4 The Commission Action Programme

The Commission has responded to the Council Conclusions and to the European Parliament's interest in WID in ALA/MED cooperation, by implementing a Gender/WID action programme (1991), taking into account the experience already gained in cooperation with the ACP countries.

The Commission considers that a more deliberate and sustained effort is required to ensure that the role of women is fully taken into account in the integrated projects financed by the Community in ALA/MED countries.

Such an effort should recognise the importance of women's productive role and their contribution to economic, demographic and social development. It should enable women to improve their own living conditions and to contribute to a greater degree of economic growth, to the alleviation of poverty and to the well-being of society, and a reduction in demographic growth.

Action programme for women's participation and integration in development at the same level as men

Implementation of the gender / WID action programme will enable Commission staff and external consultants to manage the gender / WID dimension in their respective areas of responsibility.

The procedures contained in this Guide will allow monitoring of:

- The integration of gender questions into the project cycle
- Women's participation in all projects and programmes, using the criteria developed by the OECD-DAC (Organisation for Economic Co-Operation and Development - Development Assistance Committee). These criteria are set out on page 27.

The information on gender / WID supplied by Commission staff should facilitate:

- Managing economic co-operation and technical or financial development assistance
- Commission reporting to the Council of Ministers and to the European Parliament on gender / WID aspects
- Statistical reporting to the OECD-DAC on the extent of women's integration into Community - financed development assistance programmes.

1.5 The Global WID Approach

As previously mentioned, the issue of "Women in Development" (WID) must be placed in the broader context of "Gender in Development" (GID).

The WID approach

The WID approach promotes women in development efforts (projects specifically for women or integrated projects). The focus is entirely centred on women.

The Gender in Development or Gender-integrated development (GID) approach

The GID approach concentrates on the difference between men's and women's roles, responsibilities, opportunities, and expectations in relation to development efforts. This perspective is gradually replacing the WID approach. Here, the emphasis is placed on relations between the different players, at local level.

The reason for focusing on the different roles, responsibilities and expectations of men and women in society in general and in different cultures, is that these factors affect the ability and incentive of men and women to participate in development projects and lead to a different project impact for men and for women.

Special attention for "Women in Development", within the context of gender, is still necessary. Women face specific constraints of their own due to their legal status and socio-cultural position. In most societies women are not yet accorded equal status with men. Women perform reproductive work and household management; productive work (often as the bread-winner); and community management work. The burden of this triple role in society affects their capacity to participate on equal terms and conditions with men in the development process.

The consequences of these facts for women tend to be underestimated, as data on women, at macro and even at micro level, are frequently more "hidden" or intractable than data on men.

The approach of the Commission of European Communities

The Commission concentrates on integrating gender issues in the development process, while paying special attention to the integration of women at the same level as men in all aspects of the project. The Commission wants to avoid the adverse effects of certain projects for women.

Concentration on gender integration does not mean that particular efforts should not be made to create projects specifically for women.

The Development Assistance Committee of the OECD speaks of integrated (or, in the terms of the Commission of the European Communities, gender - integrated development) projects when:
"Women are specifically identified as part of the target group (as agents and beneficiaries) in all of the main components of the project; if not, it is clearly stated why they do not form part of each component".

Example of a Women-Specific Project and a Women-Integrated Project

1 ***Example of a Specific Project:***
Employment Creation for Women in Rural Areas

The project aims to create jobs for rural women. The idea for the project and its design developed mainly from discussions with women, who were brought together specially for this purpose in a rural female workers' camp. The project (and in particular the training team) will be staffed by both men and women. The project is being implemented by a research centre established in the relevant country to study the participation of women in development: skills in the field of women in development are available. A major obstacle faced by rural women is obtaining information on and access to funds allocated to an existing government project targeting tribes and other village populations. A study has been made of strategies to enable women to benefit from these resources, e.g. creation and membership of organisations, and special training. The target group is composed mainly of rural women. This project is specifically aimed at the participation of women in development. *Source: OECD/DAC, 1990.*

2 ***Example of an Integrated Project:***
Small-Scale Irrigation Project in India

During phase I of a small irrigation project in India, hardly any attention was paid to the situation of women. The evaluation mission included two women (one Indian, one Dutch), who consulted the women in the project area. The proposal for Phase II states that women will be represented on water users committees, and that some women will be called upon to act as village agricultural extension agents in each of the 27 sectors of the project area. In addition, a woman will be appointed to the consultative committee to advise on ways to promote women in the framework of the project.

A major obstacle to women's participation in Phase I was the fact that they were not visible; those running the project were not aware of their needs or interests. Consequently, no attention was given to their training needs, to the location of the wells, or to monitoring and evaluation of changes within the household resulting from the introduction of the irrigation system.

Phase II will include training programmes for rural women in livestock, fuel supply, and fruit and vegetable cultivation, including marketing aspects, as these activities are to a large degree - if not entirely - the responsibility of women. Studies and research will be undertaken to analyse the impact of small-scale irrigation on women's work and situation, and to establish monitoring and evaluation at the household level. One of the members of the project consultative committee will be responsible for issues related to women's participation in development. In addition, the Netherlands Embassy's women in development specialist will be involved in project monitoring.

In this project, women are specifically identified as a part of the target group for various irrigation-related activities (special training programmes, objectives concerning women in other training programmes, women's participation in setting up hand-pumps, representation on special water users' committees).

As Phase II fulfils all the necessary criteria, this will be classed as an integrated project, and total disbursements allocated to phase II (approx. US$10 million) will thus be posted under integrated projects. *Source: OECD/DAC, 1990*

The Commission monitoring instruments focus on the nature and quality of gender integration and of women's integration into the project cycle.

- Improved attention to Gender in Development (GID) will become apparent in gender-sensitive management of the project cycle (from design to evaluation) utilising a gender-sensitive Logical Framework.

- To evaluate the projects' attention to WID, use is made of the OECD/DAC criteria specifically developed to measure the participation of women in development projects (see page).

Management of the Project Cycle
The gender-sensitive approach requires insight into the relations between women and men in society, taking into account the division of labour, and the socio-cultural constraints in each country relating to access to, and control over, the benefits of projects.

Because men and women have different roles they also have different needs.

- Practical gender needs are the needs of women and men related to their existing roles in society, in other words: what people need to do their current jobs more easily or efficiently. Projects can be designed to meet practical gender needs without necessarily making any impact on the relation between men and women in society.

- Strategic gender needs concern the need - for women particularly - to achieve more equal status through changes in their own roles, responsibilities and decision-making capacities in their society.

3 *Gender Roles and Needs*

Gender roles
In India, unskilled construction work is accepted as 'women's work', while in parts of Africa and Latin America it is identified as 'men's work'. In most developing countries there is a broad pattern of men having a single productive role while women have dual roles - productive and domestic (or reproductive). Women's productive role is often undervalued or given little recognition. Roles can change over time: in Europe and North America men's role in domestic activities is becoming increasingly important.

Gender needs
Because men and women have different gender roles, they also have different needs.

Activities which address practical needs of women include:
- *reducing their workload; e.g. stand-pipes and hand-pumps, grinding mills, ox carts*
- *improving their health; e.g. trained village midwives, primary health centres, child spacing/family planning advice, clean water supply*
- *obtaining improved services for their families; e.g. immunisation, primary schools, inputs for food crop production, housing*
- *increasing incomes; e.g. credit groups, skills training, access to markets.*

Activities which address strategic needs of women include:
- *improving education opportunities; e.g. hostels for female students, gender neutral textbooks, female teachers as role models, literacy classes, overseas fellowships*
- *improving access to productive assets; e.g. rights to agricultural land, rights to common property (trees, ponds, etc.), bank accounts*
- *improving participation in decision making; e.g. committee membership, participation in elections, managerial positions, establishing and supporting women's groups*
- *gaining equal opportunity for employment; e.g. jobs traditionally reserved for men are opened to women, equal wages even if there is a gender division of labour.* Source: ODA, London

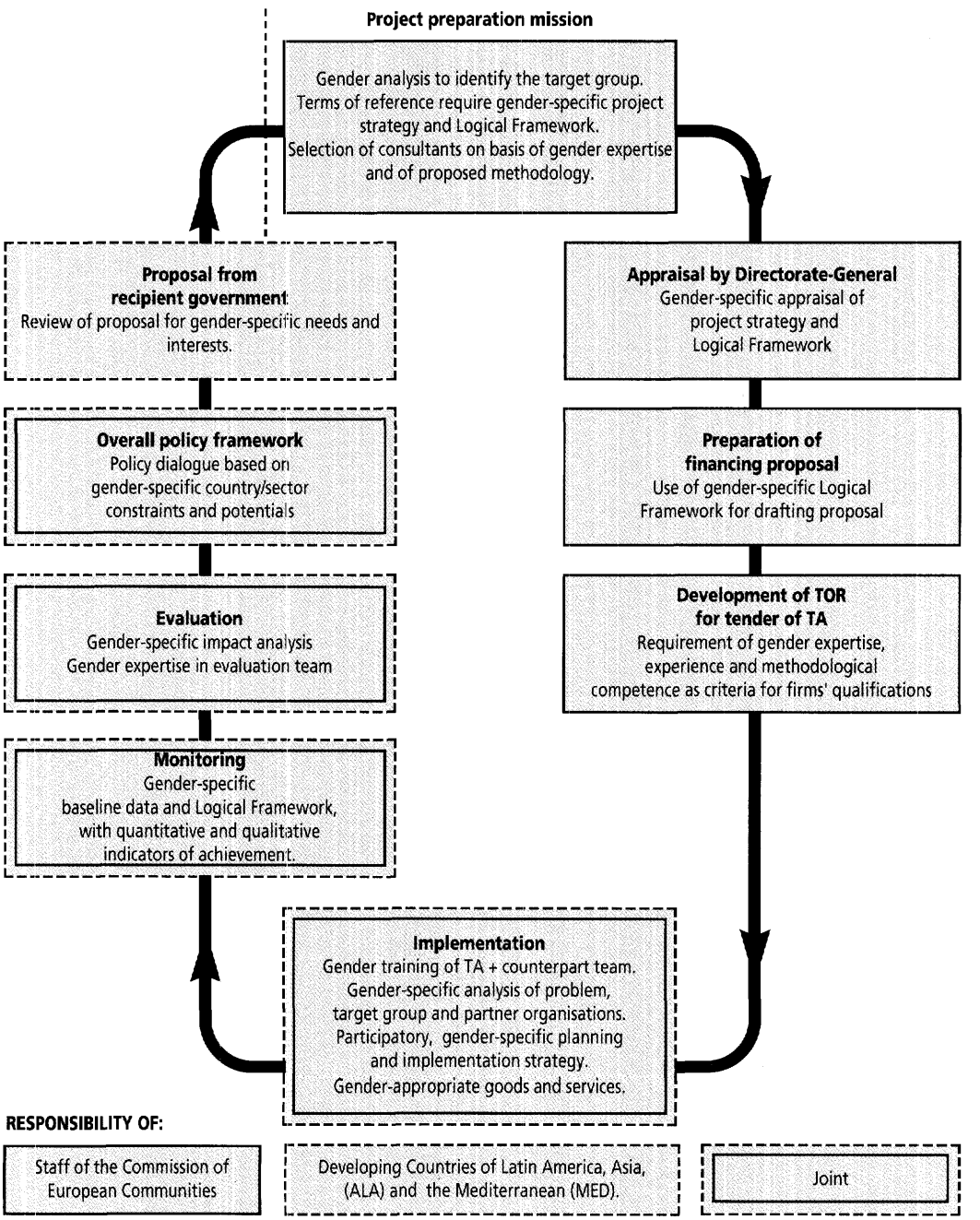
The Conclusions of the Council of Ministers and the European Parliament emphasise the need to improve women's status. This implies that action is required, not only regarding the practical needs of women, but equally that attention should be given to their strategic needs.

The ALA/MED Management Guide presents a set of management systems and procedures for better management of the project cycle (Section 7) to improve project sustainability. The various steps in this cycle provide ample opportunity for considering human potential in development aid and particularly the Gender/WID distinction.

Such an approach is possible if staff of the Commission, external consultants and partner organisations pay attention to Gender/WID during:

- the formulation of the overall policy framework of cooperation with a specific country
- the project identification/preparation stage
- the financing proposal
- project implementation
- project monitoring and evaluation.

4 Actions for Integrating Gender into Key Steps of the ALA/MED Project Cycle



Measuring the Participation of Women

The following four criteria, established by the Development Assistance Committee (DAC) of the Organisation for Economic Cooperation and Development (OECD) indicate what is expected from the nature and quality of the participation of women in projects.

1. The needs and interests of women are included in the project design at the same level as those of men, either through direct consultation, through consultations with local Gender/WID experts, or by reference to documentation which reflects the women's views.

2. Women from the target group are active participants during project implementation.

3. Constraints to women's participation in the project are identified, and conditions (including financial conditions) are created in order to enhance the quality of women's participation.

4. WID expertise is planned, budgeted and utilised throughout the project cycle.

In order to measure women's participation according to these four precise criteria, project descriptions must specify:

- Methods for consulting the women from the target population. Consultation can take various forms, such as direct consultation of the women themselves, or the involvement of Gender/WID experts, or consultation of documentation.

- How the active participation of women will take place. Active participants are defined as those who have access to and control over project activities and resources, give advice, or interact with trainers, managers, extension agents and/or consultants.

- The obstacles to participation of women in the project. Special measures to overcome these obstacles should be determined. This requires examination of the division of labour, access to and control over resources and benefits, and ability to participate in decision-making. It may be hard to identify all constraints at this early stage, but flexibility in time planning and budget will facilitate proper attention to this criterion later on in the project.

- How Gender/WID expertise, required throughout the project cycle to guarantee the integrated participation of women, will be obtained. This includes information on how and when this will take place and on budgetary implications: e.g. gender training for the whole team, recruitment of permanent project staff with gender expertise and/or short-term national or international WID specialists.

The nature of gender integration in various stages of the project cycle is discussed in Chapters 2, 3 and 4.

2 GENDER/WID APPROACH TO THE LOGICAL FRAMEWORK

Checklist for Gender sensitivity in the Logical Framework

2.1 Gender/WID in Project Planning

2.1.1 Gender-Specific Analysis of Problems
2.1.2 Agreement on Objectives
2.1.3 Interest Groups and Institutions
2.1.4 Participatory Consultation Process
2.1.5 Indicators for Monitoring

2.2 Gender/WID in the Various Elements of the Logical Framework

2.2.1 Immediate Objectives
2.2.2 Outputs
2.2.3 Inputs
2.2.4 The Indicators of Achievement
2.2.5 The Means of Verification
2.2.6 Assumptions, Risks and Conditions

GENDER/WID APPROACH TO THE LOGICAL FRAMEWORK

Advantages of incorporating the Gender/WID approach in the Logical Framework. How to adapt the Logical Framework to take into account gender roles and needs. The use of gender analysis to incorporate Gender/WID in project planning. The participatory approach.

The integrated approach to project cycle management uses the Logical Framework as a tool to structure the key components of a project in a clear and logical fashion. This, as well as the purpose and content of the Logical Framework, is explained in the ALA/MED Management Guide (Section 3). The logical approach underlying the Logical Framework should be applied from the time a project is first considered and should be based on a clear analysis of the problem and of the target group. It should continue to be used throughout the project cycle in the approval/appraisal, monitoring, implementation, project completion and ex-post evaluation stages.

Gender/WID Approach

A Gender/WID approach systematically considers the roles and responsibilities of men and women, and the way in which these elements positively and negatively affect the capacity of each to participate in the project under consideration. The approach should lead to a strategy to overcome barriers to both women's and men's participation in the project, and to take advantage of opportunities for their inclusion in activities.

The strategy requires detailed information on the position of women and men. Very often WID-related difficulties result from the fact that women are not explicitly identified as a target group in the target population. The consequences are that objectives and outputs and inputs are planned without specific attention for the practical and strategic needs of women.

'Visibility' is the starting point for integrating women into development projects. Visibility is achieved by collecting data which are desegregated by sex. Projects with this type of data have the information required for an understanding of the relative positions of women and men. This understanding facilitates effective and efficient targeting of services to men and women, according to practical and strategic needs.

Gender Analysis

Gender Analysis is a tool for articulating gender-based differences in roles and responsibilities.

6 *Basic Questions Underlying Gender Analysis*

- *Activity profile based on gender division of labour*
  Who does what in fisheries? Who does what in animal raising? How interchangeable are male and female tasks? How does women's workload compare with that of men?
- *Time allocation analysis*
  How is available time (per day, per season, per year) divided over various activities? Is there a time stress? Are there major bottlenecks, and if so, what are they? How can the changes envisaged by the project be realised?
- *Access and control profile*
  How is access/control determined? Who has access, who has control? What changes are brought about by e.g. the introduction of commercial vegetable-growing, the promotion of labour-intensive cultivation techniques?
- *Cost/benefit analysis*
  Who provides the inputs? Are they commensurate with benefits? Are benefits offset by disadvantages elsewhere? What is the social cost of participation? (see Box 7).
- *Decision-making*
  Who takes part in decision-making bodies, who does not? Are women structurally excluded or is exclusion a result of actual practice? What other ways do women have to influence decision-making?

QUESTIONS TO CHECK THE GENDER SENSITIVITY OF A LOGICAL FRAMEWORK MATRIX

Project structure	Indicators of achievement
WIDER OBJECTIVES Are wider objectives addressing problems of men and women? Does the choice of specific objectives influence relations between men and women?	**WIDER OBJECTIVES** Consistency check with the gender-specific policies of government or of relevant organised groups. To what extent are wider problems addressed gender-specifically at the policy or institutional levels?
OBJECTIVES Do the objectives distinguish between men and women in specifying WHO is targeted and WHO is expected to benefit? Who participated in choosing from the variety of needs to be addressed? What practical and strategic needs of men and of women are addressed by the project?	**OBJECTIVES** In qualitative and quantitative indicators: What improvements and changes are expected for women and men? Who is expected to benefit, in terms of gender division of labour and access to and control over resources gained? Were these indicators defined with participation of target group? To what extent will improvements and changes affect gender relations?
OUTPUTS Are the outputs specified separately for men and women? Are they consistent with the needs of the groups specified?	**OUTPUTS** What has been achieved for men and for women in terms of: • use of appropriate technology? • adequate policy measures supporting the project? • environmental protection measures? • building up institutional and management capabilities? WHO (men and/or women, age, class, ethnic background) benefited in reaching each of the outputs? TO WHAT EXTENT, IN WHAT CAPACITY did men and women participate?
INPUTS Are the inputs appropriate to the involvement of both men and women? Is there time and a budget for participation and for gender analysis? Are budgets flexible and reviewable, and has time-planning provided for the possibility of new activities in response to women's constraints? Has local gender and training expertise been used to the maximum extent possible?	**INPUTS** How accessible and appropriate are project goods, services and facilities for men and women? Are contingencies provided for in work plan and budget? Is provision made for participatory monitoring and evaluation? What resources have been devoted to addressing women's strategic needs?

How indicators can be assessed	Assumptions, risks and conditions
WIDER OBJECTIVES Will participants organised at national level be able to provide data? What alternative data resources can be used to check consistency?	**WIDER OBJECTIVES** Do the policy framework and legislative climate support the participation of both men and women in reaching objectives? Is the political climate favourable to a participatory approach? Is the policy and institutional context supportive of activities in the sector addressed by the project?
OBJECTIVES Was a gender analysis carried out in time to serve as a basis for targeting of activities? Is a strategy set out to tackle constraints? Are participants' views on impact considered in mid-term and/or final evaluations?	**OBJECTIVES** Are the objectives supported by policies? By other activities nationally or regionally, which will complement or endanger the planned improvements? Have these been taken into account or linkages provided for?
OUTPUTS Do progress, technical, monitoring and evaluation reports include gender-specific qualitative as well as quantitative data?	**OUTPUTS** Is the social or political status of men and women in the target group such that their interests pose a threat to gender-specific project outputs? Is there sufficient motivation, skills and organisational capacity among target group and partner organisations to encourage and participate in gender-sensitive project activities?
INPUTS Are participants consulted (men and women separately) on the appropriateness of inputs during monitoring visits, staff meetings, auto-evaluations, mid-term and final evaluations?	**INPUTS** Is the participation plan reasonable in terms of local constraints (seasonal, cultural, gender-related, financial, other) which might reduce women's agreement or ability to participate or affect their confidence? Can the project help them to participate? Is gender expertise adequate and is it used early enough?

7 Cost / Benefit Analysis

A gender-specific cost/benefit analysis ensures that women's labour is rated as a scarce economic resource and is duly considered in trade-offs which women are prepared to make.

For instance, the Thematic Evaluation mission to the Philippines (1992:50) obtained data from women's groups engaged in cattle and pig fattening and in meat processing. These data indicate that the activities lead to a considerable extra burden for women (up to three hours a day). The women kept time utilisation charts before and after the innovation was made. They were aware of the result, but considered that the extra effort was more than compensated by the extra revenues.

T'boli women had replaced their water carrying with vegetable cultivation on reclaimed land. This involved extra time and reduced the time available for weaving. The women considered that the changes in their labour inputs were justified by the profits they were obtaining.

Cost / benefit analysis within a household

Many projects are planned with the household unit as the target group. The household is seen as a homogeneous unit and it is assumed that all members of the household will benefit equally from the project. This is not correct. One group may benefit at the expense of other groups. Failure to recognize differences between men and women in control over resources, income and expected expenditure patterns can have serious consequences for the expected results of a project.

For instance, in a reforestation project in India involving a number of local communities, a foreign donor was to supply free tree seedlings to each family in the community, in return for which they were to plant and care for the young trees. Consultation with village leaders (all male), led to the decision to plant fruit trees. The assumption was that families would benefit from the income from sale of the fruit. However, men are the traditional owners of fruit trees and their yields. Women have claims to fodder-yielding trees so that they can feed livestock. The project resulted in women having to look after the trees, and men retaining the income from the fruit. This income was spent on personal consumption (beer, radios, bicycles) rather than on family needs.

Advantages of Incorporating Gender/WID in the Logical Framework

The Gender/WID approach must form part of the Logical Framework right from the start of the project cycle. The incorporation of a Gender/WID approach in the Logical Framework should increase project efficiency, sustainability and effectiveness because it should improve the capacity of the project to respond to the needs of both the men and women in the target group.

Questions for checking the gender-sensitivity of a Logical Framework Matrix are presented on page 32 and in Annex IV.

2.1 Gender/WID in Project Planning

The application of the Logical Framework requires an analysis of the problem and of the target group, which should therefore be integrated into the project planning process. This analysis will provide information for determining the nature and extent of men's and women's participation in the project.

Elements of Participatory Project Planning

- Problem analysis
- Agreement on objectives
- Determination of the nature and scope of the participation of various groups, organisations and institutions
- Development of project activities, inputs and outputs
- Setting of clear indicators for monitoring the implementation process

2.1.1 Gender-Specific Analysis of Problems

Project interventions must be based on an understanding of the origins of the problems under consideration. Various tools for problem analysis have been developed over the years.

These tools can also be used to bring to light gender-based differences in roles and responsabilities. This gender analysis should clarify the problem from the perspective of both the men and the women of the target population. Annex I provides information on gender analysis of socio-economic and technical feasibility of projects.

2.1.2 Agreement on Objectives

A gender analysis will help to define more clearly who must be targeted for project assistance in order to resolve the present problems. To ensure smooth project implementation, objectives need to be determined and accepted by the parties involved in the project. At this stage distinguishing between women's practical and strategic needs can help in identifying objectives. It is important to obtain agreement on these objectives in order to ensure the subsequent commitment of all concerned to a gender-sensitive project implementation.

2.1.3 Interest Groups and Institutions

Problems do not exist in isolation, but are intimately linked with people, groups or organisations. Participatory planning and implementation requires knowledge about the interested groups and institutions which will be involved in the project.

Knowledge about interest groups and their structures can be obtained through an organisation analysis. This analysis should focus on barriers to women's membership of organisations, and the nature and quality of women's participation when they are members. This will show more clearly how far these barriers are due to the effectiveness (or ineffectiveness) of the organisations which represent the interests of the women in the implementation of a project.

8 *Evaluating Organisations*

An organisational evaluation is intended to obtain information about interest groups and their organisations. Its key points are:

- preparing an inventory of local political and farmers' organisations, investigating how they are composed and how they function;
- analysing the channels of communication: who knows who, where do they meet, nature of matters discussed, etc.
- analysing who makes decisions and who actually manages and organises things; an organigramme may reveal decision-making processes and power relations: it is likely that the decision makers are men, while the managers/implementors are women;
- acknowledging that women have a role in the organisation of the community.
- encouraging women to participate in community decisions,to assume functions in line with their actual roles; giving them a chance to develop and formalise their position.

Knowledge about institutions should focus on the following questions:

- Is their package of services (e.g. information and technical assistance, credit, technology) appropriate for women as well as men?
- Can their staff communicate with women as well as men (have they have experience of participatory gender-sensitive methodologies and techniques)?
- Can the organisation reach out to women as well as to men (number and professional level of male and female staff; scope and geographic range of activities; networking and contacts of the organisation, infrastructure and resources)?

The Importance of Involving Local Institutions and Organisations
Their involvement helps to ensure that the project implementation strategy is culturally and politically appropriate as well as effective and efficient.

This strategy becomes a continuous process to which local organisations will remain committed after termination of European Community inputs. (See also Subsection 3.2.)

2.1.4 Formulation of the project plan
As far as possible, project activities, inputs and outputs should be developed through a participatory consultation process in which the men and women who will actually implement the project are involved. This means that the Community and partner organisations should bring interested parties together. They should include decision makers as well as the members of the intended beneficiary group and/or appropriate representatives of such groups.

2.1.5 Indicators for Monitoring and Implementation
The interested parties must also reach agreement on the indicators which will be used to monitor their participation in the implementation of the project. Chapter 4 will deal with when and how this should be done.

2.2 Gender/WID in the Various Elements of the Logical Framework

A Gender/WID participatory approach in the Logical Framework has consequences for:
- Project objectives
- Outputs
- Inputs
- Indicators of achievement
- Means of verification
- Assumptions, risks and conditions

2.2.1 Immediate Objectives
In determining the objectives of a project, choices are made in addressing certain problems of the target group. In making these choices, the needs and interests of both men and women need to be considered.

The objectives should specify:
- What needs and interests of men and women are expected to be met;
- What practical and/or strategic needs of women and men are expected to be met;
- Who the intended project assistance is aimed at, and who will benefit. A clear distinction between men's and women's needs for assistance is required;
- The consequences of the improvements and changes, and the benefits expected, for men and women (see also Box 9: Project Objectives).
- Measures expected at institutional and policy level addressing constraints to the effective participation of women and men.

For instance:
Instead of limiting an objective to "increase the productivity of Lake X", the TORS should specify who is involved in the project and who will benefit, e.g. "The project seeks to increase productivity, income and general well-being of the women and men of ... fishing villages around Lake X, by :
- increasing the volume of fish in the lake through environmental protection measures, including...
- improving the fishing techniques of fishermen, and also of interested women
- improving the trading capacity of men and women through the establishment of loans to upgrade the marketing infrastructure and the technical and managerial know-how of men and women, considering the local demand for fish
- improving the fish processing techniques used by women, and also of interested men
- addressing the legal constraints faced by women in obtaining access to loan facilities as well as differences in the level of literacy between men and women of the target group
- improving the outreach and communication capacity of the extension services of the Ministry of Fisheries to include the needs and interests of men as well as women.
- allowing for the barriers experienced by women in relation to access to extension training in new techniques, so that training schedules are compatible with their family responsibilities.

9 *Project Objectives*

The importance of considering project consequences from the Gender/WID perspective is illustrated by the following example.

The Thematic Evaluation mission to the Philippines (1992) noted that the project objectives of improved irrigation systems and improved land-use techniques were being reached. This was leading to enhanced productivity of land resources. However, the gender-specific evaluation revealed that food crop production on the dry lands ("uma") had decreased. This is because the availability of irrigation water made these sites, previously only suitable for food crops, suitable for cash crop production.

The mission also noted that the shift from traditional crops to the cultivation of vegetables, intended for the market, had other unforeseen consequences for women and the family as a whole, e.g. on the availability of food for own consumption and on control over income.

A gender analysis of the existing division of labour and of control over resources could have revealed the women's responsibilities for traditional crops on the "uma" lands as well as their control over these lands. This analysis could then have allowed these responsibilities to be taken into account in project objectives and called for a review of possible effects of the changes for the different members of a family. The objectives could have included compensatory measures to balance a possible negative impact of an expansion in irrigated fields on the "uma" lands. Also special activities could have been foreseen to enhance the commercial skills of women.

2.2.2 Outputs

The project's outputs should be specified separately for women and for men. Furthermore, WHAT has been achieved needs to be specified.

- WHO among men and women has benefited, or suffered, from project interventions, given possible changes in the gender division of labour and responsibilities (e.g. changes in place of work, in remuneration for work, in technology, and in type of work)?
- WHO has obtained access to and control over resources, (e.g. boats, vehicles, land, credit, technology, information) and benefits (e.g. goods, services, income) of the project?

To what extent have practical and/or strategic needs been addressed?

10 *The Need for a Gender Analysis to Determine Who Will Benefit*

The Thematic Evaluation mission to Egypt (1992) noted that mechanisation of farming practices could affect the women's workload. This was the case in a livestock development project in Egypt, where the (male) farmers had the option of transferring resources previously allocated to the support of draught animals (labour, land for feed and fodder crops, investment in animals) to other types of livestock production, particularly milk and dairy production, or to crop production. When men are decision makers, as was the case in this project, and the women take care of the animals, the women's present and future workload may be affected.

In situations like this, gender analysis should have determined what would be the effects of the project intervention for both men and women in the target population.

11 *Differentials in Project Impact*

Wage levels are an area where there can be differences in benefits of projects as between men and women. The Thematic Evaluation mission to Egypt in 1992 noted that female labour hired by the project earned about 60% of the salaries of equivalent male labour. Legally, men and women are equal; however, similar wage discrepancies are commonplace and the labour market is increasingly restrictive for women. Women are seldom aware of their legal rights and do not have the means to secure them.

The constraint of wage discrepancies is not easy to overcome. Projects should begin by paying equal wages to men and women, although other initiatives are also possible. They include:

- *legal rights education for women (see for instance Box 18)*
- *contacts with, and support for, local organisations which deal with women's status and legal issues. This might strengthen existing initiatives and would enable the initiatives envisaged in the context of the project to be culturally acceptable, and therefore more effective in the long run.*

For instance:
The productivity of men and women of communities fishing around Lake will have increased by 19..as a result of:
- an increase of ... tons/year in the volume of fish in the lake
- ...men and women using improved fishing and fish-processing techniques, following training
- the delivery of .. loans, to ... men and .. women, used to upgrade the marketing infrastructure
- the assessment of local demand for fish, and enforcement of trading regulations to protect the local market
- increased effectiveness of technical and managerial training for both men and women.
- the association's attention to the problems experienced by women in obtaining paid employment.

2.2.3 Inputs

The inputs of materials/equipment and services provided by the Community, other donors and recipient countries should include an adequate infrastructure for women's participation. This should include:
- the expertise necessary for a gender-specific participatory approach to project planning, implementation, monitoring and evaluation, including policy and institutional development

12 *Project Means*

Management support is a key element in finding appropriate solutions to overcome obstacles to women's participation in projects.

The various programmes supported by a Rural Integrated Development project in Yemen required separate extension services for farming and livestock in which women are involved, because cultural constraints restrict contact between men and women of the target population. This meant special inputs, such as separate office accommodation and separate training facilities. The female extension staff needed special means of transport, strict rules for working hours and for travel distances.
A gender-specific strategy was developed to reach women farmers and livestock keepers, in view of restricted mobility of women extension staff. The Rural Women's Extension Section successfully initiated the recruitment and training of local women as extension assistants to compensate for the limited number of visits to villages by female extension staff working from headquarters. The section developed specific agricultural, livestock, health education and literacy extension programmes, taking into account the literacy level of the local women.

The Section received strong support from the male Yemeni manager in working out this solution. He defended the innovative role accorded to the female professional staff and to extension assistants within various levels of the project and tackled resistance to females working as professionals and assistants in the project with local authorities and heads of families. He also ensured the necessary funding and inputs.

13 *Ways and Means to Respond to Gender-Specific Needs*

An EC-funded programme to rehabilitate dykes and sluices protecting land against influxes of salt water had to deal with the limited impact of the purely technical interventions of the project. This led to the start of a bilateral action research programme, on a pilot basis, to improve land and water management and to convince farmers of the feasibility of agriculture on these lands. The intention was to raise farmers' interest in maintaining the infrastructure. The area has a high male migration rate and women are taking on a great deal of the responsibility for farming activities.

Because programme support activities were identified through a process of participatory research with women specifically, as well as with the community, women's needs were recognised. Besides focusing on improved farming techniques and water management, the programme also started to assist in other areas of interest to women. Thus, the action research programme focused on women as farmers, as housewives and as community managers. Activities included:

- *legal assistance to informal women's groups so that they can improve their access to credit and services*
- *the strengthening of the capacity of the community to develop health, literacy and child care services*
- *awareness-raising among women and men on the importance of extension services to both women and men*
- *the training of extension staff in methods for reaching both women and men.*

The integrated approach to development programmes has the advantage that project activities can include special attention for women, so that they can overcome the constraints to their participation and become more productive in their work.

- financial and administrative mechanisms for adjusting project activities to take account of and overcome any barriers faced by women which had not been foreseen.
- project services which are accessible and appropriate to the participation of both men and women in the target group.

14 *Project Delivery Channels*

Experience shows that if a project works with formal organisations of which women are not members, or in which they are under-represented, then women tend to be excluded from the project's activities.

The Thematic Evaluation mission to Egypt (1992) noted that women did not participate in the animal health cooperatives, nor in the cooperatives for milk processing and marketing. The conditions for membership in these organisations did not exclude women members, but cultural constraints prevented them from participating.

In such a case women are likely not to benefit from project interventions, unless their participation in organisations is analysed and information becomes available on the function and capacity of women's groups.This information should be used in determining the channels for the delivery of services to women.

The Thematic Evaluation mission to Costa Rica (1992) also noted that the organisations established by the project for the delivery of agricultural services did not have female members, nor was any women's group involved in the organisation. This also meant that other ways had to be found to assist women in their agricultural activities.

2.2.4 Indicators of Achievement

These must lead to a qualitative as well as quantitative assessment of:

- the achievement of objectives and outputs for men and for women
- the way in which social groups as well as men and women are benefiting from the project
- the way in which benefits are measured (i.e. access to and control over benefits).

2.2.5 Means of Verification

These include progress, mid-term and final reports, as well as internal evaluation workshops and monitoring field visits. They should contain evidence to verify the level of achievements by gender, and should be based on quantitative as well as qualitative participatory evaluations.

2.2.6 Assumptions, Risks and Conditions

These are key factors which are beyond the project team's control, but which can affect project implementation. These factors can include policy, institutional and socio-cultural constraints, as well as risks, and assumptions on counterparts' inputs.

They should not include those constraints faced by women which can be tackled by the project through, for instance, the provision of specific inputs, the use of gender-sensitive personnel and gender-specific needs assessments, and the definition of strategies for project implementation.

3 GENDER IN THE PROJECT CYCLE

3.1 Overall Policy Framework

3.2 Project Preparation

3.2.1 Terms of Reference
3.2.2 Selection of Consultants
3.2.3 Missions for project preparation

3.3 Project Appraisal

3.4 The Financing Proposal

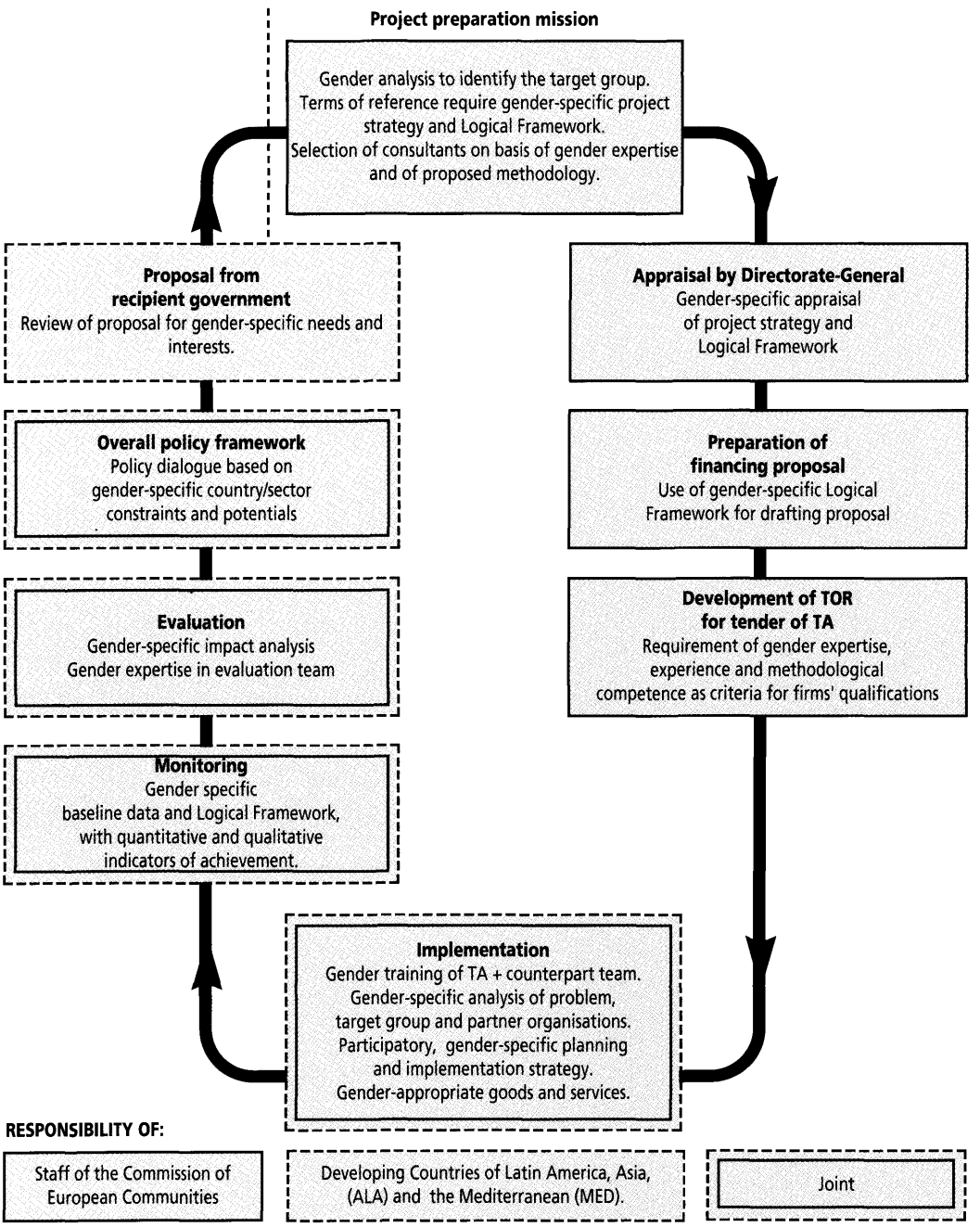
3.5 International Tender and Contract Procedures

3.5.1 Terms of Reference
3.5.2 Proposal Evaluation

3.6 Project Implementation

3.6.1 Inception Phase
3.6.2 Project Implementation Strategy

Actions for Integrating Gender into Key Steps of the ALA/MED Project Cycle



Improved management of the project cycle to achieve one of the European Community's major objectives, viz. that women be systematically consulted and take part in all development projects financed by the Community. What is expected from various parties involved in the stages of the project cycle, taking into account the division of responsibilities as described in the ALA/MED Management Guide, Section 7? The importance of gender analysis. The need for consensus on gender-sensitive strategy.

The Gender/WID sensitive project design is based on an understanding of the problem and possible solutions from the women's and men's point of view. The level of understanding will vary with the different stages, and will depend on the investment which project management are willing to make in data collection and analysis. Annex II outlines traditional research methods as well as effective rapid appraisal tools.

This chapter should be read with the contents of Chapter 2 in mind (how to adapt the Logical Framework to take into account the gender roles and needs of men and women). This information is relevant for all stages of the project cycle, viz.:

3.1 Overall Policy Framework
3.2 Project Identification and Preparation
3.3 Project Appraisal
3.4 The Financing Proposal/Approval
3.5 Tender Procedures
3.6 Project Implementation
4.0 Project Monitoring and Evaluation

3.1 Developing the Policies

The Commission headquarters usually sets out its approach to development aid and economic cooperation in a specific country, in a strategy and policy paper. This document forms the basis for policy dialogue with Member States and recipient governments, and should contain information on differentials in the impact of development aid on men and women stemming from their socio-economic position.

In discussions with recipient countries the Community negotiators have an opportunity to pay attention to gender obstacles experienced by women and men in country/sector development, and to define (through the policy or the project) action which is acceptable to both the Community and the recipient country.

Gender-Specific Policy Questions

• What is the nation's position on Gender and WID? Is this position expressed in any Gender/WID policies at the national level or in specific sectors of development cooperation?

• To what extent do women play an active part in the sectors involved in development cooperation?

This will depend on factors such as:

- legal, political, social or cultural advantages or constraints particular to the country or sector, which facilitate or impede women's ability to fully participate in, and benefit from, Community-financed initiatives.
- the existence of key institutions and organisations, both government and non-government, and their capacity for working with women and men on (joint) problems
- the percentage of women enrolled in post-secondary education or in training programmes which are important for this sector.

Common gender constraints encountered in development conditions are listed below.

15 *Common Gender Issues in Development Conditions*

Obstacles to women's participation
For example, basic practical constraints facing rural women of the Nile Delta in Egypt include:
- *poverty*
- *restricted mobility*
- *lack of clean water*
- *distance from health services*
- *low level of education*
- *poor housing conditions*
- *often long distances to the fields with little access to transport facilities.*

Basic household activities are time-consuming and leave little time for new activities to be started up, or for women's groups to be organised.

Improving women's participation
Stress the need for an integrated approach to development fitting in with the activity profile of women.

Develop at project level methods of transporting water, fuel and food. Improve techniques of food processing, food preparation, food conservation, etc. Decentralise services and train community organisations for action in:
- *literacy*
- *housing*
- *basic health.*

These actions will include men and women.

Compile a calender of annual activity, including notes of where people work and what they do. Analyse how women allocate their time, identify potential for appropriate labour-saving technology.

Cooperate with multilateral and bilateral agencies and, above all, with NGOs, to increase availability of technical assistance to women in areas which the project itself cannot address.

3.2 Project Preparation

Project proposals are presented by the beneficiary government to the Commission of the European Community. Project ideas may come from a variety of sources, with varying amounts of detail and justification. Ideas should be screened for Gender/WID sensitivity in the field (if possible and appropriate) as well as at Commission headquarters.

Collecting gender-specific data

This can best be done on the basis of gender-specific information on the recipient country which is available at the Delegation or from other sources, for example, country profiles and sectoral papers prepared by Member States, by other donor countries or by other organisations. An ideal basic reference point is the Gender/WID position stated in the country policy paper. Very often information exists, but is difficult to locate.

Sources and Organisations

Sources and organisations to contact for information on gender issues include government and non-government organisations, other donors, national machinery, United Nations Development Fund for Women (UNIFEM), UNDP, World Bank, EC Member States' embassies; bilateral development agencies such as CIDA, USAID, ODA, DGIS, DANIDA, NORAD; the Joint Government Donor Coordination Committee and/or a WID donor coordination committee could also be useful (they can be traced through UNDP/UNIFEM).

This section draws attention to the salient issues which should be taken into account at three important steps in the process of preparing a project proposal for financing, i.e.:

- drafting the terms of reference for consultants responsible for proposal preparation (Subsection 3.2.1)
- the selection of consultants (Subsection 3.2.2)
- the preparation of a project (Subsection 3.2.3).

3.2.1 Terms of Reference

The Terms of Reference should be such that the team produces a technical and socio-economic appraisal based on gender analysis at sectoral level, as well as a gender analysis of the project area population (Annex I). They should carry out a review of the institutional/ organisational context, regarding the capacity of local staff or institutions to deliver services to women as well as men, and prepare an inventory of organisations active in the proposed project area, in order to evaluate whether and how these organisations could collaborate in the project.

The Terms of Reference will also require the team to indicate areas where data are not yet available, but are required.

Collection of additional data is necessary for a better implementation method. If the lack of data is significant enough to endanger the project's viability, it should be not presented to the PV/ALA/MED Committee for approval until the deficiency has been corrected and the draft proposal has been updated with the correct figures.

16 *Identification of Local Organisations*

A majority of consultants have expertise in particular technical fields. Accordingly, they may lack the contacts necessary for obtaining information on gender expertise. In addition, assessing the level of expertise of local organisations and of local experts is not always easy.

One solution can be collaboration with national machineries designated by governments for the advancement of women, or with focal points in sectoral ministries. There is frequently a government women's bureau or a large national women's non-governmental organisation. These umbrella organisations can provide assistance at the strategic level and help in identifying and assessing which local organisations or experts may be useful for preparation missions and for project implementation.

The importance of these umbrella organisations is chiefly at the strategic level. Neither their mandate nor their staffing capacity allow for involvement at the project implementation level. The WID national machinery and focal point in the sectoral ministries are the appropriate bodies with which to develop a Gender/WID strategy, through involvement both in the gender-specific sector analysis and the social/gender analysis at project level. They can assist in monitoring progress, as well as ensuring feedback of experiences from a gender perspective into national, regional and sectoral policy and planning.

Another solution could be to applying simple tools for institutional analysis.

Tools such as the "Participation/Activity Matrix" are particularly useful for analysing NGOs' mandates. The matrix defines a project's activities and relates them to roles performed by participant organisations. The analysis reveals to what extent project support activities can be rooted in local organisations, and what kind of support would be required from the project.

Organisations' capacity can be analysed using a simplified version of the World Bank "Institutional Capacity Assessment System" (ICAS). Further details are provided in Annex II, Research Tools in Participatory Project Cycle Management.

With the participation of decision makers and intended target group representatives, the mission should:
- Analyse the problem on the basis of a gender analysis.
- Develop a logical framework, including qualitative and quantitative indicators for evaluating project achievements, and assembling those elements which are important to women.
- Design an implementation strategy for the project which aims to overcome the barriers to women's participation.

These baseline data are usually collected with a view to defining the problem more clearly, identifying the types of interventions which may have a negative impact on men and women, and analysing the social viability of a project. They can be obtained for a reasonable price, and using rapid diagnostic techniques.

Cost should not be an obstacle, because findings show that resources spent on understanding a baseline situation have direct pay-off in project efficiency. (Eastern and Southern African Management Institute, ESAMI, 1990) Annex II provides details on rapid diagnostic techniques.

The terms of reference should recognise and accept the additional tasks, and therefore additional time, required for acquiring an initial understanding of different roles and responsibilities ascribed to men and women in the project area, and their corresponding needs and interests. These tasks include: additional data gathering; fostering an awareness of the importance of gender issues among all concerned; and formulating recommendations which are so specific that they can be understood and implemented even by people who are not familiar with gender issues.

3.2.2 Selection of Consultants

The invitation to tender should require information to be included in the proposal on:
- how gender issues will be handled
- the firm's gender expertise and the role of gender experts in the mission
- the firm's track record in delivering gender expertise in the relevant sector.

For all large projects, especially for those where gender issues are significant, the team must include one gender specialist who is experienced in collecting gender-specific data (using participative methods). This person must also be experienced in problem analysis techniques and in the development of implementation strategies which integrate gender issues.

17 *Gender Specialists*

Gender specialists are professionals with experience in methodologies and techniques for social, economic and political analysis of gender roles and responsibilities, their potential and constraints. They are capable of building strategic action into the project cycle.
He/she may be:
- *a sociologist or anthropologist, trained in gender-analysis techniques, who is responsible for socio-economic analysis of identified target groups within the project or sector*
- *a human resource development (HRD) specialist or an institutional development specialist, with Gender/WID skills/experience, mandated to focus on HRD issues or institutional development issues on a gender-disaggregated basis*
- *a specialist in the sector (e.g. forester, agronomist, etc.) with Gender/WID skills/experience, mandated solely to explore gender issues.*

In all cases, the gender specialist should have an academic background and experience similar to other team members, and be well informed of the cultural and socio-political reality of women in the country concerned.

The gender specialist may still experience difficulty in being accepted as an equal on the mission team, and in negotiating/discussing gender issues with counterparts in the partner country. Thus, the gender specialist would need personal skills such as:

- *good communication skills*
- *ability to cope with high-stress situations*
- *well-developed cultural sensitivity*
- *strong orientation to team work.*

3.2.3 The Project Preparation Mission

The ALA/MED Management Guide provides relevant details on the purpose and content of the mission.

Project Preparation Mission Team Members:

The terms of reference relating to members of the preparation mission should specify that these experts undertake an analysis of the sector according to gender, focusing on the potential of women and the barriers facing women.

The team members must agree on an approach which integrates the gender question, for field work and reporting, as well as for project implementation strategy.

The gender specialists and/or team members responsible for incorporating gender-specific needs and interests in the proposal, should organise and implement a gender analysis to identify relevant gender-specific constraints and potentials. All team members should use this information, which should be fed into the various elements of the Logical Framework. A gender-specific strategy should be developed in coordination with counterparts and the mission team, and become part and parcel of the project proposal.

The gender specialist should prepare his/her mission by reviewing as much written information as possible on the situation of women. Together with Headquarters, he/she will determine whether a local counterpart can and should be hired to collect information in advance, act as an interpreter during interviews with women, and/or provide inputs for reviewing the mission team's findings from the point of view of a local woman.

If information on women in the relevant sector is unreliable, the gender specialist will not be able both to gather and analyse data, and at the same time to contribute fully and usefully to the project design. If, in a large project, it seems that gender issues could be significant, Headquarters and the Delegation could decide to send a separate WID data-gathering mission ahead of the preparation team, to hire a local WID specialist to collect the required data before the team arrive, or to field the gender specialist before the rest of the team.

3.3 Project Appraisal

The Gender/WID Impact Assessment Form completed by the team of consultants allows the proposal to be assessed, not only on the integration of gender-specific interests into the project framework, but also on the nature and quality of plans to enhance women's participation. The Form is given in Annex V.

During the debriefing of experts on the field mission by the Commission, discussion could centre on:

- the barriers identified to women's participation, and strategies to overcome them
- the planning and budgetary implications of the mission's recommendations for collection of gender-specific data needed to refine all elements contained in the Logical Framework
- the results of consultations with national professionals who are experienced in gender issues relevant to the proposed project, with institutions which can collaborate in the project, and with the women and men of the target group and/or their representatives.

The Delegation should also obtain comments and suggestions from local authorities before the consultants finalise their report, and ensure national support for the gender approach elaborated in the mission report, on the basis of which the financing proposal will be drafted.

The Delegation should report its findings, and make recommendations on what may still be needed from a gender perspective for drafting the financing proposal and for project implementation. This information can be useful when Headquarters debriefs consultants on the basis of their draft report.

3.4 The Financing Proposal

Approval of a financing proposal is a crucial stage for checking the gender sensitivity of the project design.

Annex III presents the gender/WID issues which need to be considered in relation to the Guidelines for the Preparation of Project Proposals for EC Financing (Section 4 of the ALA/MED Management Guide).

3.5 International Tender and Contract Procedures

3.5.1 Terms of Reference

The importance given to gender, particularly to women, in project implementation should be highlighted in the Terms of Reference for international tender of consultancy services. The information requested should detail the experience of the firm itself, and of its proposed personnel, in gender issues, and its proposed methodology for ensuring a gender-sensitive approach.

3.5.2 Proposal Evaluation

To make the evaluation more effective, qualification points could be awarded for the following:

- the presence of relevant WID expertise within the firm;
- the firm's capacity to recruit WID expertise;
- evidence of a clear understanding of the gender/WID issues which play a critical role in the project;
- presentation on how objectives will be achieved in the strategy for dealing with gender-specific potentials and constraints, and in the work plan, inputs, monitoring and evaluation;
- provisions in the job descriptions and prescribed qualifications which ensure that the technical assistance team is ready and willing to target its project assistance in a manner which takes account of gender issues.

3.6 Project Implementation

Since day-to-day management is the responsibility of the project director, co-directors of the Project Management Unit appointed by the European Community and the recipient country, they are also responsible for putting a gender-specific project implementation strategy into practice. This principle must be clearly established in each yearly work report which must follow Commission Headquarters' procedures.

3.6.1 Project Execution

A project usually starts with an inception phase, where the context and nature of problems to be resolved are considered, and project activities are planned across the time available. In this phase the consultant who has been awarded the contract will review the project's technical, socio-economic and institutional feasibility (Annex I). Gender analysis should be part and parcel of the feasibility analysis.

Smooth project implementation depends largely on consensus being reached by the parties concerned on the project objectives and implementation strategy.

Participatory project planning is dealt with in a gender-specific way in Chapter 2 and is a useful tool in the inception phase. It includes problem analysis, agreement on project objectives, weighing of alternative implementation strategies, target group definition and development of a Logical Framework.

Action workshops can be used to reach agreement on the principles of a workplan. The agenda of an action workshop could cover the basic elements of a project plan. Project planning workshops and action workshops are crucial instruments for analysing in a gender-specific way whom the project will target and who will benefit, and for raising awareness.

3.6.2 Project Implementation Strategy

The Participatory Approach is widely acclaimed as a gender-sensitive project implementation strategy.
In practice three levels of intensity in participation can be identified:

- Level 1: Interaction in the form of information exchange and consultations
- Level 2: Joint contributions of labour and finance towards implementation.
- Level 3: Technical assistance to enable people to plan, implement and evaluate solutions to problems, and also to decide on and control development activities themselves.

Many development aid projects, including Community-financed projects, show participation at the first two levels. The third level is less frequently seen. Of the nine thematic evaluations carried out in ALA/MED countries in 1992, only three projects applied participatory principles at the third level of intensity.

A gender-sensitive strategy for project implementation will apply a participatory approach and will pay specific attention to certain features which commonly present particular obstacles to women's participation in :

- basic education (Box 18)
- membership of organisations (Box 19)
- communication (Box 20)
- institutional support (Box 21).

Involvement of Local Expertise

Local gender training expertise and facilities can be mobilised to take part in the project implementation strategy.

Tasks which are appropriate to national-level professionals include:

18 ***Gender Issues in Basic Education***

Gender constraints in basic education

Data from the 1986 census in Egypt indicate that almost all boys in the rural areas (96%) enrol in first grade, but that three out of every ten girls never even enter school.

Important influencing factors are cost, crowding, distance and lack of regular transportation, but also the perceived irrelevance of education for women.

While this situation remains, women farmers' high illiteracy rate will remain one of the major obstacles to their participation in extension training.

Possible improvements in basic education

Consider the need for separate data on men and women's educational characteristics.

Make the identification of obstacles to women's education part of project planning. Prioritise activities to raise awareness at policy level, if project-specific action is not possible.

Project action could be based on a two-tier strategy:

- *diversifying the subject matter of existing literacy classes to ensure relevance to women's specific interests.*
- *incorporating participatory methodologies in extension packages geared towards illiterates.*

Link up with local organisations on women's education campaigns to encourage parents to send their daughters to school, and keep them in education.

Encourage coordination between the Ministries of Agriculture and Education in diversifying vocational and literacy training for women to include more marketable skills.

19 Gender Issues in Membership of Organisations

Obstacles to women's participation

In many developing countries women do not participate in the organisation of communal affairs or in economic and social organisations run by men. They seldom have full membership or voting rights. Women's potential for leadership and mutual support therefore tends to remain invisible and untapped. In fact female leaders could greatly facilitate communication, organisation and, ultimately, equal participation for men and women in development.

Ways to improve women's participation

Identify obstacles to women's participation and women's collective action. Assess ways and means to link up with women's informal associations.

Encourage activities that facilitate household and farm work (time-saving technologies, day care centres, etc.) so as to permit women to participate more in economic, social, educational and political activities.

Include activities and incentives aimed at establishing women's and mixed-gender local organisations such as cooperatives, farmers' self-help associations, credit and saving unions, consumer associations and labour unions, and at furthering their efficient and transparent management. Assess the possibility of more than one family member belonging to the farm organisation.

Promote training of organisers within women's associations, especially to strengthen the capacity of women's groups for dialogue and negotiation.

Promote dialogue between rural women's organisations and government institutions.

20 Gender Issues in Communication

Obstacles to communicating with women

There is a lack of communication between women producers and processors, on the one hand, and the public and private research and extension organisations who could assist them, on the other.

Researchers and programme developers fail to consult women and or to consider their needs and views concerning technologies. On-farm activities carried out by women are often overlooked; e.g. seed selection, seed and crop storage, and processing.

Women's participation, either as contract farmers or as employees, is essential in the choice of new technology packages, such as seed production, production of breeding stock, nursery operation, as well as hardware for the production cycle.

Women producers and processors have little direct knowledge of, or means of reaching, available sources of technical expertise.

Ways to improve communication with women.

Support and promote the recruitment and training of more technically qualified female field workers to help women in articulating their needs for assistance, considering their multiple roles and survival strategies (also Box 29: Gender Issues in Agriculture).

Train male extension agents on how to work effectively with women.

To reach women farmers with appropriate messages and technologies, research and extension services must understand:

- *what work men and women do in the sector*
- *who decides what*
- *who has access to and control over resources*
- *what incentives exist for different family members to produce specific outputs.*

This calls for participatory research and extension, which could lead to more attention to subsistence crops tended by female farmers.
The venue and timing of meetings, and the planning and communication techniques used, must be chosen to facilitate women's participation. Specific problems should be addressed: some tribal women speak only their native language, and their lack of command of a lingua franca demands translation facilities or hiring project staff who speak the language.

21 *Gender Issues at the Institutional Level*

Obstacles to women receiving institutional support
Technology, credit, information on increasing access to sources of income, and employment opportunities reach women only to a very limited extent, because:
- *there is little or no awareness of gender constraints*
- *there is no provision for gender sensitisation in sector/specialised institutions*
- *training courses are followed with interest but no assistance is available when what has been learned must be put into practice.*

Ways to improve institutional capacity
Take steps to obtain a clearer picture of gender issues in areas such as land tenure, survival strategies of the landless, migration, access to agricultural credit and inputs, technology, extension services, etc.

Provide time and means for giving gender training to project personnel, as well as to staff of counterpart institutions. Incorporate gender expertise at planning/programming and monitoring level in order to continue the sensitisation process on-the-job.

Ensure feedback into policy guidelines and training materials from extension experiences with women farmers.

- Organisation of gender training, particularly on the role of women in the relevant sector
- Implementation of studies to establish or update baseline information on the position of women in the project area
- Assistance in adapting methods of data collection for monitoring and evaluation to make them more gender-sensitive, and in studying project design in general
- Training in participatory planning (confidence-building, training in skills for meetings)
- Provision of support to staff during project implementation
- Monitoring and evaluation (what it is, how it is used, opportunities for participating in design, execution, and responsibility).

The need for international consultancies can be decided depending on the results of the assessment of national institutions.

Internal Monitoring and Evaluation
Internal monitoring and evaluation systems should be designed and applied in order to ensure that the qualitative and quantitative indicators and objectives set for the project can be measured, followed and evaluated on a gender-specific basis; further details are given in Chapter 4.

Project organisation structure and services

The projects' organisation structure and services can directly influence the quality of women's participation;

- Information on gender differences in the division of labour and in access to, and control of, resources should be available. Staff should be able to take this information into account in working out activities, finance and logistics (22: Danger of leaving gender issues to one staff member).
- Provision should be made for adequate participation and feedback from staff, counterparts and target groups into project management. Measures might be required to train personnel in gender-sensitive and participatory planning, implementation, monitoring and evaluation. (23: The Participatory Definition of Objectives and 24: Gender and Participative Planning.)
- Specific services should be double-checked for gender obstacles (25: Gender and Training; 26: Gender and Credit).

22 *Danger of Leaving Gender Issues to One Staff Member*

Gender/WID should be an integral part of project implementation. If it is treated as a separate item it may well be ignored and isolated from general project support and impact.

The Thematic Evaluation mission in Sri Lanka noted that a local gender specialist had been involved in the identification mission, and that a very limited number of short-term gender consultancies dealt with gender-sensitive project implementation. The mission found that gender issues were mainly left to these specialists, but that they had little influence over the rest of the team, who simply continued their previous approach.

The same result was apparent even in a project where there had been gender-specific action on project implementation.

One way to integrate Gender/WID into project activities is to organise gender training and planning for the entire project team, and preferably also for selected counterpart staff. Another way is to ensure that WID expertise is combined with existing specialised positions in the project. In a project in the Philippines, the thematic evaluation recommended that WID specialisation should be combined with the two positions of: Farmer Organisation and Training Specialist, and Counterpart to the Monitoring and Evaluation Specialist. Management's continuous concern with the integration of Gender/WID in work planning and reporting is found crucial.

The challenge is to find the right approach to gender issues in each of the projects, and to make sure that the daily routine of staff includes working effectively with male and female members of the target group.

23 *The Participatory Definition of Objectives*

Gender analysis and organisation analysis, combined with participatory planning, are tools for defining project objectives. They enable gender-specific knowledge about local circumstances and local organisations to be used in ensuring meaningful participation of both men and women in a project.

The Thematic Evaluation mission to the Philippines (1992) noted that women's participation in the planning and design stages of the project's irrigation component was very limited. Their involvement increased at the construction stage. Women dug and hauled sand and water, while the men cemented; the women also provided food for the labourers.

Women used irrigation infrastructure, as well as the water itself. They helped repair and maintain the canals, dykes and terrace walls. They accounted for 30-45% of members of irrigation associations.

The Thematic Evaluation mission concluded that:
- *women had not been identified as a separate target group with specific needs and interests at the planning and design stages of the project*
- *the staff of the project lacked knowledge on roles and responsibilities of men and women.*

This meant that the project did not address important gender-specific needs of women, such as time- and drudgery-saving technology, day care centres, credit, post-harvest storage and rodent control. Nor was any support planned to women's leadership development within the associations.

24 Gender and Participative Planning

Obstacles to women's participation:
A report on a planning workshop in the Philippines (1992) shows that women participated in planning, but their input remained confined to their traditional caring roles. When participants were asked to divide in three subgroups and work on a map of their environment, the women worked on the social map, men on the resource map and the agricultural trends.

Ways to improve planning activities
A social/gender analysis of who is doing what in a farm household, community or area of project intervention, allows for the formation of subgroups on the basis of actual responsibilities and interests.

Women as well as men must be consulted. Even in the case of "purely" technical design questions, participants - including women - should be consulted on the appropriateness of the design.
Techniques for obtaining the necessary information are explained in Annex II.
They include:
- *Activity Profile*
- *Access and Control Profile*

Participatory planning can take place through community action research and/or through use of the "Goal Oriented Project Planning" method described in Chapter 2.

25 Gender Issues in Training Opportunities

Obstacles to women's participation in training
Differences in education level between men and women are not always identified. Poorly-educated women often do not qualify for formal training because of the methodology followed and the level of the course.

Women are often not identified as target groups for technical training, even if the subject concerns their daily activities. Restrictions on mobility and time constraints make it impossible for them to travel to training sites or to take long absences from home in order to attend courses.

Women often do not hear about training opportunities and extension messages because of their different and/or limited contacts with technicians, extension staff and organisations in general.

Ways to facilitate women's participation in training
- *Offer special training programmes to bring women up to the standards required by the project. Train male extension staff in adult education techniques so that they can work with village women when their very basic qualifications appear to cause problems during formal*

training.
- *Work with government services which are already successful in reaching women; and/or*
- *Train other organisations in how to reach women farmers and traders, providing information on the role of women in the sector and the problems they experience.*
- *Include women in both technical and managerial training as, well as training that aims at leadership for self development.*
- *Train selected women who can then train other women in their village.*
- *Decentralise training, and change the location of project activities and services, or the timing and duration of activities, so as to enable women to take part.*
- *Provide secure sleeping accommodation and child care if women are away from home for a long time.*
- *Use language which can be understood easily by village women, and the communication networks which are most likely to reach them.*

26 *Gender Issues and Credit*

Obstacles to women's access to credit

Credit lines are usually arranged for male- or female-owned micro enterprises, either directly through a development bank, or through the medium of a normal bank which applies formal loan procedures. This discourages female clients, who have:
- *limited access to small working capital loans*
- *limited access to savings institutions*
- *insufficient collateral*
- *no collective interest groups.*

Women are often not members of the cooperatives and other groups that have the legal status to deal with banks.

Parallel credit programmes outside the formal banking system have the problem of moderate coverage, questionable long-term viability, since they do not function entirely as banks and do not have deposits, and a limited capacity to graduate clients into the formal banking sector and to transform their enterprises, (especially women's enterprises, which are the smallest and least productive).

(Subsidised) credit lines *for women only, operated by parallel institutions/projects have proven to have little sustainability because:*
- *the interest rates did not cover the transaction cost*
- *they gave women a false sense of security or dependency, not preparing the borrower for entering the country's formal market system.*

Project designers stressed the social side of the credit experience, ignoring the importance of the economic lessons to be learned from it as well as the economic opportunity cost of women's labour, which is often wasted on unproductive activities.

Education and credit

Women's low levels of education (often semi-literate or illiterate), make them very reluctant to approach an institution for credit or technical assistance, and cause particular difficulty in completing application forms and requirements.

Credit policies

Limited availability of credit for investment in subsectors such as the informal street vendors and traders of the small enterprise sector.

Ways to improve women's access to credit

1. Adjust credit policies and lending criteria *to the kind of activities women operate most in, such as petty trading and other commercial activities, seasonal farming activities where the main need is for working capital rather than fixed capital loans;*
and / or:

- *Assess the potential of parallel programmes outside the formal banking system, which deliver*

minimalist credit and replicate features of informal sector lending, including solidarity groups for male and female micro-entrepreneurs.

- Identify examples of successful solidarity group formation among women for credit delivery purposes, such as Grameen Bank, Bangladesh or ACCION, Latin America. Familiarise (preferably female) leaders and staff with these forms of organisations, either through fellowships or exchange visits.

2. Adjust delivery and recovery procedures: *Decentralise branches or set up a mobile team to reach rural areas and small towns. Adjust business hours to special needs of female and small-scale borrowers.*
Link clients up with assistance to develop and improve business plans and administration.

3. Adjust treatment of arrears and defaults*, e.g. adjusting payments in accordance with borrowers' seasonal cash flow, accepting partial payments.*

4. Education and credit
Agree on linkages with the formal banking system to ensure maximum leverage of the funds through investments and interest accrual.

Support female borrowers with applied research on potential investment opportunities, production training, input procurement training, market support services, business management training, labour-saving alternatives and day care centres.

Establish a guarantee-cum-risk fund which is set up jointly with a lending institution. The fund can be used for a fixed period, after which the institution might be more inclined to offer traditional or mainstream credit arrangements under the non-traditional conditions explored by the fund.

Counterbalance the self-selecting process by relying on simple application forms supplemented by interviews.
Ensure that credit extension services use appropriate outreach channels, such as local post offices, mobile branches, visits to villages, etc.

5. Credit Policies
Lobby for adjustments to credit policies which would target small enterprise sectors with high participation rates of women.

4 MONITORING AND EVALUATION

4.1 Requirements for Gender-Specific Monitoring

4.2 Methods of Verification and Monitoring

4.3 Monitoring Responsibilities

4.4 Key Moments in the Monitoring Process
- 4.4.1 Progress Reports and Technical reports
- 4.4.2 Mid-Term Review
- 4.4.3 Evaluation

4.5 A Key EC Tool for Monitoring: **The Gender/WID Impact Assessment Form**

4.6 What can be done if the Gender/WID objectives are not reached?

The aim of gender-sensitive monitoring. The need for quantitative and qualitative data. The importance of the participatory approach in monitoring and evaluation. Monitoring responsibilities. Key moments in the monitoring process. A key Community tool for monitoring, the Gender Impact Assessment Form. Suggestions for action if it appears that project objectives are not being met.

Commission Delegations and Headquarters should all ensure gender-sensitive project cycle management, and establish adequate gender-specific monitoring and evaluation systems, within their own areas of responsibility and competence.

The purpose of gender-specific monitoring is to bring to light the positive and negative effects of project interventions on both men and women, considering their different roles and responsibilities.

4.1 Requirements for Gender-Specific Monitoring

Such monitoring requires that objectives and outputs are stated in gender-specific terms in the Logical Framework. The indicators of achievement need to give well-defined targets, and to define clearly WHO will participate, as well as what results are expected from their participation. This requires gender-specific baseline data and problem analysis, to identify and set targets for improvement.

Indicators of success should be determined by consensus. They will be defined in terms of participant organisations' understanding of the nature of the problem and of the priorities set by the project objectives; of achievements/outputs to be expected, including the degree of participation and organisation of the target group; and of the inputs expected from each party involved.

Assessment in quantitative terms of the progress of activities, the funds disbursed and the outputs expected will need to be complemented by assessment of qualitative progress, differentiating between gender and social groupings.

27 *Qualitative Indicators of Verification*

The Thematic Evaluation mission in the Philippines found that in the design and implementation of the two projects visited, there was insufficient attention to gender, ethnic and class differences within the target communities. The mission noted that differences in education, language and technical background of the various groups had consequences for their participation in the project. The women of an ethnic minority group spoke only their tribal language, were hardly represented in any community-based organisation, were not used to speaking out in front of their husbands, and in practice did not encounter the technical problems dealt with on the project's training course. Monitoring reports did not take note of these constraints in participation.

The mission related this lack of attention, and the absence of any gender differentiation, to a tendency to rate project performance only on quantitative and physical criteria related to the achievement of targets and disbursement figures, and to overlook the qualitative aspects.

The monitoring system should permit assessment of actual project impact on women as well as men, or any other specific segment of the community. The quality and nature of women's participation can be monitored through qualitative indicators of verification. For instance, as well as asking "How many women participate in training?", one should also ask "Do women contribute to discussions and the exchange of ideas, and do they participate in demonstrations?". As well as asking "How many women are members of a cooperative?", also ask "Do these women have voting rights, and which positions on the management committee are occupied by women?".

4.2 Means of Verification and Monitoring

The Means of Verification should include quantitative as well as qualitative and participatory means of evaluating project activities' gender impact during project execution.

Measures enabling project organisations, partner organisations and target group representatives to identify weaknesses or failures during project implementation should include:
- good communication lines between the target group and field
- staff, project staff and management, project staff and
- counterpart institutions;
- auto-evaluations, which can be conducted at any time during project implementation
- action workshops in which varied interest groups evaluate project strategy and progress.

Participatory monitoring and evaluation implies a collective review and critical assessment of accomplishments (or lack of accomplishments) by the various parties involved, and can as such become an integral part of the project's planning and implementation process.

A very positive feature of European Community development aid is the time-frame within which project conception can be refined, with the help of adequate monitoring tools. A practical and well-defined monitoring system can thus become a tool for self-correction, rather than a control mechanism. This requires that data be collected often enough to enable necessary adjustments to be made during the course of the project.

4.3 Monitoring Responsibilities

The Commission Delegation should ensure that the project Steering Committee, or a similar monitoring body, pays sufficient attention to Gender/WID in the context of project implementation strategy.

The Delegation should support project management in their efforts to enhance the participation of the women from the recipient country at the same level as the men, in the discussions on project implementation.

Headquarters should ensure that project implementation incorporates and enhances the active participation of women as well as men. Progress reports, periodic visits to the projects and evaluation missions can be screened to determine whether significant changes are required in project design or content, or in budgetary provisions, to achieve the integration and participation of both women and men at all stages of project implementation. Such changes may, in particular, be necessitated by policy and institutional barriers to women's participation.

Project management is responsible for providing project personnel and beneficiaries with prompt and comprehensive feedback, which permits project adjustments to be made as required.

4.4 Key Moments in the Monitoring Process

4.4.1 Progress Reports and Technical Reports

The progress reports should specify what has been achieved, and whether this benefits men and/or women. This requires gender-specific data. The gender-related analysis framework presented in Chapter 2 and in Annex IV can be used for this purpose.

What to monitor ?
- Participation and integration of women in the project cycle at the same level as men (see Gender Assessment Form, Annex IV)
- Access to and control over resources (such as land, technology, credit, information, etc.)
- Access to and control over benefits (economic, social, political, juridical, etc.)

What indicators can be used ?

Indicators for participation and integration of gender are found in the Gender Assessment Form. The following indicators are suggested for measuring benefits for women and men:

ACCESS TO, AND CONTROL OVER, PROJECT RESULTS				
A. **Resources** Land Equipment Labour Cash Education/training, etc. Other Access	Access Women	Men	Control Women	Men
B. **Benefits** *Improvements at strategic level:* • Level of knowledge, skills and awareness • Decision making capacity • Organisation • Status *Improvements at practical level:* • Basic needs (food, clothing, shelter) • Employment • Income • Workload • Other				

4.4.2 Mid-Term Review

This in-depth analysis of progress is guided by the format provided in Annex VI of the ALA/MED Management Guide, and should also make use of the Gender Analysis Framework. Specific attention should be paid to policy issues influencing gender development, and to institutional barriers to gender participation, e.g. in counterpart staffing.

4.4.3 Evaluation

The project completion report should cover the results obtained with respect to Gender/WID, as explained in Chapter 2 regarding gender-sensitive use of the Logical Framework. The evaluation mission should complete the Gender/WID Impact Assessment Form (Annex V).

The evaluators must have gender expertise, and experience of participatory monitoring and evaluation systems. They should be given sufficient time to conduct an evaluation on a participatory basis. The Delegation should make efforts to identify local consultants who would be available to act as evaluators.

4.5 A key Community tool for monitoring: the Gender/WID Impact Assessment Form

The Gender/WID impact Assessment Form (Annex V, page 95) has been designed for use by the Commission in monitoring progress on the integration and participation of women in overall project management. It should be used at different stages (project approval, mid-term review and final evaluation) to provide the Commission with cumulative insight into the way in which the project affects men and women of the target group.

It will also provide the Commission with information for reporting to the Council of Ministers of the Community, to the European Parliament and to the OECD/DAC.

4.6 What Can Be Done If The Gender/WID Objectives Are Not Reached?

The following solutions can be considered where gender/WID integration objectives are not achieved:

Add a Women's Component
This solution risks isolating women's activities from overall project goals, and jeopardising women's integration into all project components. Women's household activities tend to be emphasised by this approach, which often understates their economic and social role. A women's component should only be added if this is considered a necessary step for integrating women into the overall project.

Quotas and Targets
These are of little help if the fundamental constraints to women's participation are not identified and overcome. But quotas and targets can serve as a benchmark for progress, once there is agreement on how to overcome the identified constraints. Quotas and targets also help to bring out into the open the issue of participation by female members of the target group, because reasons for success and failure in reaching the targets can be explained, acting as a reference point for further improvements in project methodology.

Replacement of Consultants
Consultants and companies should be recruited in accordance with the guidelines for tender and contractual procedures given in this guide; this should ensure that the project team and management will be motivated to support changes. Commission Delegations and Headquarters should make available the necessary time, facilities and services for work related to integrating gender issues in the project.

Redesign Strategy and Reallocate Resources
Specific suggestions are made below for improving the orientation of the project towards integration and participation of women and men in sectors supported by the European Community. However, if it appears necessary to redesign the strategy and reallocate resources, the revised project design will have to be re-submitted to the ALA/MED Committee, if the content is substantially changed, or if the budget originally approved is increased by more than 20%.
Amendments can be feasible within the existing logical framework. Areas in which gender constraints are most commonly found, such as basic education, communication, membership of organisations and institutional support, were reviewed in Boxes 18 to 21 of Chapter 3. Boxes 28 to 35 provide suggestions for overcoming gender constraints during project design or in implementation, for the sectors most frequently involved in European Community development aid. These boxes follow systematically the basic elements of gender analysis, viz. understanding the activity profile of women and men, access to and control over resources, and the factors which influence constraints.

28 *Gender Issues Related to Energy/Forestry*

Barriers encountered by women

Activity profile
The target for assistance has not been well defined, as little is known about:
- *The roles of different genders (both adults and children) in farming systems, including forest exploitation, "waste land", community pasture and grazing lands.*
- *Field and road boundaries.*

Access to and control of resources
Gender impact remains unclear because little is known about access to or control of resources, such as:
- *ownership (of land, trees, seedlings)*
- *labour taboos in forestry*
- *restrictions on mobility*
- *local systems of management*
- *indigenous knowledge of the value of forest produce.*

Influencing factors
Ecological degradation, and increasing land use for cultivation, influence collection and transport (scarcity and distance).

The time constraints and the delay in return from investment are too much for poor families.

Ways to improve women's participation

Activity profile

Clarify gender roles in the collection and processing of water, fuel, fodder, food, housing/fencing, thatching, utensils, ropes, seasonal by-products, and their implications for project strategy.

Access and control

Analyse access to and control over energy/forestry resources by gender and social groupings; consider project assistance accordingly.

Assess women's decision-making role in natural resource management (women may use wood for firewood, men may use wood for construction, crafts or sale).

Influencing factors

Promote community action on environmental protection and rehabilitation activities. Ensure women's ***and*** *men's involvement.*

Assess and promote fuel- and time-saving technologies with optimal participation of users in identifying the nature of the problem and the appropriateness (technical, social, physical, economic) of the solution.

Assess alternatives for economising on use of natural resources, e.g. organisation of transport for communal collection of firewood, joint cooking facilities.

Avoid launching large-scale tree plantation, watershed protection and environmental conservation programmes in isolation from farming activities: integrate them into existing activities of men and women.

Select appropriate type of forestry (multipurpose agro-forestry).

Provide security of tenure for those with no legal rights, e.g. landless women (community or government task).

Promote efficient group training among women.

29 *Gender Issues in Agriculture*

Obstacles to women's participation

Activity profile

Lack of detailed knowledge on farming system's requirements by gender, in terms of labour, tools and agricultural inputs.

Emphasis on women's productivity and income generation capacity has affected women negatively by failing to take into account constraints (such as time available, care of family and children, health and nutrition), which affected their ability to work. Changes in women's workload can affect child care, childrens' school attendance, and family nutrition.

Access and control

Underestimation of women's economic role in agriculture meant that policy -and decision-makers paid little or no attention to improving women's productivity.

The economic and political preference for devoting research, extension, technology development and credit to cash crops at the expense of food crops, limits attention for activities managed and controlled by women farmers.

Influencing factors

Changes in women's ability to earn an independent income affect household cash flow.

Lack of female agriculture and livestock extension agents makes communication with and delivery of services to women more difficult, and in some cultures impossible.

Food availability is influenced by women's access, or lack of access, to control over land and productive resources (Boxes 28 and 33 on credit and land).

Ways to encourage women's participation

Activity profile

Consider the division of labour in deciding which household member should participate in project activities such as soil conservation, water users' groups, training and extension in livestock.

Design and implement project activities as an integrated part of the farming system which includes productive and reproductive responsibilities of household members. Compensate added workload with labour-saving devices, child care, flexible hours, transport facilities. Pay labourers by task, piece or kilo so women can work part time.

Access and control

Promote collection and presentation of statistical data and case studies on women's roles in agriculture and livestock.

Analyse the appropriateness of proposed technologies for low-resource farmers and livestock keepers, such as women.

Improve access of women who raise cattle to credit, veterinary services, and relevant information.

Include women farmers/livestock-keepers in surveys and other preliminary activities when defining research and extension agendas.

Include women in on-farm trials. Conduct research on traditional food crops, storage and processing, traditional livestock varieties, and other agricultural activities managed by women as well as men.

Track women's participation in training to identify problems in reaching women at an early stage.

Conduct separate field days for women, with local translation if necessary, or incorporate specific efforts to ensure their participation in general field days.

Ways to mitigate influencing factors

Review the household cash flow situation with women and men, using participatory tools for project impact evaluation, and solicit action.

Adopt a recruitment strategy aimed specifically at women and use both informal and formal channels to reach possible candidates. Provide incentives to overcome gender constraints:

- *promote image of women working in technical fields*
- *overcome logistical problems*
- *deal with cultural proscriptions (by working in pairs instead of alone, define working area in culturally permissible terms).*

Train women specialists as livestock extensionists, para-veterinarians and livestock volunteers.

Assess the particular roles and needs of women in livestock production. Provide extension services and training directly to women, with training modules aimed at personnel with less formal preparation; train male agents for outreach to women.

If there is a lack of women in positions of responsibility, expand training eligibility for female personnel in mid-level positions from which future managers will be drawn.

Develop procedures for actively identifying candidates on merit, rather than relying solely on traditional channels for nomination, which may not view women as potential managers.

Obstacles to women's participation

Activity profile

Water allocation often does not take into account domestic water use such as washing, food preparation, cleaning, watering animals.

Access and control

Women are losing access to and control over land for food crops, due to the increase in irrigated land for cash crops.

With the introduction of irrigated cultivation, women are exchanging their position as farmers on their own plots for that of agricultural labourers (for their own family or on a contract basis). This change leads to a fall in income and working conditions.

Women mostly leave the exploitation and management of irrigation to men. In the absence of men, women do assume water and canal management responsibilities.

Membership of water users' associations often requires title to land and/or cash contributions, which has the effect of excluding women.

Water boards usually limit their services to technical aspects, which deprives farmers in general of organisational and management support.

Governmental privatisation policies do not consider gender-specific constraints and opportunities in the area of small-scale pump irrigation and its management.

Women usually own small plots that do not justify economic investment in irrigation investment.

Possible ways to encourage women's participation

Activity profile

Consider household water use carefully in designing water system changes

Access and control

Analyse effects of the changeover to irrigated cash crops on household food availability, as part of the feasibility study. Monitor this process and provide support to ensure women's control over cash and/or the family food security.

Analyse the potential effects of irrigation system changes on women's workload, income, production, and household activities. Create possibilities for improving working conditions and alleviating domestic duties.

Actively recruit women for water management and maintenance positions, and promote their eligibility. Provide management and technical training, as well as leadership training to give women farmers a voice in allocation of irrigated land and irrigation water.

Replace cash contributions with contributions in kind for water users' associations. Negotiate joint land titles or waivers of land title requirements. Address time constraints for males and females in taking part in water users' groups.

Help Water Boards to introduce socio-economic aspects when preparing feasibility studies. Train engineers in handling socio-economic feasibility data and their implications for project implementation. Mobilise political support for effective political coordination with Ministries and organizations responsible for rural development.

In Bangladesh, evidence since the eighties shows that landless women and men, (if supported by adequate credit facilities and training), can operate mechanised irrigation equipment and can control its benefits within the new socio-economic structures. Build on these and other experiences to design and carry out gender-specific rapid appraisals of privatisation's effects on various male and female groups. Acquire insight into the problems and opportunities of both landless men and women in terms of labour patterns, mobility, skills, income opportunities and objectives, in order to involve them in irrigation enterprise.

Create special training and credit opportunities for groups of landless women to enter or formalise businesses in collective water selling. Provide support with registration problems.

Lobby for adequate access to credit and management training for landless women.

Explore possibilities of women grouping neighbouring pieces of land and investing in joint irrigation.

31 Gender Issues Related to Land Holding

Gender related constraints

Women's traditional rights over common land are often undermined by land reform which stresses private ownership. Women's constraints in access to land range from legal to procedural aspects.

Land and credit

The evaluation mission noted that the Credit Programme in Costa Rica is accessible to all participants. However, only women with a title to land and with "sufficient guarantees" (labour, quantity of land and soil quality) are eligible for credit. Female ownership of land titles varied between 1 and 2%.

The Law of Equity of 8 March 1990 in Costa Rica stipulates the right to register ownership of housing and land in the name of both husband and wife, and always in the name of the woman if she is living in partnership or is head of the household. However, so far the Institute for Agricultural Development (IDA) has taken the view that the man is normally the head of the household. It has only allowed a woman to benefit if she is acting as head of household and her family represents an adequate workforce.

Ways to improve agricultural land reform and women's access to land ownership

Undertake analysis of traditional land tenure and land access systems before proposing changes. Review how the traditional and current system will interact after reform.

Monitor impact of land and tenure reform on women's access to land by ensuring reliable baseline data. Take class and ethnic differences into account.

Provide titles to both men and women, not just heads of households.

Eliminate minimum acreage restriction on access to formal title.

Reduce fees and simplify procedures for obtaining formal title.

Land and credit

Look for an appropriate instance of women's exclusion from legal rights in order to take a test case. Sensitise the government and financial institutions to open up adequate credit sources to women. Use institutional policy dialogue and/or gender training, in coordination with other donors.

Develop viable credit schemes in favour of women farmers, such as group guarantee schemes or intermediary lending schemes (Box 23 on credit delivery mechanisms). Promote a savings mobilisation component in the project.

Stimulate national counterparts and women to approach the national machinery and Ministry of Agriculture focal point at high level to discuss this issue with IDA.

Raise this issue during the mid-term review and evaluations when high-level policy makers are present.

32 Gender Issues in Small-Scale Enterprise

Gender related constraints

Women-owned enterprises tend to be among the smallest, requiring small but frequent loans (revolving capital).

Women entrepreneurs often lack the time, mobility and means to contact a project headquarters for services.

Project staff are not prepared to make the effort to try and reach women or to identify channels accessible to them.

Women are disadvantaged by gender differentials in earnings and access to formal credit, technology and other productive assets.

Institutions working with women often concentrate on "traditional" subsectors which offer low returns and low market potential, and have little or no capacity in moving women into high return/high potential subsectors.

There is a lack of information on potential and constraints in non-farm enterprises (Box 34 on Employment).

Staff has insufficient planning and management skills to deal with projects promoting women's income-generating activities.

Strategic Solutions

Avoid high transaction costs for small loans by quick and simple loan procedures that require less staff time and increase overall loan volume.

Use branch offices to provide project services at the local/village level, to minimise women's travel time and costs.

Improve interaction between staff and women by locating the staff in the field. Use female and local staff to promote the project.

Stimulate contacts between appropriate SSE agencies, advisors and trainers, and women's organisations. Develop and distribute information material through channels commonly used by women.

Carry out a socio-economic study of marketing practices by women and men in given economic systems. Include marketing channels, exchange of skills concerning food marketing, rural-urban linkages in networks and transportation.

Promote marketing organisations where women can participate equally; promote more adequate facilities for marketing by women (e.g. infrastructure, child care centres, storage facilities).

Include funds and personnel (perhaps Master's or Ph.D. researcher) to study the structure and composition of labour markets and the rural enterprise sector (including part-time and seasonal enterprises) related to the project area.

Promote financial facilities for marketing and other micro-enterprises by women; access to credit, revolving funds, vehicles, etc.

Strengthen the capacity of national agencies for conducting basic training in improved marketing practices, with a focus on gender issues.

33 Gender Issues in Marketing

Gender related constraints

Women farmers and traders are hindered by formal systems which do not take account of:

the impact of operating costs for women
the inability of women working part-time to meet fixed costs
women's inability to complete written formalities because of low literacy.

As informal members of the market, women are very difficult to reach because they are not members of traders associations.

Large-scale commercialisation has a negative impact on women's traditional commercialisation patterns.

Approaches to improve women's participation

Carry out a full analysis of private trading, including activity by women traders and informal marketing by women farmers, at the start of project activities.

Analyse the impact of formal marketing systems on traditional systems used by women traders and farmers.

Broaden the content of market information programmes and other assistance. Increase the chances that they will reach women by using a wider and more appropriate range of communication channels.

Promote traders' credit programmes with low minimum loan size and limited collateral. Decentralise delivery to encourage women to participate.

Monitor impact of large-scale commercialisation programmes on women livestock keepers, farmers and traders. Determine what the programmes mean for:

- *local food provision*
- *changes in division of labour*
- *changes in access to and control over raw or processed materials and income*
- *changes in decision-making patterns within the family.*

34 Gender Issues in Employment

Gender related constraints

Women's workforce participation and their working conditions (particularly in the commercial culture) are rarely analysed during the preparation of the project, and rarely monitored during its implementation. This means that the project does not target specific assistance to women's social or economic constraints and is developed without knowledge of their legal rights.

In many cities women are replacing men in food processing and vending. Women use household infrastructure and/or increase their temporary participation in rural labour markets in order to get extra income.

- *Women are often forced to accept lower wages than men.*
- *Women are ideologically undervalued as wage workers, because:*
  - *emphasis is put on their reproductive and household management roles*
  - *trade unions, dominated by male workers, press for exclusionary action against women' employment in traditionally male areas*
  - *government actions, through fiscal and social security measures, discourage women's entry into paid work.*
- *Occupational and task segregation in the labour market lead to enclaves of female-only employment.*
- *The skills women are credited with, like greater patience in performing complex but highly routine jobs (such as electronic assembly), tend to be undervalued in wage rates.Women have less access than men to formal training.*

The promotion of export-oriented industrial growth, by export processing zones or by incentives to domestic and multinational export firms, has led to an increase in subcontracting. The informal sector often produces for the formal sector through forward selling and backward links. Job opportunities expand in the informal sector but they are characterised by low wages, no benefits, and seasonal or intermittent demand for work. They attract more women than men.

Agribusiness firms, unaware of women's productive activities in the sector, made contracts with male farmers, individually or through farmers' associations. This has adversely affected women. The farmers turn to their wives and daughters as labourers, increasing women's unpaid workload. Women have to give up their own income-generating activities and/or subsistence

agriculture, with negative implications for women's enterprises and local food production.

Approaches to Improvements

• Analyse rural labour market trends and their impact on women's employment, as well as women's participation in informal sectors (rural-rural and rural-urban migration). Provide assistance to women's organizations in the informal sector.

• Promote employment-creating policies, adequate income for wage-earners and more equal wage conditions for men and women

• Assist studies of the impact of migration, seasonal labour market fluctuations, wage trends, etc., on women and households and in the design of adequate policy response.

• Support women and women's organisations working in the informal sector, through credit and business training for income-generating activities. Help them to link up with specialized NGOs and government agencies.

The policy framework could promote dialogue on indirect policies, such as:

• revising regulations and legal conditions, with special emphasis on removing the constraints which female micro-entrepreneurs face in setting up businesses and gaining access to productive resources

• devising agricultural sector policies which favour the development of small-scale rural industries

• investing in female education and technical training or apprenticeship programmes for women

• investing in mobilisation and recruitment of women into trade unions

• gender-sensitising decision makers regarding fiscal and social security measures affecting women's entry into paid work

• mobilising women for vocational training in non-traditional areas

• supporting women in obtaining improved labour conditions (see below for examples from subcontracting businesses).

Intermediary non-profit organizations could bridge the gap between export firms and low-income women producers:

• assisting in negotiating contracting arrangements with large firms.

• giving women access to credit, technical assistance and organizational skills to operate efficiently.

• helping individual women to upgrade their skills so that they have better employment possibilities.

An example in Ecuador shows the need for, as well as the success of, an intermediary organisation which motivated and trained women in technical and managerial skills. They were involved as low paid family members in peeling cassava for the agribusiness of the male farmers' association. Viable starch production businesses were set up, enlarging the volume and quality of women's traditional starch production and using low cost, appropriate technologies. Credit facilities were negotiated for the women associates by the umbrella organisation once they were convinced of the project's economic potential. A growing number of women-only associations, as well as some mixed associations, have started producing various starch qualities for different use.

35 Gender Issues in Population

Gender related Constraints

Population factors such as family size and composition or family decision-making processes, interact with rural/agricultural development. For example, the adoption of new production techniques can directly or indirectly affect women's productive potential, their role as family food producers, their social position and the family's food security, income and standard of living.

The lack of data on and of awareness of, the interrelationship between demographic factors, women's role/status and rural or agricultural development among policy makers and development planners hampers the design of development projects.

Approaches to Improvements

Use an action-research based approach to integrate population concerns and factors systematically into agricultural and rural development projects. Actions could:

Improve the access of women and children to health services as an integral part of project activities.

Create employment opportunities for women as providers of mother and child care, health or family planning services.

Support girls and women in gaining full access to education and training opportunities.

Assess health education and training, including managerial and supervisory training of girls and women.

Promote education for girls and women in functional literacy and population education, and equal opportunities for them in education generally.

Promote educational and vocational training required for women to move out of their traditional roles.

Involve women in planning, training, implementation and evaluation of the project's technical and productive activities.

Create incentives to reduce school drop-out rates, and monitor closely potential drop-out of girls as a result of project activities.

Develop and implement strategies to inform men on the importance of family planning to the health of women and the family.

Sensitise policy makers, planners and rural development agents to demographic issues in relation to women's position and their involvement in rural agricultural development.

Study the extent of knowledge about family planning as well as the attitudes of planners who inform women about contraceptive methods and provide services. Promote anthropological research on child rearing practices, including studies of parental roles and responsibilities in various settings; of decision-making roles in the family and community; of the cost and value of children; and of the constraints faced by women in taking advantage of population control programmes.

Analyse cultural and religious values as well as socio-economic, legal and political factors to determine their impact on gender inequality in the labour force, in community affairs, and in the benefits that women derive from social services.

ANNEX I
GENDER ANALYSIS APPLICATIONS

For analysing technical feasibility

For analysing socio-economic feasibility

For making men and women visible in analytical tools for project design

A project will usually commence with a review of its technical, socio-economic and institutional feasibility. Gender analysis should be an integral part of the feasibility review. Key aspects to be covered include the project's socio-economic, financial, technical and managerial viability and sustainability. Existing information on the project is evaluated, and any gaps in data or changes in the programming environment are identified. Once the mission information is collected and analysed, recommendations for the detailed project design can be formulated. Analytical tools such as a problem tree or flow chart should reflect the gender analysis results.

Often, there is little available information on the situation of women vis-à-vis men in the project area. A feasibility study or project definition mission offers a good opportunity to develop or improve this database. Through interviews with local government officials, representatives of non-government organizations, local WID specialists, project personnel from previous phases and, more importantly, the local women, the objectives and assumptions of the project regarding women can be confirmed or adjusted as required. This information can be used as baseline data for monitoring and evaluating any changes in the situation of women as a result of the project. If a project is large enough to justify the expenditure, a full household survey could be conducted; otherwise, structured interviews should suffice.

I. Technical Feasibility

Gender constraints which may be brought to light by the technical feasibility analysis include insufficient resources, meaning that less support can be given to women's activities. The introduction of new technology may adversely affect women's employment opportunities and wages. For instance, in Indonesia women lost their jobs when new rice-harvesting technology was introduced. Such constraints can be foreseen by analysing the effect of a change in conditions on the activity profile: is women's participation promoted or hindered? Arrangements should be made to provide compensation for:

- labour input (reduced, increased, work pattern/habits, qualifications, social acceptability)
- raw materials (storage, marketing)
- quality improvement of outputs requiring new packaging, transport, marketing strategy
- input supply requirements and their competitive value (water, fuel, power, chemicals)
- hardware maintenance/spare parts
- management and technical training, particularly for those displaced from traditional jobs.

II. Socio-Economic Viability

Many projects are planned with the household unit as the target group. Unfortunately, there is a tendency to view the household as a homogeneous unit. It is assumed that all members will benefit equally from the project, when, in fact, one group may benefit at the expense of others. As a result, the project design fails to recognise the different roles, contributions and control over resources and income, of male and female children, women and men.

In order to assess the potential social and economic impact of a project, it is necessary to know men's and women's characteristics and their natural and cultural environment, as related to the project's objectives and activities. The degree of detail will depend on the nature and scale of the project. For example, if the project involves new technology for agricultural production, then the gender division of labour for each agricultural activity should be known (who is responsible for land clearance, preparation, seeding, weeding, processing). The following elements could be included in a gender analysis exercise.

Production of Goods and Services

- Which productive activities do women perform, and which do men perform?
- How much time is spent on these tasks?
- Where are these tasks performed (often reveals the level of female mobility)?
- What access do women have to resources needed to carry out their productive activities (e.g. technical assistance, credit, equipment, transport)?
- Who controls the benefits (such as income) derived from each activity?
- Are there any legal, business, or socio-cultural determinants in the existing gender division of labour, and in access to and control over resources?
- Are there variations on the above due to ethnicity, religion or social/kinship structures?
- Are there variations on the above in cases where heads of households are female?

Reproduction and Maintenance of Human Resources

The potential for involving women in projects tends to be determined more by the interrelationship of productive and family maintenance tasks than is the case for men. Therefore, it is important to know who does what in the home. Who is responsible for child care and domestic chores (preparing meals, collecting fuel and water)? How much time is spent on these activities? Where are these activities performed?

Representation of Women in Local Institutions

How many women participate, and in what capacities, in the local government, credit groups, cooperatives and community councils?

Consultation with Local Women

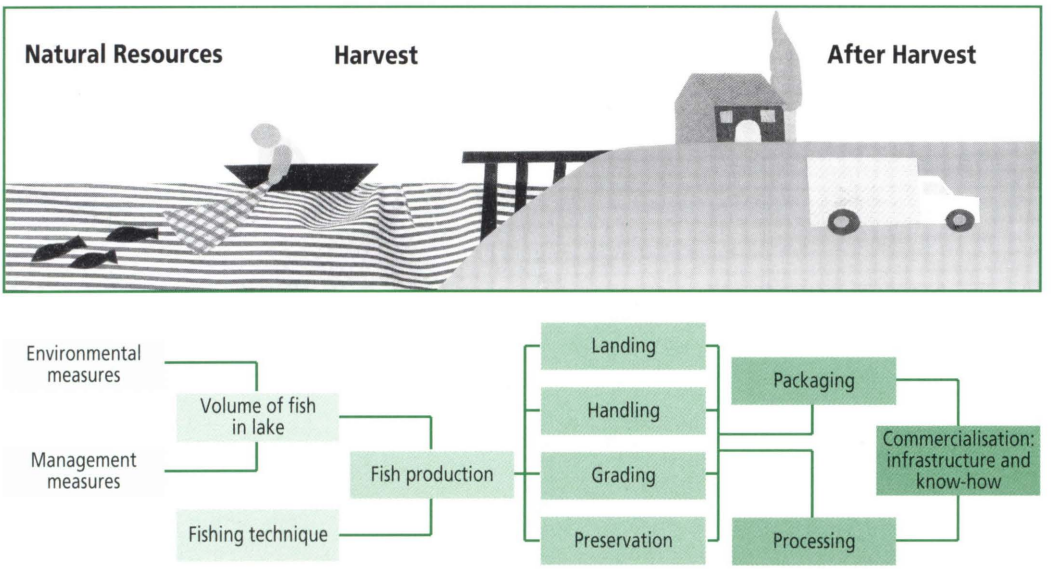
During the project preparation stage, every effort should be made to elicit the views, needs and priorities of women regarding the project, and to build on their interests and needs to change their own situation. Women often lack effective channels for expressing themselves in society and are not well enough informed about development possibilities to make appropriate requests. This avenue can be opened up through taking the initiative of discussions with the women.

Impact Analysis

Based on the data collected, the project design can be assessed in terms of attention to women and implications for project success. If the project does not adequately address women's roles as agents and beneficiaries of development, now is the time to adjust the design.

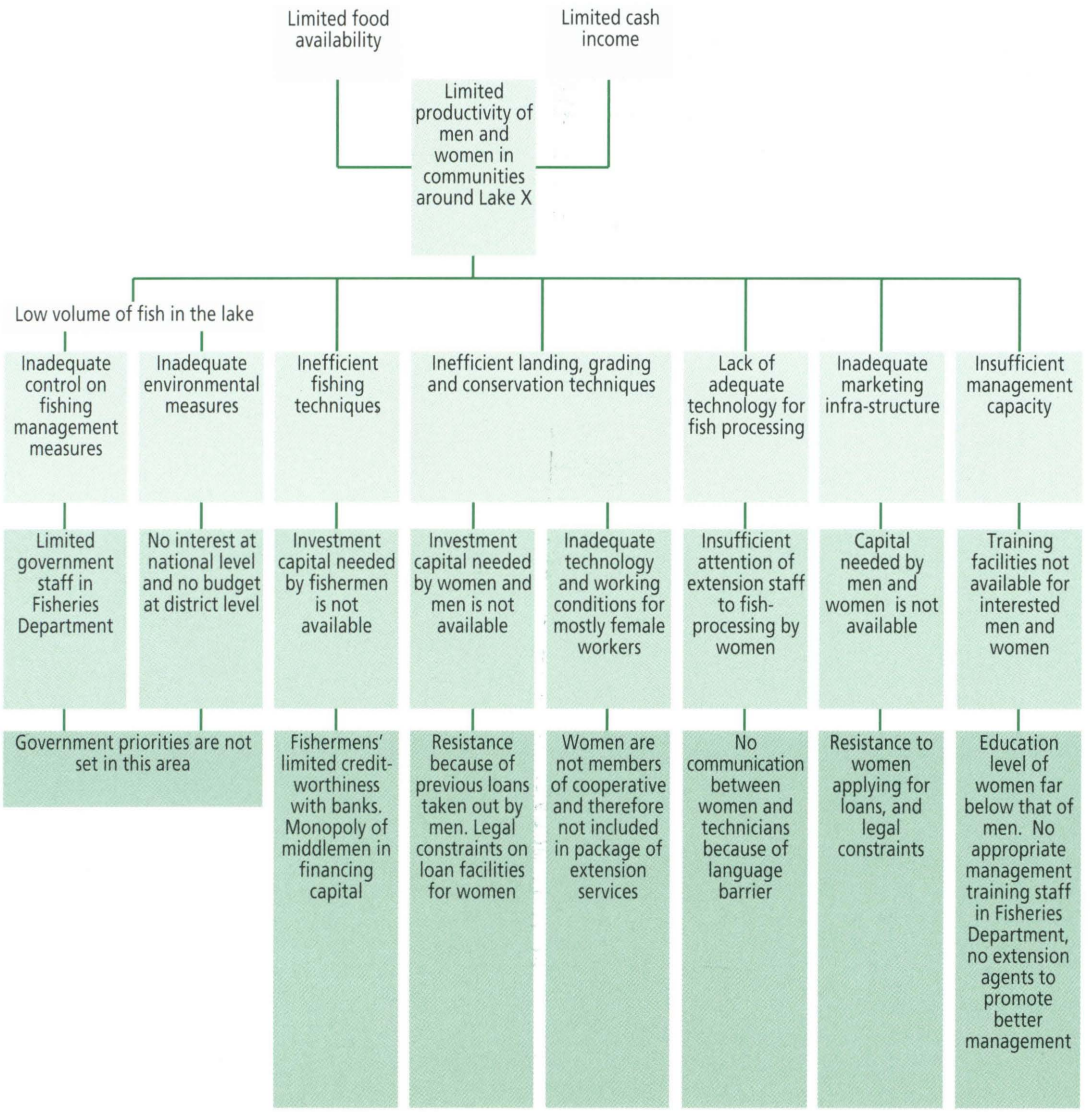
III. Making men and women visible in a problem analysis

a. Flow chart



III. Making men and women visible in a problem analysis

b.Example of a problem tree



ANNEX II

RESEARCH TOOLS IN PARTICIPATORY PROJECT CYCLE MANAGEMENT

PARTICIPATORY RESEARCH METHODS

Action research is a research approach, directed not at forming a theory, but at direct and rapid implementation of a result. It is conducted in close cooperation with those affected (farmers, water users, representatives of the authorities). Implementation takes place in stages, in which feedback permits interactive learning and the continual revision of measures under consideration.

Participatory action research, like programme planning and evaluation, should be guided by the following principles:

1. Systematic participation of the target population.
The choice of level of participation will be influenced by budgetary and time constraints of both the target population and the project implementors. Once the target population is identified for the purposes of project development, it should ideally be enabled to participate in all subsequent decision making and in activities related to the project development process.

2. Skilled and organised participation.
Normally, target populations and their representatives cannot spontaneously participate effectively in the project process. Some instruction and guidance is required in relation to methods of data collection and analysis. Moreover, effective participation must include systems for feedback and accountability, otherwise there is a danger of unrepresentative input by the target population.

3. Integrated research and action.
Where the target population is enabled to participate in the project process, the research is undertaken on the clear understanding that the data are needed for action to overcome disadvantages affecting the target population.

4. Cooperation and dialogue.
The relationship between the target population and external researchers must be one of cooperation in data collection, and mutual respect for the knowledge that each is able to generate. Open dialogue is essential.

5. Shared ownership.
It must be reciprocally acknowledged that the data collected and analysed are the property not only of the external researchers/project- managers, but also of the target population.

Participatory research methodology has introduced group interviewing, projective techniques, case studies, guided group discussions, and learning forums.

The disadvantages suffered by women generally result in low levels of literacy and education, lack of organisational participation, and possibly cultural restriction or isolation. Accordingly, data collection methods which rely on group discussion, life history traces, projective techniques and content analysis will often be more appropriate.

INSTITUTIONAL ASSESSMENT METHODS

Participant/Activity (PA) Matrix

The PA matrix is generally used for clarifying and analysing who is doing what. Essentially it is a matrix of the various activities undertaken in a project (listed vertically) and the various participating agencies which are (or should be) involved in these activities (presented horizontally). Once this matrix is considered it presents an easy overview of two important issues:
- Which are the various agencies involved in one particular activity?
- What are the various activities in which a certain agency is or should be involved?

But the real usefulness of the PA-Matrix is analysing the two crucial questions:
- through horizontal analysis: is the combination of agencies involved in an activity appropriate and adequate to meet its requirements? In other words: are the right organisations involved for supporting a gender-sensitive project? And do they coordinate their respective efforts and inputs effectively and efficiently?
- through vertical analysis: looking at a particular agency and the list of activities in which it is or should be involved, the next question is: is that agency equipped to carry out those activities? Does it have the human and financial resources, skills (e.g. technical, gender-specific and participatory) and other resources that are required?

Institutional Capacity Analysis System (ICAS)

ICAS considers institutional capacity as the ability of the agencies involved in the implementation of a project, as well as with project results, to carry out their tasks effectively. This ability or capacity is assessed: (I) from the viewpoint of the national (or other applicable) policy environment; (II) by considering the relevant laws; (III) on the basis of a thorough description and analysis of all tasks that need to be executed; (IV) by considering how effectively the execution of tasks is organised; (V) by considering the appropriateness of personnel policies; and (VI), by investigating the suitability of personal aptitudes, professional culture, etc. Thus, the analysis moves from the general, via a detailed analysis of tasks, to the specific. The analysis considers effectiveness, suitability, and appropriateness from men's as well as women's points of view.

ICAS relies predominantly on the use of pre-formatted forms and questionnaires, and structured interviews. Interviews are conducted with male or female informants who are known or suspected to be knowledgeable about one or more of the above mentioned aspects of institutional capacity (policy environment, legislation, etc.), and those closely involved with project implementation. Informants in these two groups will often coincide. Phase I of the analysis then focuses on identifying so-called institutional capacity deficits (ICDs), while Phase II concentrates on developing a viable strategy to deal with these deficiencies.

RAPID APPRAISAL

Rapid Appraisal methodology enables efficient and effective data collection during the initial phases of the project cycle.

Some Methods for Rapid Appraisal [1]

1. Reviews of existing reports and databases
2. Direct observation
3. Semi-structured interviewing
4. Key informant interviews
5. Group interviews
6. The "Sondeo"
7. Mapping and transects
8. Projective and interpretive techniques
9. Informal surveys
10. Profiles
11. Group discussions
12. Focus groups
13. Community information and planning system
14. Reconstruction of events
15. Case studies
16. Questionnaire method
17. Seasonal calendars

1. Reviews of Existing Reports and Databases

Reviews of existing reports on Gender/WID situation by government and non-government organisations, as well as other donors, regarding :

- existing initiatives to promote women's integration in development within the sector
- lessons learned
- potential for the European Community to build on this work and/or develop complementary WID initiatives in the sector
- existing statistical data, such as Women Country Profiles
- existing gender expertise.

1 Descriptions taken from Lingen ISSAS - Rapid Rural Appraisal, 1992 (except n°5)

This review can be carried out by contacting government or non-government organisations, or other donors, such as national machinery, United Nations Development Fund for Women (UNIFEM)[2], UNDP, World Bank, Member States' embassies, and bilateral development agencies, such as CIDA, USAID, ODA, DANIDA, NORAD. Also, the Joint Government Donor Coordination Committee and/or a WID donor coordination committee could be useful (they can be traced through UNDP/UNIFEM).

2. Direct Observation

Looking first-hand at the conditions, agricultural practices, relationships, the participation of women in community decisions, etc. and noting down the main findings. An observation checklist can be used. Observations are annualised afterwards for patterns and trends.

Direct observation can be useful where prior assumptions, risks and conditions need to be validated, and in time-use studies of men's and women's productive and reproductive labour. There can be a substantial difference between what is stated in an interview, and what is actually done and observed.

In almost all stages of a study, once credentials and confidence have been established in the community, one form of observation which is rather time-consuming, but well worth the effort if it can be arranged, is participant observation. It takes observation one step further, engaging the observer in the actual work and routines of the people for a period of time.

3. Semi-Structured Interviewing

This is interviewing in an informal and conversational way, structured by using a checklist of topics. Only a few of the questions are predetermined, and the order of questions and topics is not fixed. Questions about key issues are asked in an open-ended and probing way. Interviewees are usually not selected randomly; rather, purposive samples are taken from varied interests in the prospective project area.

Semi-structured interviewing is useful for obtaining information on specific topics, for analysing problems and opportunities, and for discussing plans. Semi-structured interviews with individual women and men will be an important method for obtaining the necessary information. Interviewers should look for situations and places where women can express themselves freely.

The interview schedule is divided into topics, and under each topic is a series of questions which can be asked in the order presented, or in any order which seems appropriate to the situation. Probing questions can and should be asked, to elaborate on any of the questions.

The actual interviews are done by a team which includes men and women. Parity is an important consideration here. Equal or proportionate numbers of rich/poor, men/women, remote/close, old/young interviewees should be questioned.

4. Key Informant Interviews

Key informant interviews involve a select group of individuals who are likely to provide the required information, ideas and insights on a particular subject. Careful selection of individuals who have long experience of a community or area, or have specialised experience in the area over a period of time can be especially useful for assessing critically the individual perceptions of study team members. A list of issues to be covered during the interview can be used. Caution should be used, and the comments or observations of a key informant should always be validated by at least one other source. Women's organisations should be consulted, and women should be interviewed separately from men, as well as together.

Key informant interviews are useful in revealing underlying motivations and attitudes of a target group, and in generating suggestions and recommendations.

5. Group Interviews

The interview, with or without an interview guide, can be adapted to small or medium-sized groups. The composition of the group will depend on the purpose of the interview. The interviews can be pre-arranged, or can take place informally during a village visit.

Differing responses can be discussed by participants in the group, thus introducing an element of cross-checking and validation which may not be present in individual interviews. A specialised

2 UNIFEM was established during the UN Decade for Women and can be found through local UNDP Offices.

group, a panel, may be convened once or several times to discuss a particular concern or question. Similarly, once-only focus groups may be convened.

Interviews with groups of women will usually be one of the methods used to gather information on women's experiences and viewpoints. The information supplied in these interviews can best be gathered through informal conversations with men's or women's organisations, and by cross-checking the results. Alternatively, the researcher can take steps to ensure equal female and male participation in mixed groups. It is crucial to plan in advance how women's experiences and viewpoints can best be gathered.

6. The "Sondeo"

A larger team composed equally of technicians and social scientists, including both women and men, work in different pairs for several days until each technician has worked with each social scientist. They meet at the end of each day to discuss their observations or interviews, and prepare priorities for the next day.

This method has the advantage of introducing new people to an area fairly quickly and providing a very dynamic interdisciplinary learning environment. There is no reason why local people could not be incorporated in such a process, providing a still more useful learning context.

7. Mapping and Transects

This approach is used to establish the distribution of resources/ water/ land/ forest/ etc. among social, class or ethnic groupings.

Drawing maps by hand and laying-out observation paths (transects) is a fundamental process which helps reduce bias in selecting interviewees and observation points. Maps are also indispensable for gaining insight into the terrain, the distribution of resources, soils, animals, etc. Maps can reveal relationships and disparities between different groups in a village or an area which are not immediately obvious from discrete observations.

8. Projective and Interpretive Techniques

Methods and for learning from local people are continually developing, but direct dialogue and discussion in the local language is necessary. Various projective and interpretive techniques may be used which engage participants in discussion about their own understanding of a situation, or their consideration of the local categories by which they organise their ideas and activities.

For example, photographs of people engaged in their daily activities may be used to develop a discussion about their reality. Single photographs may be used on their own, e.g. portraying different generations of women. Alternatively, contrasting pictures, perhaps of women at work and another of men, can spark off a discussion. From a number of pictures, people can be asked to group those which are similar and those which are different, or those which portray development and those which do not. Discussion can then revolve around why the groupings were chosen. Alternatively, people might be asked to prioritise pictures according to some criterion, e.g. the degree to which they portray important problems.

In addition to photos, almost any form of expression can be an opening for discussing and understanding local reality - the meanings of village drama, stories, songs, proverbs, drawings, artifacts, for example, can be queried. Games can be adapted for similar purposes.

9. Informal Surveys

Informal surveys are small-scale surveys concentrating on a few variables. Structured questionnaires are used.

An informal survey is useful when quantitative information is needed about a relatively homogeneous population. However, the data cannot be used for generalisation or statistical analysis.

10. Profiles

a) Activity Profile

An activity profile identifies relevant productive, reproductive and community activities of an individual. It may also indicate the time, frequency and location of work.

Information can be gathered from different categories of men and women on their activities: what is done, when, how long it takes, how often and where.

An activity profile is useful for obtaining information on the gender division of work and women's workload.

b) Daily Routine Profile
The daily routine diagram gives typical activities for each hour of an individual's day. Activities are recorded through interviews, observation or by keeping diaries. Comparisons between different people can be made, e.g. men/women, rural/urban women, old/young, and between different seasons.

A daily routine profile is useful in determining the burden of women's responsibilities and the appropriate schedule for future activities, and for cross-checking information on women's tasks.

c) The Access and Control Profile
The access and control profile records women's and men's access to and control over resources and benefits. It identifies and lists the resources; columns indicate whether or not women and men have access to and control over their use. Information for the profile is gathered through semi-structured interviews.

The access and control profile is useful for analysing the initial situation, as well as the project impact in relation to resources.

11. Group Discussions

Brainstorming, analysis, presentation or discussion sessions, in the field or in the meeting room, with members of the target group, key informants, etc. The sessions must be well prepared by defining objectives and tools to be used.

Group discussions are useful for gaining information on and insight into perception and views. Also, they encourage analysis of situations and problems. The method can increase mutual awareness within a group, or generate data on the level of knowledge possessed by the group. Group discussions may be used to involve the target group in research and planning. Visuals are a powerful instrument for involving (illiterate) women.

12. Focus Groups

Focus groups are a convenient way of gathering qualitative information and identifying salient issues. Both homogeneous groups (e.g. professional women) and heterogeneous groups (e.g. men and women) are used. Issues identified by the group can subsequently be used for interviews with key persons, such as decision makers.

13. Community Information and Planning System

An instrument much used by NGOs who cannot provide a lot of direct support but can organise people, giving them training and other educational opportunities so that they can decide on and implement a plan.

Community members are trained in research, planning, project implementation and consultation facilitation through representation in committees at the appropriate stage. The community members have to decide that they want to go through the process of gathering information on what they do and do not have in the community, to help them making a decision on priority improvements to the community. On the basis of their decisions, activities are planned in terms of what resources, time, people and funds need to be mobilised. The community has to be informed of the results of these committees' work via consultation with the community members.

This method uses the principles of Participatory Action Research applied at community level.

14. Life History Trace

This is employed where individuals or groups are aware of a problem through its effects, but are not aware of the causes. Methods of structural analysis adhere to this pattern. When time permits, a one-to-one approach with individuals should be adopted.

The life history trace method enables an individual or a group to begin with a current experience and then trace the genesis of forces which have contributed to its emergence.

15. Case Studies

These are used when it is necessary to create an individual or first-hand involvement in describing a problem. The case study data-gathering method focuses on a particular individual, group or problem. It provides in-depth and mostly qualitative data. In participatory research, an individual

or group can be helped to engage in this type of data-generating activity.

16. Questionnaire Method

This method is employed when:
- confidentiality is required to obtain valid information
- respondents are literate or not intimidated by paperwork
- data have to be obtained from a large area or population.

The structured questionnaire consists of a set of questions which can be self-administered by respondents, provided they are literate.

Normally, the questionnaire is highly structured. This guarantees that the data obtained can be cross-tabulated and quantified. It also limits the sensitivity of the instrument. Questionnaires should be pre-tested to increase their accuracy.

A variant of the questionnaire is the interview schedule which is administered by a trained interviewer.

17. Seasonal Calendars

These seasonal calenders present variations during seasons according to the perceptions of local people. Villagers are asked to make diagrams of changes in certain items throughout the year. This can be done by making piles of e.g. stones (to represent relative quantities and patterns), or by drawing histograms. Items suitable for diagramming include income, agricultural and non-agricultural labour, prices, illness and water use.

Seasonal calendars are useful for exploring seasonal constraints and opportunities, also according to gender.

DATA PRESENTATION

The recording or presentation of data is a challenging task for researchers with a commitment to participatory research, rapid appraisal methods and qualitative indicators. It must be done in a format that makes sense to researchers, evaluators and the people providing the data.

1. Tabular forms.

The presentation of data in frequency distributions, cross-sectional and more complicated multi-variate tables constitutes the most common conventional method. For the most part, tabular presentation assumes quantitative data amenable to scoring, percentaging or frequency distribution. Tabular presentation of data can be quite useful in the recording of baseline measures. Using such tables to present data to disadvantaged groups is, in almost all situations, a waste of their time. Tables can be very important in making presentations/reports to the bureaucracy or agency officers.

2. Bar and line graphs.

Bar graphs provide a visual representation of proportions or percentages of a variable possessed by groups or categories of people. The bar graph allows comparison of groups on a particular variable. Line graphs express the relationship between two variables, e.g. income level by age level of a group of people, level of production by year, etc.

3. Pie charts.

Pie and other charts, again, provide a visual representation of the distribution of a variable for a group or community. They are particularly useful in providing a snapshot picture of a variable which will be used as a baseline measure at a particular point in time. For instance, the proportions of land held by different classes of owners.

4. Flow charts.

These are most useful in tracing cycles of production and marketing, or resource use. Again, data for these are obtained primarily through observation and interviews. Missing links in a flow, or points where inequity and exploitation take place, become easier to identify and can be helpful in determining measurable objectives.

5. Diagrammatic histories/time lines.

Using guided or informal interviews, key informants or prior documentary research, a historiographic picture can be built up of key natural and social events in the area. These time lines are especially useful in discerning longer-term trends and constraints on development.

6. Decision trees.
These are similar to flow charts, but stress key decision points and the factors which go into these decisions. Proposed innovations from a project can be entered into such decision trees to try out with people whether they are realistic.

OFFSETTING BIASES

Possible biases which obscure contact and learning with the people have to be acknowledged and systematically offset. The following biases may interfere with the obtaining of valid and reliable data:

1. Spatial biases: a tendency to collect data in the more accessible parts of a project area. Residential areas close to public roads often differ significantly from those reached only by footpath.

2. Gender biases: interviewers tend to assume that male leadership and workers represent all decision-making, social awareness and productive work in the community.

3. Professional or class biases: researchers tend to rely on information provided by elites, formal leadership, professional and semi-professional workers.

4. Literacy and class biases: predispose researchers to collecting data from people who are literate and articulate in the language of the interviewer.

5. Seasonal biases: predispose researchers to collecting data when the people are less vulnerable to environmental and climatic inclemency, or when they are busy planting or harvesting.

6. Structural biases: predispose researchers to collecting data selectively, in keeping with existing organisational objectives, programmes and procedures.

Any researcher or implementing agency proposing to collect project-related data should be questioned on provisions or strategies to avoid or overcome these biases.

SHORT CUT TO BASELINE DATA

The objectives and assumptions of the project regarding women can be confirmed or adjusted using baseline data gathered by "short cut" methods. This can be done through interviews with local authorities, with representatives of non-governmental organisations, with local WID specialists, personnel from previous project phases, or better still, from the local women themselves. This information can be used as baseline data for monitoring and evaluating any changes in the situation of women as a result of the project. If a project is large enough to justify the expenditure, a full household survey could be conducted; otherwise, structured interviews should suffice.

ANNEX III

DEVELOPMENT OF A FINANCING PROPOSAL

This annex provides a sample list of Gender/WID details to be included in all sections of the financing proposal.

Summary
Title, location, duration, cost and gender-specific objectives, components, expected beneficiaries, implementation and monitoring arrangements.

Logical Framework
Gender-specific components in the Logical Framework.

Background
a) Origin of the project
b) Previous European Community aid in the sector, its impact on/experience with gender and how proposal fits in European Community strategy for gender development in this country.
c) Sector characteristics: relative importance of the sector to women and men, main constraints faced by each sex.
d) Nature of problem to be addressed: analysis of the extent to which gender differences and the roles of women affect the basic problem, e.g. inadequate transmission of technologies to farmers.
e) Relationship of project to countries, policies, plans/ strategies, and priorities, explicitly referring to Gender/ WID policies.
f) Activities of other donors, stating what specific attention they give to gender.
g) Documentation available (existing studies, preparation documents, evaluations, specify existence of gender-specific documentation).

Justification
a) General policy environment: potential and constraints at policy level and their effects on each gender.
b) Technical: participation in technical improvements in terms of determining suitability of project location, appropriateness of planned inputs and their cost effectiveness.
c) Economic: summary of economic analysis, highlighting gender impact of economic improvements in terms of access to, control and decision making over benefits (investments as well as financing constraints).
d) Social and environmental: summary of social and environmental issues, covering:
- social/gender analysis of activity profile, access to and control over resources and benefits, influencing factors (give details);
- conditions for community participation by gender (land tenure, population and migration);
- differentiated impact on unemployment, migration, increase in female-headed households;
- environmental impact;
- need for further studies.

e) Institutional: brief description of institutions involved, and assessment of strengths and weaknesses; gender-specific expected improvements in terms of access to, and appropriateness of, support services.

Cost and financial arrangements
a) Summary of costs: contributions from the European Community and estimated annual disbursements of total expenditure, arrangements for cost overruns, arrangements for accounting and auditing any European Community contribution if local cost, cost recovery.
b) Flexibility of financial arrangements, including human/financial needs for inception phase, WID expertise, gender training and institutional development, research and backstopping.

Implementation
a) Organisation of project implementation.
b) Definition of respective responsibilities of bodies concerned with implementation.
c) Obligations of recipient country institutions/agencies involved.
d) Tendering arrangements (including guidelines given in Section 3.5).
e) Administrative work plan.
f) Expected timing of implementation (ensure time and means for inception phase).
g) Arrangements for operation of completed project.

Monitoring and evaluation

a) Gender-specific criteria established for measuring progress.

b) Means of monitoring and arrangements for collecting gender-disaggregated baseline data, covering quantitative and qualitative tools (detailed).

c) Recommendation of an ex-post evaluation.

d) Recommendation of any special monitoring for social/environmental indicators.

Risks

Factors beyond the control of the project but which may yet cause its failure can include:

a) the degree of receptivity to Gender/WID in the government structures of the recipient country;

b) legal constraints regarding women's access to resources;

c) socio-cultural barriers to the execution of a project;

d) the qualifications and availability of the human resources necessary to integrate women into projects in a non-traditional sector.

Special Conditions

Refers to commitments and obligations of the recipient government or local bodies, as well as special conditions attached to this project/programme.

ANNEX IV

CHECKLIST FOR GENDER SENSITIVITY IN THE LOGICAL FRAMEWORK

QUESTIONS TO CHECK THE GENDER SENSITIVITY OF A LOGICAL FRAMEWORK MATRIX

Project structure	Indicators of achievement
WIDER OBJECTIVES Are wider objectives addressing problems of men and women? Does the choice of specific objectives influence relations between men and women?	**WIDER OBJECTIVES** Consistency check with the gender-specific policies of government or of relevant organised groups. To what extent are wider problems addressed gender-specifically at the policy or institutional levels?
OBJECTIVES Do the objectives distinguish between men and women in specifying WHO is targeted and WHO is expected to benefit? Who participated in choosing from the variety of needs to be addressed? What practical and strategic needs of men and of women are addressed by the project?	**OBJECTIVES** In qualitative and quantitative indicators: What improvements and changes are expected for women and men? Who is expected to benefit, in terms of gender division of labour and access to and control over resources gained? Were these indicators defined with participation of target group? To what extent will improvements and changes affect gender relations?
OUTPUTS Are the outputs specified separately for men and women? Are they consistent with the needs of the groups specified?	**OUTPUTS** What has been achieved for men and for women in terms of: • use of appropriate technology? • adequate policy measures supporting the project? • environmental protection measures? • building up institutional and management capabilities? WHO (men and/or women, age, class, ethnic background) benefited in reaching each of the outputs? TO WHAT EXTENT, IN WHAT CAPACITY did men and women participate?
INPUTS Are the inputs appropriate to the involvement of both men and women? Is there time and a budget for participation and for gender analysis? Are budgets flexible and reviewable, and has time-planning provided for the possibility of new activities in response to women's constraints? Has local gender and training expertise been used to the maximum extent possible?	**INPUTS** How accessible and appropriate are project goods, services and facilities for men and women? Are contingencies provided for in work plan and budget? Is provision made for participatory monitoring and evaluation? What resources have been devoted to addressing women's strategic needs?

How indicators can be assessed	Assumptions, risks and conditions
WIDER OBJECTIVES Will participants organised at national level be able to provide data? What alternative data resources can be used to check consistency?	**WIDER OBJECTIVES** Do the policy framework and legislative climate support the participation of both men and women in reaching objectives? Is the political climate favourable to a participatory approach? Is the policy and institutional context supportive of activities in the sector addressed by the project?
OBJECTIVES Was a gender analysis carried out in time to serve as a basis for targeting of activities? Is a strategy set out to tackle constraints? Are participants' views on impact considered in mid-term and/or final evaluations?	**OBJECTIVES** Are the objectives supported by policies? By other activities nationally or regionally, which will complement or endanger the planned improvements? Have these been taken into account or linkages provided for?
OUTPUTS Do progress, technical, monitoring and evaluation reports include gender-specific qualitative as well as quantitative data?	**OUTPUTS** Is the social or political status of men and women in the target group such that their interests pose a threat to gender-specific project outputs? Is there sufficient motivation, skills and organisational capacity among target group and partner organisations to encourage and participate in gender-sensitive project activities?
INPUTS Are participants consulted (men and women separately) on the appropriateness of inputs during monitoring visits, staff meetings, auto-evaluations, mid-term and final evaluations?	**INPUTS** Is the participation plan reasonable in terms of local constraints (seasonal, cultural, gender-related, financial, other) which might reduce women's agreement or ability to participate or affect their confidence? Can the project help them to participate? Is gender expertise adequate and is it used early enough?

ANNEX V

GENDER/WID IMPACT ASSESSMENT FORM

GENDER/WID IMPACT ASSESSMENT FORM

EEC

Situation as at: ...../ ...../.....

Budget: .....

Directorate: .....

Sector or subsector: .....

Responsible official:.....

(Country): ..... **-ALA / MED**

Title: .....

Source of proposal:..... **Date:** .....

1. The Gender/WID Impact Assessment Form is a tool for helping administrators, together with consultants for missions in the field, to manage the nature and quality of the incorporation of gender/ WID into the project cycle in the projects for which they are responsible.

2. The Form covers both gender integration (GID) and the integration of women (WID) in the following ways :

a) The questions in Section I (Evaluation of GID in project cycle management) deal with the Logical Framework and gender-sensitive management of the project cycle. The results of the gender analysis must be integrated in the original Logical Framework, and taken into account in all subsequent reports. The necessary explanations are given in Chapter 2.

b) The questions in Section II (Analysis of women's participation in development) deal with the nature and quality of WID. The form follows the OECD/DAC WID criteria (see Chapter 1, Section 1.5) which have been developed to measure the participation of women in development.

3. The consultants responsible for missions in the field will answer the questions in the form in all their mission reports (preparatory, revision, evaluation, final and ex-post).

1. EVALUATION OF THE NATURE AND QUALITY OF GENDER INTEGRATION IN DEVELOPMENT WITHIN THE MANAGEMENT OF THE PROJECT CYCLE. THE LOGICAL FRAMEWORK.

(project preparation, mid-term review and final evaluation)

1.1 Objectives

Whose needs and interests are targeted in the immediate objectives? If women are not mentioned, what is the reason? What practical and what strategic needs are addressed?

Needs and interests addressed in objectives:

	Women	Men
Practical needs		
Strategic needs		

1.2 Outputs

Which project outputs directly relate to women's needs, and which to men's needs?

1.3 Inputs

Has a social/gender analysis been carried out to identify constraints to women's participation in project activities?

What measures and/or inputs are contemplated to overcome these constraints?

1.4 Monitoring and Evaluation

What provision is made for monitoring and evaluating the nature and quality of women's and men's integration and participation in objectives, outputs and inputs?

What provision is made for monitoring and evaluating project impact on men's and women's access to, and control over the benefits generated by the project?

II/ WID IN THE PROJECT CYCLE
ANALYSIS OF WOMEN'S PARTICIPATION IN DEVELOPMENT
OECD/DAC WID CRITERIA

A. In which category can your project be classified?:

Women-Specific Project ❑
WID-Integrated Project ❑

B. Explain the project's activities and achievements regarding each of the following points:

1. Are women's needs and interests included in project design, through either direct consultation, consultation of local Gender/WID experts, or documentation reflecting the views of women?

2. Do women from the target group participate actively in project implementation?

3. Have constraints to women's participation in the project been identified, and have conditions (including financial conditions) been created in order to enhance their participation?

4. Is Gender/WID expertise planned and budgeted throughout the project cycle?

Activities (Preparation)	Achievements (Revision/Evaluation)
1.	1.
2.	2.
3.	3.
4.	4.

ANNEX VI

GLOSSARY OF BASIC CONCEPTS

Activity Profile
The profile identifies men's and women's activities, and where and when they are carried out. It is based on a division of labour according to gender and delineates the productive and reproductive activities of the population in the project area, first by gender, then by age, ethnicity, social class or other distinguishing characteristics. The profile also indicates the location of the activities and the amount of time spent by individuals in accomplishing them.

Anti-Poverty Approach
The anti-poverty approach links economic inequality with poverty, rather than with unbalanced gender relations. It focuses mainly on women's productive roles and on the need to provide them with better access to productive resources. The approach meets practical gender needs if it leads to more employment opportunities for women, but strategic gender needs are only met if responsibilities other than productive responsibilities are considered and shared.

Data Disaggregated by Sex
The collection of information in surveys on the basis of gender, e.g. data on the status and socio-economic roles of different groups of men and of women. The analysis of results on the basis of gender.

Efficiency Approach
The efficiency approach concentrates more on the development process and less on women. Women's unpaid time is taken as a self-help component in economic activities, particularly in human resource development and the management of community problems. This approach assumes that women's unpaid labour in areas such as child care, fuel gathering, food processing, preparation of meals and nursing the sick is elastic. The efficiency approach addresses women's practical gender needs, but at the price of longer working hours and more unpaid work. For these reasons the approach does not meet strategic gender needs.

Empowerment Approach
This approach identifies women's participation in decision-making. It seeks to increase self-reliance and self-confidence so that they will become more active players in society. Taking this approach and following it through for the incorporation of gender into the project cycle, attention should be given to the fact that women and men experience development differently according to race, class, colonial history and current position in the international economic order. Structures and situations should be addressed simultaneously at different levels, to ensure that women gain increased access and control over crucial material and non-material resources. Based on the participatory approach to planning and implementation.

Equity Approach
The equity approach recognizes that women are active participants in the development process, and in economic progress, through their productive and reproductive roles. The basic assumption is that economic strategies often have a negative impact on women and that women should be 'brought into' the mainstream of the development process, through access to employment and the market-place. Thus women's practical gender need to earn a living is recognized. The approach aims at meeting strategic gender needs by addressing equity at the market-place, and links economic independence with equality. It does not take up the need to balance productive, reproductive and community roles between men and women.

Female-Headed Households
Households in which no adult males are present (due to divorce, separation, migration, non-marriage, widowhood). Households in which men, although present, do not contribute to the household income (due to illness, alcoholism, drug addiction, etc.).

Gender
The different roles, responsibilities and expectations of men and women in societies and cultures, which affect their ability and their incentive to participate in development projects, and lead to a different project impact for men and women. These roles, which are learned, change over time and vary widely within and between cultures.

Gender Analysis
Seeks to document and understand the roles of men systematically and women within a given context. Key issues include a) the division of labour for both productive and reproductive activities; b) access to,

and control over, resources and benefits; c) social, economic and environmental factors which influence both of the above; d) decision-making capacity.

Gender in Development, GID
GID addresses the specific roles, responsibilities and expectations of women and men in development efforts. The focus is on the relation between the different actors in the field.

Gender Blindness
The inability to perceive that there are different gender roles and responsibilities, and, consequently, the failure to analyse policies and projects in terms of the differences in their effects on women and men.

Gender-Differentiated Impact
Activity results which have different effects on men's and women's lives.

Gender-Sensitive Planning
Planning which takes into consideration the impact of policies and plans on women, and is sympathetic to women's needs.

National Machinery
A government entity responsible for coordinating, and/or providing support for, initiatives on behalf of women at the national level. Frequently, the national machinery is the government's women's bureau or a large women's non-government organization which is supported by the government.

Practical Gender Needs
The needs of women and men related to their existing roles in society: what people need in order to do their current jobs more easily or efficiently. Projects can meet practical gender needs without necessarily having any impact on the relationship between men and women in society.

Strategic Gender Needs
The needs of women, in particular, to obtain greater equality in their status through changes in their roles, responsibilities and decision-making capacities within their society.

Welfare Approach
The welfare approach is a social-policy approach for the benefit of a vulnerable group in society. It is based on the assumption that women are passive recipients of development and that their family role is their most important role. Concern for the physical survival of families leads to concern for the provision of goods and services, a focus on the nutritional needs of women and children and, more recently, on family planning. The welfare approach meets some of the practical gender needs of women, but not their strategic gender needs, because the traditional "natural" position of women is not questioned.

Women's Components in Mainstream Programmes and Projects
Special attention can be given to women in projects through the inclusion of a special women's component. This can either benefit women or isolate them. If the component focuses exclusively on women's family role, then it diverts attention away from their economic role. The approach does not do away with the need to pay attention to the role of women in the project as a whole.

Women's Focal Points
Individuals within an organization (e.g. in government departments, NGOs) who are responsible for women in development projects.

"Women in Development", WID
The WID approach promotes women's integration in development efforts (WID-specific and/or WID-integrated projects). The focus is mainly on women.

Women's Productive Roles
A distinction is usually made between productive or economic activities, and reproductive (or human resources maintenance) activities. Productive activities include all tasks which contribute to the income and economic advancement of the household and community, e.g. crop and livestock production, handicrafts production, marketing and wage employment.

Women's Reproductive Roles
A distinction is usually made between productive or economic activities and reproductive (or human resources maintenance) activities. Reproductive (human resources maintenance) activities are those carried out to reproduce and care for the household and community, including fuel and water collection, food preparation, child care, education, health care and home maintenance. These activities, which are often viewed as non-economic, generally carry no monetary compensation and are usually excluded from the national income accounts.

Women-Specific Projects
Projects which are explicitly directed towards women as the main target group (as agents and beneficiaries). Women-only projects can help to raise consciousness and to deliver information and training. They can also be useful for testing specific actions, such as the acceptability of improved technology for women's domestic or productive tasks. They should not lead to less attention to the role of women in more general mainstream projects.

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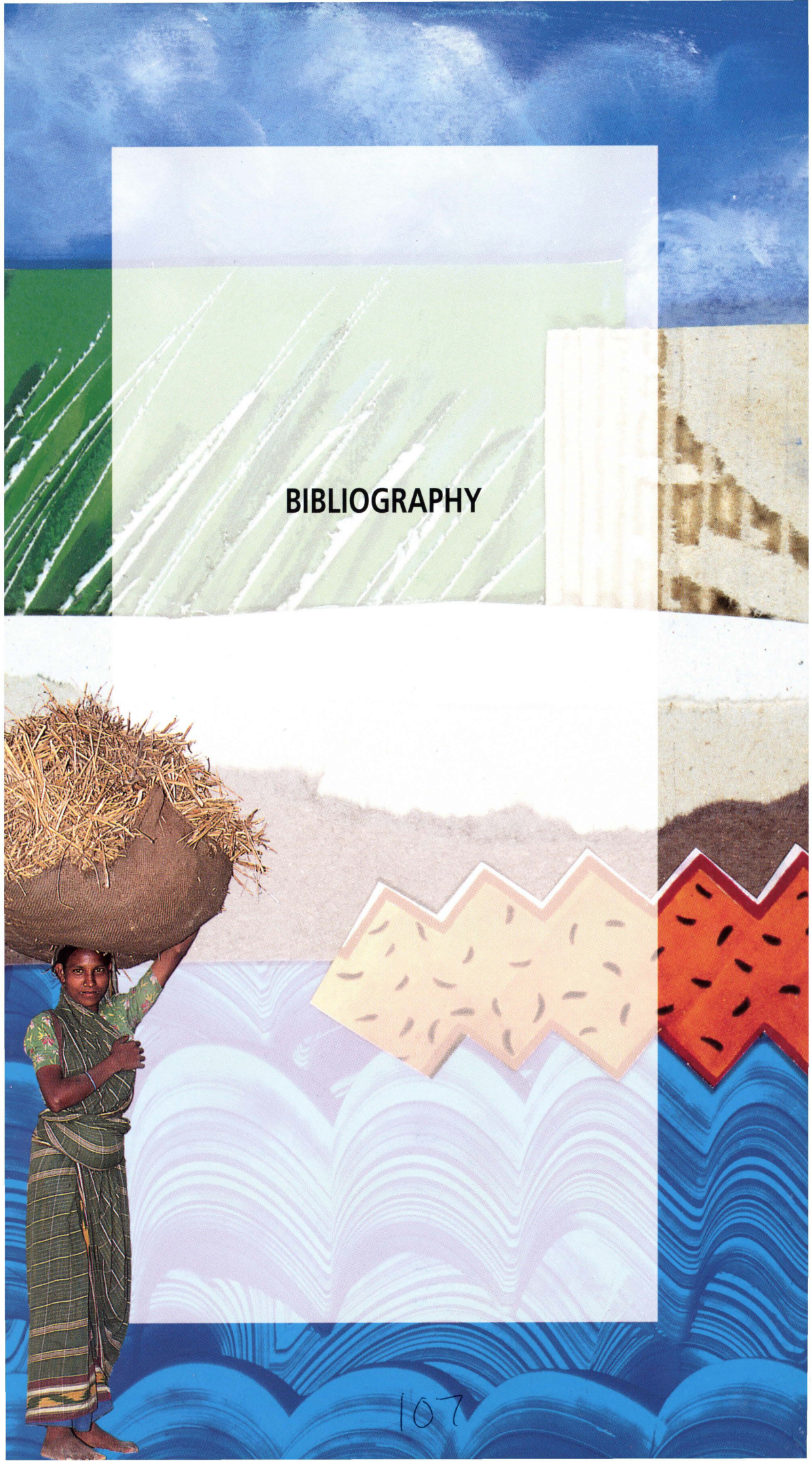

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