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GENDER ISSUES AND THE PROGRAM PERFORMANCE ASSESSMENT SYSTEM

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I. INTRODUCTION

The purpose of the trip was to help the Mission develop a Monitoring and Evaluation (M&E) Plan as part of the Program Performance Assessment System (PPAS) and also to help the Mission address people-level and gender impact, particularly in the context of poverty alleviation. I served as the gender resource person on the three-person TDY team, facilitator for the health and population strategic objective workgroup, and co-facilitator for the social issues (poverty and gender) workgroup. In addition, I participated in the meetings for the other two strategic objectives (all team members participated in all or most of the meetings; each of us took the lead for one of the three strategic objectives).

The Scope of Work for the TDY is attached as Annex A. The assignment of Mission staff to the various workgroups and schedule of meetings is detailed in Annex B.

II. ACTIVITIES

a. Prepared information packets on gender and data collection and analysis issues for the TDY team, similar to the handouts for Mission staff included in Annex D, with the short version of the GIF added. This packet included an analysis of potential gender issues for each strategic objective (Annex C).

b. Developed and presented a two-hour segment on gender issues for the initial half-day workshop for all Mission staff. The segment on gender included attention to people-level impact and poverty and gender linkages, definitions of key concepts and their relation to program performance. Small-group exercises gave participants an opportunity to practice identifying and addressing gender issues for a section of their last Action Plan, and to develop an M&E plan for a gender-relevant indicator. The workshop content and handouts are attached as Annex D. The analysis of potential gender issues for Jamaica (Annex C) was also distributed to Mission staff at the close of the introductory workshop, for consideration during the strategic objective workgroup sessions.

c. Served as lead facilitator and resource person for the health/population workgroup (Strategic Objective III). Identified and discussed issues with regard to program coherence and logic and assisted the group in refining and/or developing revised outputs and indicators and means for measuring achievement. Developed tables and text documenting the changes made and setting forth the M&E plan, in collaboration with the workgroup.

d. Co-facilitated the workgroup on poverty and gender (social issues). Reviewed with the groups the linkages between gender and poverty relevant to the Jamaican context, including the very high level of women-headed households, female labor force participation and high differential in male and female unemployment rates, resulting in a problem for poor women of a very high degree of responsibility for family welfare, but lack of adequate access to resources and voice in decision-making; and the problem inherent in the male educational drop-out rate, which has serious implications for achieving adequate family income levels, has fueled high levels of frustration and violence among young unemployed men, and has led to indications in some quarters of backlash against women's educational and economic progress. The group also identified some key measures for reporting poverty impact, to be sex-disaggregated as appropriate. The second meeting was devoted to reviewing program outputs and indicators for all three strategic objectives and identifying how gender and poverty issues could be better integrated. These suggestions were transmitted to each of the strategic objective workgroups for consideration.

e. Participated in the workgroup meetings for the other two strategic objectives and collaborated in improving outputs and indicators.

f. Met with the Mission's WID Officer to discuss issues and strategy on gender integration. Also participated in general meetings with the Office of Program and Project Development (OPPD) and the Mission Director, as well as the final debriefing meeting.

g. Through Audrey Tomlin, Education Office, USAID/Jamaica, met with Carmen Griffiths of the CRAC to get an update on the Women's Construction Collective (WCC), which had received some USAID support in the past. The WCC, which began training women in construction trades in 1983, became an independent organization in 1986; it now has about 100 - 150 active members. To date, from 300 to 500 women have been trained in plumbing, carpentry, masonry and electrical work. Recently women have also been trained to build biogas digesters. The WCC is a model and has provided technical assistance for a similar cooperative in Monserrat. When the original director left in 1989, a member of the WCC became the coordinator and administrator for the group. This period marked a crisis for the WCC and some of the original members left the group, but it has held together and has since expanded to rural areas. Since 1990, about 90 women have been trained or are currently in training. The major problem facing the WCC is financial sustainability. The group has begun charging a membership fee and still has some donor support (Netherlands); it is investigating the possibility of starting a

workshop in which members could produce furniture and other articles on a self-employment basis, with a share going to the WCC to enhance sustainability.

III. CRITICAL ASSESSMENT

The objectives in the Scope of Work (SOW) were achieved. Changes in the SOW were agreed to by the Mission, e.g. the Mission will develop revised Mission Orders on M&E without direct team involvement; and the automated information system referred to is pending Agency adoption of such a system, so nothing was done specifically for Jamaica. Mission staff expressed satisfaction that the process of reworking outputs and indicators and developing an M&E plan had been useful in refining strategies in the three priority areas. Staff members clearly gained a much better understanding of the utility of establishing coherently linked objectives, outputs and indicators, and the methodology for doing so.

The response to the gender segment of the initial workshop was generally positive; people said that it clarified the issues for them and they gained a better understanding of the relevance of gender to program objectives. They liked the use of examples specific to Jamaica in the presentation and using an example from their own Action Plan for the exercise. As for the logistics of the workshop, if I were to repeat it I would allow a little more time for the first exercise and simplify the example used, e.g. instead of providing the whole section of text on the strategic objective, give them only the most relevant pages; people said it took too long to read (on the other hand, people wondered why some sections of the table--which weren't relevant--were left out). I would explain up front what is included and why. One participant suggested that it would be useful to get the example to be used in the exercise to read in advance.

More broadly, substantive progress was made in incorporating people/gender impact into the Mission strategy, by the social issues group and the three strategic objectives workgroups (all of which will continue in existence to coordinate performance monitoring with OPPD). Jamaica has quite good sex-disaggregated statistical data; however, Mission staff stated that data which can ascribe impact directly to USAID interventions have been generally lacking. Although it was reported that there had been some reluctance by project officers to incorporate such measures in the past, the staff involved in the meetings recognized that it would be impossible to measure such impact at the program level without good project data. Considerable attention was given by all the members of the TDY team to the need to include people/gender impact data in project evaluations, as well as to improve baseline data and attention to people/gender impact expected (including EOPS--End of Project Status statements) in project papers. The likelihood of increased attention to poverty, gender and people-level impact is enhanced by the support expressed by key OPPD staff (which include the WID Officer) and the Mission Director and Deputy Director.

IV. NEXT STEPS

The WID Officer has requested my assistance in developing a set of key questions on people/gender impact for sectors relevant to the Mission's portfolio and priorities, as a guide to help project officers better integrate people/gender issues into project design and evaluation. I also briefed him on assistance available through R&D/WID and GENESYS, if the Mission decides that further training and/or technical assistance is needed.

GENDER WORKSHOP

PPAS Monitoring and Evaluation TDY
Kingston, Jamaica, January 19, 1993

Presented by Patricia A. Martin
LAC Bureau Gender/WID Advisor

I. Overview (30 minutes)

- In trying to achieve people-level impact and reduction in poverty, gender is a major factor.

  - About 45% of Jamaican households are headed by women overall, and women-headed households are among the poorest; further, women are 45% of the labor force, but suffer an unemployment rate over twice that for men (22.5% vs. 9.1%). This implies that there are significant differences in family income due to gender, and that there are gender-related barriers to increasing the economic well-being of a significant number of poor families that we need to take into account. These affect the next generation as well, reducing access to education and upward mobility and aggravating crime and drug problems.

- First, let's examine our terms more closely so we can all share a common context:

  - Impact: What does this mean? Getting beyond inputs and outputs to the development effect achieved. If poverty reduction is a goal, we're looking at impact on people--whether interventions have improved well-being or standard of living: not just training, but employment; not just employment, but income; not just income, but better health, nutrition, education, more stable and secure individuals and families, and hence more equitable and stable socioeconomic conditions. Impact can be measured at different levels, but is also the ultimate measure of project and program success.

    Such ultimate people-level impact may be beyond "manageable interest", but the "so what" questions that help define impact (if you do something, so what? what happens?) need to be asked so that activities at all levels contribute to positive people-level impact. The handout on the Sustainable Development Continuum illustrates how different levels of inputs and activities are linked to achieve people-level impact.

- Gender: In determining impact on people, we need to know who benefits or suffers, since it is clear that not everyone always benefits equally. Different income, age and ethnic groups may be affected differently, as may urban and rural residents. Within all these groups, however, gender may also determine the degree of participation and benefit.

> **Example** - Structural adjustment programs have different effects on men and women. Cuts in public services weigh heavily on women, who are often forced to take up the slack through increased time spent obtaining scarcer services or through substitution of their own unpaid labor for lacking services. Women may be pushed into the labor force to provide family income just when support services such as child care are cut back. Cuts in government employment, which is less discriminatory against women than the private sector, often affect women more, since they predominate at the lower and middle level where most cuts are made. On the other hand, creation of new, non-traditional or non-gender-stereotyped productive activities can create new opportunities for both women and men.

The terms "sex", "gender" and "WID" are often confused. **Sex** refers to fixed biological characteristics, that is, "male" and "female". Data is sex-disaggregated to reveal whether men or women participate and benefit. **Gender** explains why. It refers to the socially determined roles, activities, constraints and relative positions of men and women in societies, that is, "masculine" and "feminine". Gender looks at the way men and women participate and benefit in development activities because of these gender roles and differences. Therefore, it is not just about women, but about comparisons between men and women. **WID** came about because women as a group had been overlooked and marginalized in economic development programs, even suffering unintended negative effects because their roles, interests and constraints were not understood or considered.

AID's focus has now shifted from WID to gender, although it is still necessary to pay extra attention to women to overcome their disadvantage relative to men. Gender neutral approaches are problematic because they assume equal access which may not exist, and don't take into account the constraints which gender differences often impose. It is necessary to understand the effects of gender differences and work to eliminate the constraints they impose.

Example - Women have failed to benefit equally in credit programs when procedures, locations and hours are inconvenient for them. Also, training programs which maintain traditional sex-stereotyped occupational segregation contribute to increasing the concentration of women in low-paying, overcrowded fields, and thus reduce the economic payoff of training for women. For women especially, training programs should consider the potential economic payoff--employment and income--as much or more than the number trained. Some training programs may also discourage female participation by requiring long periods away from home.

WID as now practiced in AID does not leave men out, it brings women in. It emphasizes sharing of resources and responsibilities, not confrontation and competition. The goal is to increase the size of the pie by bringing in all of a society's productive human resources and enhancing their ability to participate in and benefit from socioeconomic development.

- What does this mean for program performance?

- Consideration of gender is essential to achieving people-level impact, especially in reducing poverty. As we saw at the beginning, women are disproportionately poor, precisely because of the disadvantages gender roles have imposed on them. A WID focus can also serve as an excellent proxy for people-level impact. If the most disadvantaged, women, are effectively included, that is a clear indication of impact on the poor.

- Consideration of gender is essential to the success of any program that intends to contribute to socioeconomic progress; even if the immediate activities are not "people-level", the ultimate effects on various social groups need to be considered. It is important to remember that development programs not only benefit women and men, but that the participation of these women and men benefits development, i.e. achievement of program objectives.

Example - Gender effects are especially relevant to the success of non-traditional exports and microenterprise, which should be seen in a growth rather than subsistence context. It is necessary to break the "subsistence barrier" for women as well as men, through promoting economic linkages and growth, and thus bringing women's heavy burden of family responsibilities and limited access to resources into greater equilibrium.

- Attention to gender does not mean adding an extra data collection burden; it means focusing on the data really needed to illuminate impact--

not necessarily more, but better information. It is necessary to identify who really needs to participate and benefit in order to ensure achievement of program objectives, and how this can be achieved by taking into account gender and other relevant variables. It is not necessary to disaggregate all data by sex; it is necessary to do so when gender differentiated effects are likely to be relevant to achievement of objectives, e.g. employment figures, given the marked difference between male and female unemployment rates in Jamaica.

- Sex-disaggregated data indicate where such gender differences occur and measure progress in overcoming barriers to participation and benefit; to explain why these things occur, analysis of gender impact is needed. For example, demonstration of impact for training programs requires more than just input data such as number of women and men trained. Linkage of training with employment, promotion and/or income is needed to reveal differences in impact due to gender. This can either be done through direct statistics, sample studies and evaluations, or, as a gross measure, by comparing training sectors with employment rates and average wage levels, by sex.

- The need for sex-disaggregated data and gender analysis should be taken into account at all levels--project design, project impact evaluations, SAR reports, Action Plans, PODs--so that impact can be demonstrated. This will facilitate effective design and implementation, and also make more efficient use of time and resources, by simplifying reporting and eliminating the need for most of the current ad-hoc requests for information on people-level and gender impact.

II. Exercises (90 minutes)

- Exercise I

In small groups, analyze a strategic objective set (handout) for gender issues; identify appropriate changes in objective and program output statements (if any) and performance and output indicators.

Report out on changes recommended.

- Exercise II

  Either in small groups or plenary, develop a monitoring and evaluation plan to obtain needed data and monitor performance for at least one gender-relevant indicator.

- Discussion of issues which arose during the exercises and feedback.

GLOSSARY OF ACRONYMS

AID . . . . . Agency for International Development

EOPS . . . . . End of Project Status

GENESYS . . . . . Gender in Economic and Social Systems

GIF . . . . . Gender Information Framework

LAC . . . . . Latin America and the Caribbean

M&E . . . . . Monitoring and Evaluation

OPPD . . . . . Office of Program and Project Development

POD . . . . . Program Objectives Document

PPAS . . . . . Program Performance Assessment System

SAR . . . . . Semi Annual Report

SOW . . . . . Scope of Work

TDY . . . . . Temporary Duty

USAID . . . . . United States Agency for International Development

WID . . . . . Women in Development

ANNEX A

SCOPE OF WORK

PROGRAM PERFORMANCE ASSESSMENT SYSTEM

BACKGROUND:

USAID/Jamaica is in the process of finalizing the Mission's Program Performance Assessment System which will provide the framework and methodology for determining the impact of USAID assistance on the three strategic objectives identified by the Mission and approved by AID/W during the Program Objectives Document and Action Plan review in May 1992.

Over the past year, the Mission has worked closely with the LAC Bureau in developing performance indicators that accurately reflect the result of USAID's program and projects. Two Bureau-financed teams visited the Mission in May and September 1991 and a draft PPAS was presented for Mission review. The Mission used this draft, and conducted several working sessions with staff, to identify specific indicators and data sources for inclusion in the POD/AP. The AID/W review of this document recommended that in the interest of greater simplicity and strategic focus, the Mission should move toward decreasing the number and refinement of its indicators, and reflect this refinement in the FY 94/95 Action Plan.

Additionally, the AID/W review recommended that the Mission, with Bureau assistance, attempt to measure the people-level impact of broadly-based sustainable growth, to ensure that there is not over concentration of wealth from growth. Finally, the Mission agreed to develop the capability to measure the impact of female employment at the program level.

SCOPE OF WORK:

The purpose of this TDY is to develop a cost effective system to monitor, analyze and report performance toward achievement of program outputs and strategic objectives -- a Program Performance and Assessment System. This activity will entail refinement of the performance indicators provided in the Mission's approved 1993-97 Program Objectives Document and 1993/94 Action Plan, identification of poverty indicators, and identification of indicators to ensure that gender is adequately addressed in the Mission's PPAS.

Prior to arrival to Jamaica, the team should review the following documents available in AID/W: USAID/Jamaica's 1993-97 Program Objectives Document, 1993/94 Action Plan and Semi-Annual Report ending March 1992. The team should also review the project papers for the Mission's active projects as indicated in the Action Plan. The team should be familiar with the types of indicators and the means used for collecting data by other Missions with projects similar to Jamaica's. The team should also be familiar with LAC

Bureau guidance on development and selection of indicators.

Based on the above, and additional guidance to be provided by the Office of Program and Project Development during the first day of the visit, the PPAS team should prepare a methodology and work plan to be presented to the Mission during the second day of the exercise for the achievement of the following outputs during the two week exercise.

1. Review current indicators (Action Plan) and assist in helping the Mission to refine indicators for which data collection, monitoring and a report plan will be developed.

2. Assist the Mission in developing work teams for each strategic objective as a management approach to achieving the program strategic objectives.

3. Assist the Mission in developing and implementing a Monitoring and Evaluation (M&E) plan for each strategic objective. This includes: identification of key manager's questions, strategic objective and indicator refinement including gender differentiation where appropriate and poverty indicators, information user identification and information use; methodologies and approaches for M&E; feedback procedures; schedule of M&E activities; budgeting M&E; and tracking performance.

4. Assist the Mission in developing a summarized M&E plan for the annual Action Plan.

5. Assist the Mission in developing Mission Orders on M&E.

6. Assist the Mission in developing information systems for organizing, tracking, analyzing, and reporting information. This might include systems/databases to organize and track program performance information at all levels; systems to support analysis of data necessary for Mission decision-making; systems to access and report on program performance to AID/W and other audiences; and systems to automate project-level monitoring activities and link them to program strategies.

In carrying out the above tasks, the PPAS team with the assistance of the Office of Program and Project Development will involve all the relevant technical offices in discussion groups and tasks required to achieve the purpose of finalizing the PPAS. Mission senior management will be available to provide guidance and participate as necessary in the development of the PPAS.

By the end of the visit, the Mission expects to have a fully developed PPAS that is ready for implementation.

TIMING:

The assistance should be provided over a 15 day period starting on October 25, 1992. Two travel days are included in the 15 days.

REPORTS:

Two weeks after completion of the work in Jamaica, the PPAS team will provide USAID/Jamaica a draft PPAS report (5 copies), this report should provide details on all of the accomplishments resulting from the visit as well as a draft M&E plan and any recommendations to operationalize the M&E plan.

fax 202-647-8098

ANNEX B

Erhardt: FYI - this memo will be distributed today to office directors & other staff

Kirk

MEMORANDUM

TO: (see distribution)

FROM: Kirk Dahlgren, OPPD

THRU: John Tennant, OPPD

DATE: January 6, 1992

SUBJECT: **Program Performance Assessment System Workshop -- Jan. 19 - 29, 1993**

Last May, the Mission's three strategic objectives were approved by AID/W during the Program Objectives Document and Action Plan review. The strategic objectives are:

(1) increased foreign exchange earnings and employment;

(2) improved environmental management and protection; and

(3) healthy, smaller families.

USAID/Jamaica's impact on these objectives is meant to be quantified though performance indicators. In turn, specific program outputs are measured by program output indicators and targets. Structurally and numerically, the system looks like this:

	strategic objective			data sources
	1	2	3	--
performance indicators	5	5	5	16
program outputs	8	4	6	--
output indicators/targets	32	11	19	35+

In the POD/Action Plan, baseline data and 1992/1993 targets were proposed for the performance and output indicators. The AID/W review suggested, however, that in the interest of simplicity and strategic focus, the Mission should move toward decreasing the number of its indicators, refining them to assure they are measurable, and that these changes be reflected in our FY 1994/95 Action Plan.

The review also noted two reporting gaps. The first is an effective way of measuring distribution of benefit to ensure there is not an over-concentration of wealth from growth. The second is the capability of measuring the impact of female employment at the program level.

In early October the Mission requested LAC assistance to carry out a workshop aimed at refining the PPAS and introducing poverty alleviation and gender impact measures. That workshop is now scheduled for January 19-29, and a TDY team from LAC will be assisting. The team members are:

Erhardt Rupprecht (team leader) -- LAC/DPP

Dan Seyler -- MSI (trade and investment)

Patricia Martin -- LAC/DPP (social issues)

We intend to develop monitoring and evaluation plans for each strategic objective, specifying indicators, data sources and collection/analysis responsibilities, with an overall goal of reducing the number of indicators that are to be reported to LAC/W. Given the number of LAC field Missions and wide gamut of projects, the Bureau is only interested in a small number of program performance measures for its own purposes. (Of course, we will need to monitor impacts in a more detailed fashion.) The team will bring along examples from a system in place at USAID/Bolivia, and will discuss the possibility of a project-level Oracle data management software system being field tested at USAID/Jamaica.

The following is a tentative schedule:

Tuesday, January 19	800-900 hrs.	Initial TDY team meeting with OPPD Tennant, Brown and Dahlgren
	930-1030 hrs.	Initial TDY team meeting with DIR, DDIR and OPPD staff
	1300-1630	Initial PPAS workshop briefing (all participants); discuss objectives; break-out to small groups (strategic objectives, poverty and gender)
Wednesday, Jan. 20	900-1030	SO#1 first meeting
	1030-1200	SO#2 first meeting
	1400-1530	SO#3 first meeting
Thursday, Jan. 21	1000-1200	social issues group
Friday, Jan. 22	900-1030	SO#1 second meeting
	1030-1200	SO#2 second meeting
	1400-1530	SO#3 second meeting

Monday, Jan. 25	1000-1200	social issues group
Tuesday, Jan. 26	930-1100 1100-1230 1430-1600	SO#1 third meeting SO#2 third meeting SO#3 third meeting
Wednesday, Jan. 27	900-1000	meeting of team, group chairs and reporters
Friday, Jan. 29	930-1130	team and group briefings of front office

The following committees have been designated for each strategic objective:

Strategic objective #1

Craddock (chair)
Mignott
Mohan
Smith
Banks
Kaiser
Owens
Kopstein
Hall

Strategic objective #2

C. Brown (chair)
Reeve
Nolan
Hasan
Perez
Gelman
Figueroa
(possible OPE designate)

Strategic objective #3

B. Brown (chair)
Wood
O'Connor
G. Williams
Grey
McKay
Davis-Ivey
Ornstein
Stewart

Social issues (gender and poverty alleviation)

Dahlgren (chair)
Mohan
C. Hunter
Davis-Ivey
Henry
Pitter-Patterson
Marshall
Tomlin

Chairperson's responsibilities are as follows:

- to ensure that the group meets the objectives and delivers the products as agreed in the first briefing meeting;

- to consult with the TDY team to resolve issues or answer questions;

- to appoint a reporter who will record decisions and orally report on the group's work to the final front office briefing (these duties can be done by two different group members if so desired).

Poster paper, an easel and marking pens will be provided to each group, and meetings will be held in the 4th floor conference room.

Distribution: DIR
DDIR
OPPD
CONT
ARDO
OPE
RHUDO
HPN
EHR
EEE
ECON
RLA (info)

clearance: OPE:WCraddock (draft)
ARDO:MSmith (draft)
RHUDO:WGelman (draft)
HPN:BBrown (draft)
EHR:JWood (draft)

ANNEX C

POTENTIAL GENDER ISSUES
JAMAICA

S.O. 1 - Increased Foreign Exchange Earnings and Employment

The POD indicates that this S.O. is particularly relevant to improving opportunities for women, who suffer an unemployment rate over twice that for men (22.5% vs. 9.1%). USAID assistance is targetted to many industries where women are the majority of employees, such as garment manufacture and information processing. Key implementation strategies include increasing productivity and improved human resource development, as well as supporting microenterprise development; gender is highly relevant to all these strategies.

However, the current performance indicator on employment is not sex-disaggregated, which impedes measuring impact on women's employment. In addition, employment increases in the various priority export industries could be separately sex-disaggregated (for internal mission use, not as part of the performance indicator) to track relative performance and gender impact of these industries. Similarly, male and female wage rates for different types of export industries could be correlated with employment figures to help assess the relative impact of export-oriented economic activities.

The mission may want to consider a special study on sex-disaggregated productivity in key export sectors in order to assess the relative impact of male and female employment on productivity gains.

There appears to be considerable female participation in agricultural activities in Jamaica; however, women appear to be better represented in USAID-supported agricultural training than in agricultural employment or among farmers involved in projects. Care should be taken to disaggregate beneficiary figures and determine whether women are being reached in proportion to their representation among farmers, and if not, determine the reasons and make changes as necessary.

Disaggregating increases in small and microenterprise firms by sex of the proprietor, sector and if possible, number and sex of employees, could also be useful in assessing relative growth and gender impact. This could be done through a survey or special study to augment registry information.

Similarly, disaggregating training figures by sex and by sector (for managerial as well as skills training) and tracking subsequent employment by sector and sex would help the mission to correlate training, employment and productivity data and better assess gender impact.

S.O. 2 - Improved Environmental Management and Protection

Given the relatively high female participation in agriculture, it is important that women as well as men be effectively involved in environmentally sound cultivation practices; therefore, the number of farmers involved should be sex-disaggregated to indicate whether women as well as men are adopting such practices (Program Output 3).

Another potential gender issue is whether environmental management NGOs have the capability to reach all segments of the public effectively with environmental education programs and community participation efforts, e.g. whether they are aware of different gender-related interests and activities with regard to resource use and can develop appropriate responses. While this is not appropriate for an indicator, it should be taken into account as a factor which can affect program success.

S.O. 3 - Healthy, Smaller Families

While the POD/AP text clearly recognizes the need to include women in drug abuse and AIDS/STD interventions, performance and output indicators do not disaggregate by sex such key items as understanding of HIV transmittal; HIV, syphilis and other STD incidence; and drug use. Gender roles and relationships are also key to increasing condom use, i.e. the degree of knowledge, access, and influence/decision power which women and men are able and willing to exercise.

Other Concerns

Education/Training - An issue relevant to several strategic objectives and overall program impact is the way in which training impact is assessed. Mission SARs commendably disaggregate numbers trained by gender for all training components and projects. It may be even more useful, however, to disaggregate training, eg. under CLASP II, by sector and sex, to determine gender distribution across sectors and assess relative employment/income potential for women and men.

Another issue is specific to the Primary Education Assistance Project (PEAP II). It would be useful to disaggregate math achievement (math exams for both teachers and students) by sex to identify any gender differences and necessary changes.

Urban Development/Shelter - Community development activities, such as those under the Inner Kingston Development Project, could report impact by gender and other relevant factors such as age and income/class status, to make clear who benefits and how, and thus better assess project and program success.

Similarly, shelter programs could look at not only the number of loans by gender, but also the type and size of loans to better assess gender and family impact.

ANNEX D

GENDER WORKSHOP

PPAS Monitoring and Evaluation TDY
Kingston, Jamaica, January 19, 1993

Presented by Patricia A. Martin
LAC Bureau Gender/WID Advisor

I. Overview (30 minutes)

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    Such ultimate people-level impact may be beyond "manageable interest", but the "so what" questions that help define impact (if you do something, so what? what happens?) need to be asked so that activities at all levels contribute to positive people-level impact. The handout on the Sustainable Development Continuum illustrates how different levels of inputs and activities are linked to achieve people-level impact.

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and ethnic groups may be affected differently, as may urban and rural residents. Within all these groups, however, gender may also determine the degree of participation and benefit.

> **Example** - Structural adjustment programs have different effects on men and women. Cuts in public services weigh heavily on women, who are often forced to take up the slack through increased time spent obtaining scarcer services or through substitution of their own unpaid labor for lacking services. Women may be pushed into the labor force to provide family income just when support services such as child care are cut back. Cuts in government employment, which is less discriminatory against women than the private sector, often affect women more, since they predominate at the lower and middle level where most cuts are made. On the other hand, creation of new, non-traditional or non-gender-stereotyped productive activities can create new opportunities for both women and men.

The terms "sex", "gender" and "WID" are often confused. **Sex** refers to fixed biological characteristics, that is, "male" and "female". Data is sex-disaggregated to reveal whether men or women participate and benefit. **Gender** explains why. It refers to the socially determined roles, activities, constraints and relative positions of men and women in societies, that is, "masculine" and "feminine". Gender looks at the way men and women participate and benefit in development activities because of these gender roles and differences. Therefore, it is not just about women, but about comparisons between men and women. **WID** came about because women as a group had been overlooked and marginalized in economic development programs, even suffering unintended negative effects because their roles, interests and constraints were not understood or considered.

AID's focus has now shifted from WID to gender, although it is still necessary to pay extra attention to women to overcome their disadvantage relative to men. Gender neutral approaches are problematic because they assume equal access which may not exist, and don't take into account the constraints which gender differences often impose. It is necessary to understand the effects of gender differences and work to eliminate the constraints they impose.

> **Example** - Women have failed to benefit equally in credit programs when procedures, locations and hours are inconvenient for them. Also, training programs which maintain traditional sex-stereotyped occupational segregation contribute to increasing

the concentration of women in low-paying, overcrowded fields, and thus reduce the economic payoff of training for women. For women especially, training programs should consider the potential economic payoff--employment and income--as much or more than the number trained. Some training programs may also discourage female participation by requiring long periods away from home.

WID as now practiced in AID does not leave men out, it brings women in. It emphasizes sharing of resources and responsibilities, not confrontation and competition. The goal is to increase the size of the pie by bringing in all of a society's productive human resources and enhancing their ability to participate in and benefit from socioeconomic development.

- What does this mean for program performance?

  - Consideration of gender is essential to achieving people-level impact, especially in reducing poverty. As we saw at the beginning, women are disproportionately poor, precisely because of the disadvantages gender roles have imposed on them. A WID focus can also serve as an excellent proxy for people-level impact. If the most disadvantaged, women, are effectively included, that is a clear indication of impact on the poor.

  - Consideration of gender is essential to the success of any program that intends to contribute to socioeconomic progress; even if the immediate activities are not "people-level", the ultimate effects on various social groups need to be considered. It is important to remember that development programs not only benefit women and men, but that the participation of these women and men benefits development, i.e. achievement of program objectives.

    Example - Gender effects are especially relevant to the success of non-traditional exports and microenterprise, which should be seen in a growth rather than subsistence context. It is necessary to break the "subsistence barrier" for women as well as men, through promoting economic linkages and growth, and thus bringing women's heavy burden of family responsibilities and limited access to resources into greater equilibrium.

  - Attention to gender does not mean adding an extra data collection burden; it means focusing on the data really needed to illuminate impact--not necessarily <u>more</u>, but <u>better</u> information. It is necessary to identify <u>who</u> really needs to participate and benefit in order to

ensure achievement of program objectives, and how this can be achieved by taking into account gender and other relevant variables. It is not necessary to disaggregate all data by sex; it is necessary to do so when gender differentiated effects are likely to be relevant to achievement of objectives, e.g. employment figures, given the marked difference between male and female unemployment rates in Jamaica.

- Sex-disaggregated data indicate where such gender differences occur and measure progress in overcoming barriers to participation and benefit; to explain why these things occur, analysis of gender impact is needed. For example, demonstration of impact for training programs requires more than just input data such as number of women and men trained. Linkage of training with employment, promotion and/or income is needed to reveal differences in impact due to gender. This can either be done through direct statistics, sample studies and evaluations, or, as a gross measure, by comparing training sectors with employment rates and average wage levels, by sex.

- The need for sex-disaggregated data and gender analysis should be taken into account at all levels--project design, project impact evaluations, SAR reports, Action Plans, PODs--so that impact can be demonstrated. This will facilitate effective design and implementation, and also make more efficient use of time and resources, by simplifying reporting and eliminating the need for most of the current ad-hoc requests for information on people-level and gender impact.

II. Exercises (90 minutes)

- Exercise I

  In small groups, analyze a strategic objective set (handout) for gender issues; identify appropriate changes in objective and program output statements (if any) and performance and output indicators.

  Report out on changes recommended.

- Exercise II

  Either in small groups or plenary, develop a monitoring and evaluation plan to obtain needed data and monitor performance for at least one gender-relevant indicator.

- Discussion of issues which arose during the exercises and feedback.

INSTRUCTIONS FOR EXERCISES

- Divide into small groups; select a rapporteur.

Exercise I

Using the section from your last POD/Action Plan as an example, analyze it for attention to gender issues. Use the guidelines and other materials in your handouts to determine whether and why gender is relevant to achievement of the strategic objective and how gender should be addressed and gender effects measured if they are relevant. You may suggest changes at the strategic objective and program output levels and in performance and output indicators. Draft recommended changes to present to the workshop.

You have 20 minutes to complete the exercise and 5 minutes to report to the whole group.

Exercise II

Using the example as you revised it in the last exercise, develop a monitoring and evaluation plan to obtain the data and monitor performance for at least one indicator for which gender is relevant.

The plan should include the following:

Unit of measurement
Type of data and source, e.g. household survey, statistical reports, project reports, special study, etc.
Frequency of data collection
Office or person responsible for collecting data
Key assumptions

You have 20 minutes to complete the exercise.

At the end of this exercise, we will discuss issues which came up in the course of these exercises (30 min.)

EXAMPLE USED IN EXERCISE

LAC Bureau Objective: Support Achievement of Broadly-Based, Sustainable economic growth

LAC Bureau Sub-objective: Encourage Economic Policies that Promote Investment, Productive Employment and Outward-Oriented Diversification; Encourage A Vigorous Private Sector Response; and Increased Participation by the Disadvantaged

B. *MISSION STRATEGIC OBJECTIVE: INCREASED FOREIGN EXCHANGE EARNINGS AND EMPLOYMENT*

I. Strategic Objective Selection and Rationale

USAID/Jamaica has identified *Increased Foreign Exchange Earnings and Employment* as its top priority strategic objective. Jamaica's efforts to liberalize its economy and open its markets are laying the foundation for strong and vibrant growth. Sustained effort on the structural reform process is needed to complete the process which is clearly on the right track. But Jamaica's heavy debt burden, coupled with its import dependence require it to exert special efforts on earning foreign exchange through an export and investment orientation. Broad participation of all segments of the society in a trade and investment led growth strategy can be facilitated by emphasizing employment generation as an important element of the strategy. Sustained effort on completing the economic liberalization process supported by programs to remove selected constraints impeding trade and investment, and to help Jamaica seize specific opportunities within areas of comparative advantage, provide a winning formula for meeting this strategic objective.

Our rationale for selecting this strategic objective as a first priority is based on the critical need for Jamaica to earn foreign exchange and increase employment as described in the overview section, coupled with USAID's excellent experience in the relevant program areas that should allow us to make a significant impact on the underlying problems. We have, for example, played an important role in the economic liberalization process to date with a series of ESF policy support programs and DA funded policy analyses. We, accordingly, have considerable experience and credibility with the Government of Jamaica as honest and objective brokers of the policy reform process in general. We were the first donor to support Jamaica's privatization program and still play the dominant donor support role for this program which has long been regarded as a major success.

Moreover, we have established an important presence in supporting the critical foreign exchange earning tourism sector through our Tourism Action Plan activity, North Coast Development Support Project (for infrastructure), and through several sub-activities under the Export Development and Investment Promotion (EDIP) Project. Other on-going activities, including Inner Kingston, EDIP, Agricultural Export Services, Agricultural Research, Hillside Agriculture, Micro-enterprise Development, and the Caribbean and Latin America Scholarship Program (CLASP II) have contributed to our strong positions in strengthening relevant support institutions and the private sector human resource base. They also have contributed to improving the investment environment, supporting new investments in Kingston and elsewhere, and improving production and productivity in elected export industries and for export agriculture. With this broad and relevant ase on which to build, and the necessary staff composition (more than 50 percent of ur technical staff focus on these areas) and program portfolio to move forward now, SAID is arguably the best positioned donor to progress rapidly and productively toward his objective. Indeed, given the composition of our portfolio and staff, and the

relative needs of Jamaica, we would be hard pressed to focus elsewhere as a first priority and expect to have significant and meaningful impact over the planning period.

Our emphasis will continue to be on working with the GOJ on policy and regulatory reforms, reducing the role of government in the economy, streamlining and strengthening appropriate government support organizations, and helping to improve human resources and infrastructure essential to private trade and investment led growth. USAID will also work with the private sector in areas of comparative advantage to increase productivity while helping to build private sector support institutions, including financial markets, important for private sector growth. Indicators measuring successful achievement of this strategic objective (Table 1A and 1B in Annex) are: (1) a 15 percent increase in foreign exchange earnings in priority non-agricultural areas; (2) a 21 percent increase in foreign exchange earnings of selected agricultural exports; (3) a 28 percent increase in foreign investments in assisted sectors; (4) a 27 percent increase in domestic investments in assisted sectors; and (5) a 26 percent increase in priority export sectors and in employment in Inner Kingston.

This strategic objective is particularly relevant to improving opportunities for women. Although unemployment for men and women declined in 1991, the traditional disparities with respect to women and youth are still evident. Of the total number of unemployed, 68.3 percent are women and 57.8 percent are under 25 years old. The unemployment rate for women (22.5 percent) is well over twice the rate for men (9.1 percent). Employment expansion in key areas that are traditionally dominated by women (i.e. garments, information processing and the like) are likely to result in greater job opportunities, and less unemployment among women. USAID's strategy is targeted at many industries where women are the major employees.

Other Donors: Although other donors are rapidly entering this strategic objective area, USAID was the first to engage in most of the component areas, and is recognized as the leading donor in all but the macro policy and infrastructure arenas. The multilateral funding agencies, in particular, have influenced Jamaica's commitment to reform and supplied performance-based assistance to help meet the country's urgent needs. Jamaica recently restored its Stand-By Arrangement with the IMF, and discussions are to begin shortly on an Extended Funding Facility. Further, the World Bank and Jamaica signed a US$30 million Second Trade and Financial Sector Adjustment loan in March 1991, which is co-financed by a US$75 million Trade, Finance, and Investment Sector loan from the IDB, and US$25 million in credits from the Export-Import Bank of Japan. Jamaica is also discussing a Private Sector Adjustment Loan, and a Social Sector Investment Project with the World Bank. Moreover, Jamaica hopes to benefit from a new IDB-led Multilateral Investment Fund, expected to provide US$1.5 billion over the next five years for the LAC region to support investment and business growth in a liberalized trade and investment environment.

II. Implementation Strategy

As noted above, USAID's implementation strategy under this strategic objective is to focus our limited resources on relieving the most important constraints to improving foreign exchange earnings and employment while targeting selected assistance on growth sectors of special promise. The major constraints to achieving the strategic objective fall into three broad categories: (1) Inadequate policy and regulatory framework; (2) Low productivity; and (3) Inefficient financial markets. The Mission's strategy is to target key elements of these constraints that perpetuate a poor business environment

and inhibit foreign exchange earning growth and employment opportunities. While progress over the last decade has been achieved, it has not been sufficient to overcome a vicious cycle of debt accumulation and rescheduling and dependence on concessional financing.

- Inadequate policy and regulatory framework: While substantial policy reforms have taken place, particularly in the area of foreign exchange liberalization, a cumbersome and inefficient administrative and regulatory apparatus remains in place, inhibiting economic growth. Policy reforms that create a more private sector led economy are critical to the success of USAID's program. Through ESF cash transfers and project assistance, USAID has targeted those areas that have the greatest potential for success and impact on improving the overall investment climate in Jamaica. The policy reform agenda currently includes: (1) support for a continuation of foreign exchange and other liberalization measures leading to an open and free market economy, (2) strengthening the GOJ's fiscal policy planning and implementation capabilities, (3) implementation of privatization and divestiture plans, and other policies fostering competition, broad-based ownership, and a reduced government role in the economy, (4) formation of regulatory bodies such as a security and exchange commission. These activities are critical to providing the necessary framework for a market-oriented economy. Future activities to be included on the policy agenda will focus on alleviating specific administrative constraints, such as cumbersome export documentation and licensing and registration requirements, and low tax compliance. USAID will continue to provide technical assistance, training, policy analyses, and some institutional support to overcome the above constraints to an improved policy and regulatory environment.

- Low Productivity: Major constraints to expanding existing capacity and increasing competitiveness are: (1) business and agricultural inefficiencies; (2) lack of skilled workers and managers; (3) inadequate and unreliable supplies of inputs; (4) poor infrastructure and transportation system; and (5) the absence of full service business organizations that foster both backward and forward linkages. Low productivity is a legacy of early protectionist policies and foreign exchange controls, and is exacerbated by the weak policy and regulatory framework discussed above. USAID's strategy is to reduce production inefficiencies in important industrial and agricultural export sub-sectors (e.g. garments, furniture, information processing, bananas, yams, coffee and cocoa) that have the most potential for growth, train workers and managers to improve business operations and use improved methods for agricultural production, rehabilitate infrastructure in key tourist areas, and strengthen business service organizations.

  Jamaica has made outstanding progress on privatization over the past few years, but the government remains a major owner/operator of real estate and key productive enterprises. These assets include transport enterprises (such as Air Jamaica); the electric power company; a petroleum refinery; farm land; agri-business export processing facilities; factory space; major production facilities in sugar and assets held by the Urban Development Corporation. Government's presence reduces productivity, stifles innovation and growth, draws scarce public resources away from social programs, and constrains private investment. Project assistance, and policy dialogue are key USAID ingredients used to support GOJ efforts to reduce government holdings and divest shares to broad-based ownership.

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- **Inefficient Financial Markets:** The chief constraints in the financial markets category are: (1) perceived high cost of credit; (2) limited term-financing; (3) lack of equity financing; (4) limited availability of small business credit; (5) inefficient stock exchange; and (6) insufficient competition. Poor monetary and fiscal policies have caused high inflation and interest rates. In this environment, commercial banks are forced to be extremely conservative, practically eliminating most sources of small business and expansion financing. The low level of competition and inefficient operations of the capital markets also preclude access to equity financing for most firms. Development finance organizations are present, but their tradition of donor-financed growth severely constrains their market coverage and cost-effectiveness. Policy reforms are underway to improve the market, but their implementation will require considerable efforts by the GOJ and the private sector. USAID's strategy is to demonstrate that term and equity financing and credit to small businesses are prudent and beneficial financial decisions that can positively impact the broader economy. Increasing the availability of long-term capital in the financial market is a USAID commitment.

USAID has selected eight program outputs (Tables 1A and 1B in Annex) to monitor and track activities against the strategic objectives. A brief discussion of each program output and planned key activities follows.

Improving the policy environment for trade and investment is a major program output under this strategic objective. As noted elsewhere, USAID's policy dialogue has two thrusts, better economic policies for sustainable growth and an improved private investment environment. By targeting Economic Support Funds and Development Assistance resources under the Export Development and Investment Promotion (EDIP), USAID will provide technical assistance and fund policy analyses to help strengthen the Ministry of Finance's fiscal capability, encourage adoption of Employee Stock Ownership programs and pro-competition legislation, and continue progress under the GOJ's privatization program. USAID will also support under the ESF policy agenda the macro policy dialogue spearheaded by the IMF and multi-lateral donors, especially measures to maintain and further economic liberalization.

USAID intends to support efforts to develop a viable and responsive stock exchange in Jamaica and will also work to establish a Securities Exchange Commission. We will look for opportunities to develop a secondary market mechanism for debt, as well as support efforts to increase the availability of term credit to borrowers.

Under the improved research developed and technology adopted by export industries output, USAID will concentrate on those industrial and agricultural activities that have the most potential for export earnings. Current high priorities are garments and furniture of the industrial groups, and tourism and information processing in the services sector. Others may emerge during the planning period, and EDIP will maintain the flexibility to adjust priorities according to our reassessment of comparative potential. We are also expanding packing and storage facilities for export crops and developing production enhancing research which will be demonstrated on farms.

Increasing production and productivity of selected export industries and agriculture, two program outputs, is a major focus of our activities. For agricultural export development, USAID will concentrate on increasing production and productivity of Jamaica's most economically viable foreign exchange earning crops, i.e. bananas (over the short to medium term while there are solid markets), yams, coffee, cocoa and other

selected crops with high income generating potential. Two major projects in the sector will contribute: Agricultural Export Services and Hillside Agriculture. Adoption of improved technology and increased production will be the major program output indicators used to measure progress. Both projects will support the adoption of improved technology for farmers involved in export crops. EDIP will continue to focus on increasing productivity in selected areas such as garments, furniture and information processing.

Increasing the number of private investments is an important component of USAID's strategy. EDIP resources will significantly help the GOJ in moving ahead on their privatization program by providing technical assistance and training to key policy personnel. Contributing to this program output is the Microenterprise Development Project which directs technical assistance and loan resources to microenterprise lending organizations to increase their sustainability and ability to assist microenterprises become viable business entities.

Constraints to an improved investment climate in Inner Kingston include lack of suitable manufacturing space priced at acceptable rates. The Inner Kingston Project will continue to support improvement of the investment climate in downtown Kingston through infrastructure improvements of existing structures--thus, providing space for manufacturing, public improvement and community development activities. Progress will be measured by program output indicators focus on the value of private investment and increases in industrial and commercial space rehabilitated in Inner Kingston .

Improved tourism infrastructure and services are a major focus of the strategy. Deteriorating infrastructure which is under considerable pressure from rapid urban growth threatens to undermine the gains made in tourism. Along with the Japanese, USAID will help to rehabilitate and upgrade critical infrastructure improvement activities through the North Coast Development Support Project. The amended Technical Support for Shelter and Urban Services Project will help to improve solid waste management in Montego Bay and address other important constraints to tourism growth in that key tourist center. USAID will support improved environmental management activities under the Development of Environmental Management Organizations Project (discussed under the environment strategic objective). Performance indicators under the improved tourism infrastructure program output include: (1) expanding the Ocho Rios Port berth # 2, which welcomes 80 percent of the tourists arriving by sea to the island; (2) improvements in the North Coast Highway; (3) storm drain improvements in Montego Bay; (4) sewerage collection and treatment facilities in Montego Bay; (5) improvements in potable water facilities in Negril; and (6) improved environmental management in the major tourist areas.

Improved human resources development supporting the private sector is a necessary component of the strategy. Lack of skilled workers and managers is a major constraint to improving productivity in the private sector. Under the regional CLASP II project, up to 30 individuals per year will receive short term skills training and 25 per term will receive academic training in areas relevant to our three strategic objectives, with priority placed on training relevant to strategic objective number one. The University of the West Indies School of Management Project will establish a greater capacity to train mid-level managers by the end of the planning period. Finally, Jamaica will benefit from its inclusion under the LAC Economics Training program that will upgrade the skills of up to 25 masters level economists from the public and private sectors to do better economic analysis and planning.

A new activity that USAID plans to support, in an effort to increase skills training i Jamaica, is through the International Fund for Education and Self-Help (IFESH), a U.S. Non-Governmental Organization (NGO). Under a cooperative agreement with IFESH, A.I.D. grant funds, amplified by a debt-for-development swap, will finance skills development and strengthening of micro-enterprises.

Finally, the Mission's strategy calls for continued support for the PL 480 Section 108 auction system to local commercial banks and implementation of a "Second Tier" auction for development banks and credit unions to address the needs of small scale borrowers. There is currently US$7.5 million available from 1991 resources. These funds will be made available to local commercial and development financial institutions during FY 1992/93 to improve the availability of credit to small and medium size enterprises.

III. Resource Requirements

To achieve progress under this strategic objective, the Mission is planning to use resources averaging US$22 million per year from FY 92 through FY 94. A 20 percent reduction in resources in the DA accounts supporting this strategic objective would result in stretching out the funding of key activities, thus delaying and/or decreasi impact. The mortgage ratio for the PSEE and ARDN accounts are at 3.84 and 3.16 respectively for FY 92, and we would be hard pressed to sustain any cuts in these accounts, due to our more concentrated and focused portfolio which relies heavily on PSEE and Agriculture funds. If forced to sustain a 20 percent cut in the resources f this strategic objective (approximately US$4.4 million per year), ESF would be the or funding source we might reduce without significant damage to our ability to meet this strategic objective. A 20 percent increase in resources would allow the Mission to l down the mortgage on several key projects that support this strategic objective, such as EDIP, Agricultural Export Services, Hillside Agriculture, Technical Services for Shelter and Urban Services and Micro-Enterprise Development. We would also be able accelerate project implementation and target key constraints faster, thus, better assisting the GOJ in implementing key reforms.

	FY 92	FY 93	FY 94
		(US$000)	
ESF	15.0	15.0	15.0
DA	6.4	7.9	6.5
Total	21.4	22.9	21.5
% of DA OYB	39%	48%	40%
% of Total OYB	56%	73%	69%
Non-Additive			
Regional LAC Economist Training	.2	.2	.2
Section 108 Auction	7.5		

JAMAICA

TABLES 1A AND 1B: MONITORING THE ACHIEVEMENT OF STRATEGIC OBJECTIVES AND PROGRAM OUTPUTS

LAC Bureau Objective: — Support achievement of broadly-based, sustainable economic growth

LAC Bureau Sub-objectives: — Encourage economic policies that promote investment, productive employment and outward-oriented diversification

— Encourage a vigorous private sector response

I. MISSION STRATEGIC OBJECTIVE — INCREASED FOREIGN EXCHANGE EARNINGS AND EMPLOYMENT

Performance Indicator	Unit	BASELINE Value	BASELINE date	TARGET Value	TARGET date	Revised	Current Year 1992 Value	Current Year 1992 Date	1993 Target Value	1993 Target Date	DATA SOURCE
15% Increase in foreign exchange earnings in priority non-agricultural areas 1/	US$ (000)	1023	1990	1481	1995		1086		1159		JAMPRO
21% Increase in foreign exchange earnings of selected agricultural exports 2/	US$ (000)	63273	1990	77000	1995		76500		79110		PIOJ Economic and Social Survey and Commodity Industry Boards
28% Increase in value of foreign investments in assisted sectors 3/	US$ Million	50	1990	64	1995		55		58		JAMPRO
27% Increase in value of domestic investments in assisted sectors 4/	US$ Million	460	1990	587	1995		507		532		STATIN and IMF
20% Increase in employment in priority export sectors & Inner Kingston 5/	# of persons	293928	1990	370500	1995		297000		311800		STATIN Report on Small Business and JAMPRO Social/Economic Survey

1/ furniture, garments, information processing, tourism

2/ Banana, cocoa, coffee and yams

3/ The increases in investments resulting from JAMPRO assisted activities average J$430 million per year since 1981, or about US$50 million per year at 1990 exchange rates. It should be noted that these data vary considerably over time, from as low as J$100 million to slightly more than J$800 million depending on the year. This variability must be tak into consideration when setting benchmarks, since some of the causes are external to Jamaica and to the program. Based on continued growth in the economy, an open exchange regime, focus by JAMPRO in high-growth sectors, it seems reasonable to assume an average annual increase in value of foreign investments assisted by JAMPRO at five percent a year.

4/ Additions in private domestic investment vary considerably over the last several years, but have averaged J$3660 million per year, or about US$460 million at 1990 exchange rates. Given the openess of the Jamaican economy, and the influence of external factors, some continued variability should be expected. In addition to variability, there are also significant data collection and compiling problems. USAID is discussing with the World Bank, the Statistical Institute of Jamaica, and others, technical assistance to resolve these issues and to provide a consistent and accurate data base. However, based on continued growth in the economy, an open exchange reg increasingly favorable investment environment, it seems reasonable to assume an average annual increase in the data of five percent per year.

5/ furniture, garments, info processing, small/micro enterprises, tourism, Inner Kingston

I.1 Program Output: Improved Policy Environment for Trade and Investment

Program Output Indicator	Unit	BASELINE Value	BASELINE date	TARGET Value	TARGET date	Revised	Current Year 1992 Value	Current Year 1992 Date	1993 Target Value	1993 Target Date	DATA SOURCE
Strengthened Ministry of Finance fiscal capability	XXXXXX	0	1990	sustained	1995		staff in place		operation		Ministry of Finance
Implementation of Employee Stock Ownership Plan legislation	XXXXXX	0	1990	imple-mented	1995		XXXXXX		legisla passed		Ministry of Finance
Adoption of pro-competition legislation	XXXXXX	0	1990	adopted	1995		XXXXXX		legisla passed		Ministry of Finance
Continued GOJ priority on privatization to decrease state ownership	# of firms	10	1990	20	1995		10		13		National Investment Bank of Jamaica

JAMAICA

TABLES 1A AND 1B: MONITORING THE ACHIEVEMENT OF STRATEGIC OBJECTIVES AND PROGRAM OUTPUTS

LAC Bureau Objective: — Support achievement of broadly-based, sustainable economic growth

LAC Bureau Sub-objectives: — Encourage economic policies that promote investment, productive employment and outward-oriented diversification

— Encourage a vigorous private sector response

I. MISSION STRATEGIC OBJECTIVE — INCREASED FOREIGN EXCHANGE EARNINGS AND EMPLOYMENT

I.4 Program Output: Increase in productivity of selected exports

Program Output Indicator	Unit	BASELINE Value	BASELINE date	TARGET Value	TARGET date	Revised	Current Year 1992 Value	Current Year 1992 Date	1993 Target Value	1993 Target Date	DATA SOURCE
150% increase in coffee productivity	tons per acre	12	1990	30	1995		15		20		Coffee Industry Board
200% increase in cocoa productivity	tons per acre	10	1990	30	1995		15		20		Cocoa Industry Board
100% increase in banana productivity	tons per acre	5	1990	10	1995		7		8		All Island Banana Growers Association
200% increase in yam productivity	tons per acre	5	1990	15	1995		7		9		Ministry of Agriculture
25% increase in productivity of garment workers per year	US$ per worker	14663	1990	18328	1995		16129		16862		STATIN Employment Earnings/Hours Worked in Large Establishments

I.5 Program Output: Increased number of private investments

Program Output Indicator	Unit	BASELINE Value	BASELINE date	TARGET Value	TARGET date	Revised	Current Year 1992 Value	Current Year 1992 Date	1993 Target Value	1993 Target Date	DATA SOURCE
Increased foreign direct investment as a result of privatization 1/	US$ millions	110	1990	300	1995		150		155		National Investment Bank of Jamaica and Company Annual Reports
15% increase in registered small/micro enterprise firms	# of firms	65100	1990	75225	1995		65200		66400		STATIN Report on Census of Small Business
45% increase in registered micro enterprise firms 2/	# of firms	506	1990	725	1995		611		631		Social Survey

1/ Includes telecommunications, power industry, sugar, and infrastructure (water, airport)

2/ furniture, garments, information processing, tourism

JAMAICA
TABLES IA AND IB: MONITORING THE ACHIEVEMENT OF STRATEGIC OBJECTIVES AND PROGRAM OUTPUTS
LAC Bureau Objective: — Support achievement of broadly-based, sustainable economic growth
LAC Bureau Sub-objectives: — Encourage economic policies that promote investment, productive employment and outward-oriented diversification
— Encourage a vigorous private sector response

I. MISSION STRATEGIC OBJECTIVE — INCREASED FOREIGN EXCHANGE EARNINGS AND EMPLOYMENT

I.B Program Output: — Improved Human Resource Development Supporting the Private Sector

Program Output Indicator	Unit	BASELINE Value	BASELINE date	TARGET Value	TARGET date	Revised	Current Year 1992 Value	Current Year 1992 Date	1993 Target Value	1993 Target Date	DATA SOURCE
Greater capacity by UWI to train mid-level managers working in private industry	# of graduates	30	1990	30	1995		30		30		University of the West Indies
Increased capacity to produce skilled employees for export oriented industries	# trained		1990		1995						PEAP II Evaluation
	longterm	25		25			25		25		
	shortterm	30		30			30		30		
Upgraded B.Sc. management program measured by number of area specialization	# of areas	0	1990	3	1995		0		1		University of the West Indies
Enhanced capacity in fiscal policy and economic analysis	# economists trained	0	1990	20	1995		4		5		LAC Bureau Regional Sir Arthur Lewis Advanced Training in Economics Program

HANDOUTS

GUIDELINES ON GENDER IMPACT ASSESSMENT AND REPORTING

Definitions and Concepts

The following key concepts summarize the basic definitions and analytical framework for considering gender.

1. "Gender" is a socioeconomic variable which refers to the comparative or differential roles, activities, degree of participation and degree of benefit of both women and men in development. Gender means what a society or culture prescribes as proper masculine and feminine roles and activities, while sex applies to fixed male and female biological characteristics. Because women have more often been left out of the development process, a special effort often needs to be made so that women as well as men participate in and benefit from development; this effort has become known as Women in Development (WID). A.I.D. has long emphasized integrating attention to the effects of gender differences in all its relevant activities. WID does not mean leaving men out; it means ensuring that women are included. "Gender-neutral" approaches assume equal access, but do not take into account the constraints which gender differences impose to access.

2. Gender differences usually operate in association with other socioeconomic variables. Neither all men nor all women necessarily share the same interests, concerns or status, rather these vary by race, ethnicity, income, occupation, age, level of education, etc. However, the concerns and status of men and women within groups, whether racial, ethnic, age or class, will also differ.

3. Gender affects economic as well as social development objectives. It is much more than an equity issue; it is an issue which affects economic growth as well as social stability and well-being. A.I.D. experience has demonstrated that considering and enhancing the roles and contributions to the economy of women as well as men promotes development and sustainability. Increased economic participation by women has also had a direct impact on lowering birth rates and improving nutrition and education levels for children.

Gender Impact Assessment and Reporting

1. Gender is frequently an important variable in terms of project, program and policy effectiveness. In order to assess whether and to what degree gender-differentiated factors (as well as other socioeconomic variables) might affect the expected outcomes of development interventions, key questions need to be asked during the strategic planning process and during the design, implementation and monitoring and evaluation stages of the project/program cycle.

- Who needs to be reached for action to occur? (by sex and other relevant variables)
- Why, or so what? What difference would it make if these groups participate or not? What are the implications for achieving objectives?
- How can these groups be reached? (different means may be necessary for different groups; different constraints may exist because of gender roles and activity patterns and differential access to resources)
- How will we know? What information is needed to determine who participates and what may result?
- What happened? Are the expected results being achieved? If not, why not? What changes are needed?

2. If gender is a relevant variable, it must be taken into account in determining project and program performance. Sex-disaggregated indicators or other means of determining gender impact are necessary if gender is likely to be relevant to achievement of outputs and objectives.

3. Attention to gender does not mean adding an extra data collection burden; rather it means focusing on the data really needed to illuminate impact--not more but better information. The following type of information should be sought in order to determine gender impact:

   - The extent to which both sexes participate in the key activities under the program outputs and strategic objectives and the effects of gender roles, including a) the way in which they participate, e.g. as active participants in decision-making and/or implementation or as recipients of services; and the types of activities, e.g. training, credit, employment. b) The numbers or percentages of males and females in key activities.

   - The impact of participation by women and men in these activities and the degree to which this has contributed to achievement of program outputs and strategic objectives. Include a) identification of gender-based obstacles to participation and how they have been dealt with; b) lessons learned.

4. Attention to gender provides an excellent measure of people-level development impact which can be plausibly attributed to project and program interventions. Performance reporting should summarize gender impact in terms of the information above to the extent it is relevant and available.

SUSTAINABLE DEVELOPMENT CONTINUUM

Level V OVERALL GOAL (people level impact):
Sustainable increases in both productivity and income of local people

Level IV changes will lead to sustainable increases in both productivity and income of local people (Level V)

Level IV Improved resource base:
Natural, financial and human resources

Level III deals with adoption of better practices by local people--positive changes will effect positive changes at Level IV

Level III Types of choices made by individuals and households about practices:
Adoption of practices which should facilitate development of an improved resource base

Level II deals with the various conditions that may at present prevent people from adopting practices which maximize effective resource use

Level II Conditions which favor, enhance or promote new choices:
Planning policies, legislation; management and administration; economic considerations; technology; sociocultural aspects

Level I efforts that will help bring about changes in the conditions local people are presently facing

Level I Activities which bring about changes in Level II conditions:
Improved policy and planning climate, better management and administrations, better organizations, more equitable law enforcement, financial assistance, credit, market and banking support, technical assistance, participatory improvement of conditions

LEVEL I INPUTS

PROMOTE, ENCOURAGE POLICY AND PLANNING CLIMATE

UPGRADE MANAGEMENT, MORE EFFECTIVE ADMINISTRATION, BETTER ORGANIZATIONS, MORE EQUITABLE LAW ENFORCEMENT

PROMOTE, DEVELOP OR PROVIDE: FINANCIAL AND MATERIAL ASSISTANCE, CREDIT, MARKET AND BANKING SUPPORT

COMMODITIES, MATERIAL AND EQUIPMENT PARTS

OTHER SUPPORT, OPERATION AND MAINTENANCE SERVICES

WHAT WID IS/IS NOT

Some myths and facts about Women in Development

In the context of A.I.D., with its emphasis on economic development and the optimization of human resources, Women in Development (WID) is often confused with other issues and with remnants of its earlier forms.

WID is a dynamic concept that has changed dramatically over the years. Thus, there is much "information" about WID that is now misinformation. Some of the current thinking is accurate but incomplete. This results in myths, widely-shared perceptions, that are often out of phase with current reality.

WHAT WID IS NOT

1. WID IS NOT A SPECIAL INTEREST

Some development professionals still assume that WID is an appeal to a small, politically motivated group who must somehow be pacified so that we can get on with the serious business of development. In fact, WID is now accepted as a serious approach to mainstream development activities. It has become hard to conceptualize WID as a special interest concern when 50% of the world's population is female.

2. WID IS NOT WOMEN-ONLY PROJECTS

There was a time when WID was strongly associated with projects that were specifically identified as "women's" activities. Some of these became stereotyped as "knit-one, purl two" projects. In fact, certain women-only projects are appropriate, even vital. But the concept of WID now extends well beyond such efforts.

3. WID IS NOT WOMEN'S COMPONENTS ATTACHED TO MAINLINE PROJECTS

Tacking WID projects, sub-projects, or components on to larger efforts is sometimes desirable. But, again, the ultimate objective is now to integrate women appropriately, throughout all programs and projects.

4. WID IS NOT PROJECTS LINKED TO "TRADITIONAL" WOMEN'S CONCERNS

Women should be included in all development activities. Some sectorally linked activities such as those in health, nutrition, and population seem to be associated in some people's minds with "natural" women's activities. Certainly, women are central to success in the areas cited. However, we now know that omitting consideration of

gender in project design, implementation, and evaluation not only leads to systematic elimination of women and girls. It also imposes a major constraint on project success, regardless of the sector.

5. WID IS NOT JUST AN EQUITY ISSUE

Equity is a humanitarian goal. Economic integration is a development objective. The two are compatible, but there are differences. It is important to development professionals to keep the consideration of gender in economic perspective. Failure to consider females, their particular roles, their contributions to the economy, and the constraints on their time and activity leaves a key development variable undetermined, and sustainability is threatened.

6. WID IS NOT LIMITED TO SOCIAL SOUNDNESS ANALYSIS IN THE PROJECT DEVELOPMENT PROCESS

Development professionals have long regarded WID as located within the social soundness facet of development. And, of course, looking at women as well as men in terms of their roles as beneficiaries continues to be important. However, if we look at gender from a development perspective, we must see it as a critical variable in the economic development of a country.

7. WID IS NOT SIMPLY BENEFICIARY ORIENTED

Women must be regarded in terms of their status as beneficiaries of program and project activities. But their role in development needs to be upgraded and they should be systematically included as actors, as producers, and as agents of development.

WHAT WID IS TODAY IN A.I.D.

1. A CROSS-CUTTING ISSUE

Gender plays a role in every development sector or activity. Within the mainline sectors such as agriculture, natural resources, private enterprise, and education, we pay a high price for mistakes made by not including a gender perspective.

2. AN ECONOMIC VARIABLE FOR PROGRAM/PROJECT SUCCESS

Put simply, failure to include gender in program and project design, implementation and evaluation is probably one of the major causes of undetermined or negative outcomes in development work. If women are, in fact, heavily engaged in agricultural production, and the constraints and opportunities for their access to inputs, credit, land, and markets is different than for men, failure to factor these elements into development activities is simply starting from a weak data base and the odds of project failure are increased. The role of women in agriculture, private enterprise, and other sectors is better

understood now than it was a decade ago. The research evidence is incontestable. Women are a vital part of all sectors and their invisibility as a development variable is itself recognized as a design flaw. Such a flaw often precludes success in programs and projects.

3. AN INTEGRATED DEVELOPMENT APPROACH

The term WID may be unfortunate. It focuses attention on women to the exclusion of men. In fact, WID, as a concept in A.I.D., has evolved and now connotes gender integration. According to a CDIE analysis, "during project implementation, internal reporting systems should provide feedback on the relative proportion of project resources going to men and women and to various socioeconomic groups, so project managers can assess the significance of gender-related factors". In order to assure maximum development effect, we know that we must focus on gender as a variable. Thus, we emphasize gender-disaggregated data collection as one method of assuring that members of both groups are properly factored into programs and projects.

The apparent irony of disaggregating by gender in order to assure integration is not an irony at all. It allows development design, implementation, monitoring, and evaluation to proceed with a clear sense of the relevant human populations affecting and being affected by economic development.

Integration is symbolized by Agency actions such as the use of both men and women WID officers in USAIDs and Bureaus, as well as in R&D/WID. Some USAIDs and Bureaus have WID task forces or WID committees in which membership is based on position rather than on gender.

4. A MEANS FOR ENSURING INCREASES IN WOMEN'S PRODUCTIVE CAPACITY AND HEALTH STATUS

The development of women's productive capacity is now assumed to be a necessary condition for sustainable economic and social progress. Evidence strongly suggests that women tend to spend their money in ways that are linked to improved health and nutrition for their families, increased education, and lower fertility. Moreover, they tend to provide returns on loans that make them a very good credit risk. Thus, economic growth and consideration of gender are entirely consistent.

INDICATORS FOR ASSESSING INTEGRATION OF GENDER-CONSIDERATIONS INTO A.I.D. ACTIVITIES

A.I.D./Washington has developed a set of indicators to be used to monitor the integration of women into the Agency's activities. The indicators listed have been cabled worldwide. These indicators fall into three categories: (a) those relating to program, project and reporting documents; (b) those relating to training of USAID staff; and (c) those relating to participant training.

As required in the administrator's WID action items (State 218365) and by congressional legislation, when items are impossible to achieve, A.I.D. "will ensure that there is a substantive analysis as to the obstacles preventing completion of such efforts and an explanation of how these obstacles will be overcome."

A. Program, project and reporting document indicators: Documents developed in the future for new and ongoing activities should include the indicators given below.

(1) Document includes sex-disaggregated data in all references to participants and beneficiaries.

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(2) Document identifies constraints to women's participation in all development activities.

(3) Document identifies opportunities for enhancing women's participation.

(4) Document describes strategies to overcome these constraints or make use of these opportunities.

(5) Document identifies benchmarks to measure progress in implementing these strategies.

B. Training of USAID staff indicators: Bureau WID action plan should include initiatives that have been, or will be, taken to provide WID training to A.I.D. staff. Indicators used by PPC/WID include description of the training activity, number and job titles of staff trained.

C. Participant training indicators: Bureau WID action plan should include initiatives that have been, or will be, taken to increase the number of females in participant training programs. Indicators used by PPC/WID include information on the:

(1) Number of men and women included in participant training programs.

(2) Constraints to women's participation.

(3) Opportunities for enhancing women's participation.

(4) Strategies to overcome these constraints or make use of these opportunities.

(5) Benchmarks to measure progress in implementing these strategies.

GENDER CONSIDERATIONS IN DOCUMENT REVIEW

These Guidelines are a summary of recommendations for the incorporation of gender considerations into A.I.D.'s programming documents. They have been culled from a variety of sources, both within and external to A.I.D. The Guidelines are most useful as a tool to review program or project design documents to ensure that gender issues have been included appropriately.

GUIDELINES

- Disaggregate data by gender wherever possible; where data is needed but not available, indicate how it will be found and how incorporated.

- Use gender distinctions in terminology (e.g., men and women farmers, male and female entrepreneurs) in order to define more precisely the social context and impact of A.I.D.'s work.

- In project assistance
  - Disaggregate by gender:
    - project objectives where appropriate
    - benchmarks for project monitoring and evaluation
    - beneficiaries
    - logframe (objectives, monitoring, etc.)
  - Incorporate gender consideration throughout the project design document; in project implementation, technical analysis, and economic analysis sections as well as in social soundness analysis.
  - Describe in explicit terms in-country strategy, project identification, and project design documents:
    - Strategies to involve women where gender analysis indicates women are active in program or project sectors;
    - Benefits to women and men.
  - Include decision points in the project implementation schedule that allow project modification or redirection to incorporate gender considerations as baseline or project monitoring data becomes available.

GENDER DISAGGREGATION OF DATA COLLECTION AND ANALYSIS

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Background

The 1985 Nairobi conference marked the close of the United Nations Decade for Women (1976-1985) with the consensus of 158 countries on the "Forward Looking Strategies for the Advancement of Women." The "Strategies" stress the importance of accurate statistics on women as a means to improve their status by identifying inequalities and providing a means to monitor progress. For example:

> Governments should help collect statistics and make periodic assessment in identifying stereotypes and inequalities, in providing concrete evidence concerning many of the harmful consequences of unequal laws and practices and in measuring progress in the elimination of inequities (UN 1985,[1], para.58).

Today in 1990, many governments and international agencies recognize that the full and effective integration of women in the development process is necessary for national and international economic growth and democratic pluralism. For the effective use of a nation's human resources, it is necessary for all social groups to participate in the development effort and to share in the distribution of benefits. Exclusion of one half of the population - women - represents a dramatic loss of human potential.

However, a great deal remains to be done in the statistical documentation of women's economic contributions and women's full integration in the development process. There has been heavy criticism of the most common indicators of economic production labor force statistics and systems of national accounts - for their under-reporting and under-valuing of women's economic contributions.

There are several reasons for the lack of readily accessible, accurate data on women's economic roles and status:

- o Data have not been collected and/or published in a gender disaggregated form in al cases;
- o The instruments used to collect census and survey data do not accurately measure women's economic inputs;
- o Data are often difficult to access from developing countries;
- o The economic roles of women in most developing countries are changing so quickly that data analyses are outdated before they are completed.

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Rationale for Improved Gender Disaggregated Data:
Reliable gender disaggregated statistics on economic participation and status are needed because:

- o All officially published data should be as accurate as possible;
- o It is essential to have data on women's situation in relation to that of men in order to give fair, equitable treatment to women;
- o Improvement of methods for collection of data on women will improve the overall quality of data collection, particularly for labor force participation;
- o Policy making must be based on accurate data.

Use of biased economic indicators produces a distorted picture of the nature of the economy and a country's human resources. For example, errors on the size of occupational distribution of the labor force by gender lead to erroneous assumptions about labor trends and inaccurate projections. Inaccurate and contradictory data make it difficult to understand the composition of the labor force or to make cross-country comparisons.

For example, in Egypt, two successive national labor force surveys produced almost identical results for the male labor force and large differences for the female labor force (69 thousand female farm workers in 1982 (2% of total farm labor) and 794 thousand in 1983 (17% of total farm labor)). The difference in results was due to a conscious effort to improve measurement non-productive domestic work done in farm households by women. While the lower 1982 figure for women's farm labor is consistent with the results of earlier censuses, the higher 1983 figure is consistent with a detailed rural labor record survey and recent time-use surveys (Dixon-Mueller and Anker 1988, pp. 27-28).

Comparison of censuses and household surveys in four countries in Latin America indicated that the census data reported a significantly lower rate of female participation. In Sao Paulo Brazil, the census under-enumeration of women's labor varied by age group from 14% to 33% (UN and INSTRAW 1986, p.65).

Historical analysis of changes in questions used to elicit economic activity for the Nigerian census showed a reclassification of women's work from economically active to inactive as their activities were re-labeled as housework. In 1931 men and women were reported as equally economically active. By 1952, only one-tenth of the women were reported as economically active (Nuss 1989, p.18).

Census Data Coverage on Women
Three general types of limitations of census data:

- o subject coverage (eg. rarely include measures of income or wealth);
- o quality (eg. inaccurate measurement of women's labor force

participation);
- o availability (eg. data on economic activity may be available only for males)

The data on women are relatively accurate and detailed for:
- o fertility,
- o education,
- o mortality.

The deficiencies are greatest in:
- o economic activities (limited statistical information and research on women's productive activities in different spheres of the economy; differential access to resources at household, community, and national levels by gender, and institutional constraints on women's participation in development.

- o household headship and intrahousehold allocation and control of resources.

Factors That Influence the Quality of Survey Data on Women (in addition to survey design):
- o Survey Organization Factors
  - Sex composition of survey organization team
  - Sponsorship of the survey (nationally and locally)
  - Publicity for the survey
  - Rewards for participation in the survey
  - Timing of the survey during the agricultural cycle

- o Interviewer Effects
  - Sex of interviewer
  - Training of Interviewer
  - Previous experience of interviewer (on other surveys)
  - Social background of interviewer

- o Respondent Effects
  - Sex of respondent
  - Use of proxy respondents
  - Perception of the use of the survey
  - Sex differential in language facility of respondents

(from UN and INSTRAW 1988, p.2[illegible]).

Improving and Using Census Data:
There is a need to:
- o collect relevant information by gender (as well as other relevant characteristics such as age, ethnicity, class);

- o analyze to monitor progress and identify problems;

- o incorporate findings on gender differences in planning and policy making at local and national levels.

Gender Disaggregating Program Performance Indicators

by Mari H. Clark, Office of Women in Development

The WID office is providing technical assistance for integrating gender issues into CDIE's Mission-level program performance monitoring and evaluation pilots and will assist in the Agencywide effort to develop a performance monitoring information system. This article describes this collaborative effort.

Over the past year CDIE has conducted numerous program management and evaluation pilots to help selected Missions develop model performance information systems. Each pilot provides assistance on the following: (1) strategic planning and information needs assessment; (2) design and implementation of appropriate program performance monitoring, reporting, and evaluation systems; and (3) application of program performance information in Mission management and reporting. The WID Office is placing gender specialists on CDIE teams and providing direct assistance to CDIE staff to assist them in integrating gender issues and gender disaggregated indicators into the model performance information systems.

Based on the lessons learned to date from this collaboration, it is clear that issues related to the status of women and their full participation in activities supported by Missions cut across all programs and influence the achievement of strategic objectives. Thus it is important to measure women's integration into these efforts as participants in, agents for, and beneficiaries of the achievement of strategic objectives. To do so, it may be necessary to identify one or more indicators for strategic objectives that measure male and female participation and impacts. All indicators or output measures expressed in terms of individuals or a proxy should be gender disaggregated.

Gender Disaggregated Program Performance Indicators

Gender disaggregated indicators for measuring program performance must be developed on a country-by-country program basis. Most gender disaggregated indicators are found at the level of project and program outputs contributing directly to Mission strategic objectives. Measures developed at the level of strategic objectives may also include at least one gender-disaggregated, people-related performance indicator.

A number of indicators appear in a wide range of Mission strategies. The following examples illustrate gender disaggregation of some of these indicators. This list does not include all the indicators that should be gender disaggregated.

- *All Sectors*

Income and employment generated by project activities; number of participants in training by type of training; number of extensionists.

- *Agriculture*

Number of persons receiving technical assistance and extension activities by type of assistance and extension input; number of loans applied for and granted; participation in food production, processing, and marketing.

- *Natural Resources Management*

Changes in time and labor allocation for people who participate in and benefit from project activities, by type of change; participation in natural resource management and tasks; baseline data on resource management.

- *Health*

Decreases in infant mortality rates; access to and use of health services; improved nutritional status of children (weight for age); number of persons with improved access to clean water and sanitation; use of health services and commodities.

- *Education*

Ratio of girls and boys enrolled to the eligible population in project target areas; completion rates at each level of schooling.

- *Private Sector*

Number and types of jobs created; firm owners and managers by size and type of firm; number and size of loans applied for and granted.

- *Democracy*

Ratio of population voting rates; land ownership and registration; participation in local, regional, and national government (holding office).

- *Housing*

Number of housing/home improvement loans applied for and granted; home ownership.

In many instances indicators and program outputs are not expressed in terms of people participating in or benefiting from Mission activities. Instead they refer to macroeconomic conditions (e.g., government deficit as a percent of GDP), measures of infrastructure development (e.g., kilometers of roads), and the quantity or monetary value of program commitments and returns (e.g., number of export marketing information systems). The indirect impact of these macro-level indicators at the micro level (people-level impact) can be assessed through linking studies. The link between macro and micro levels is an appropriate and necessary component of project design and evaluation.

A.I.D. experience to date suggests the following criteria for developing useful program performance indicators:

- Strong link to impacts on the lives of people—both women and men
- Strong link to A.I.D. efforts
- Relevance and credibility to a broad range of decision-makers
- Feasibility to secure objective measurement at reasonable cost

There are a few basic recommendations for efficiently maintaining and further developing a gender disaggregated program performance information system.

- Incorporate gender disaggregated program performance information into *existing* reporting, review, and decision-making systems.
- Collect only information that is likely to be used and only when the costs of data collection and analysis are less than the expected benefits.
- Keep program performance information as simple as possible.
- Use existing information as much as possible (e.g., demographic and health surveys, census, and other survey data.)
- Use project mechanisms to collect and analyze most additional gender disaggregated program performance information.
- Place as much emphasis on analyzing and interpreting information as on collecting data.
- Take advantage of opportunities to strengthen private and public program activities in the host country.

Additional information on CDIE's program performance evaluation efforts can be obtained from Gerald M. Britan, PPC/CDIE, Room 219, SA-18 (703) 875-4964.

IMPROVING THE MEASUREMENT OF WORK

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Several key areas require attention to improve the quality of measurement of both women's and men's work.

1. Definition of economic activity (Paid vs. Unpaid)
   In 1954 the definition of economic activity of the International Conference of Labor Statisticians was "all persons who worked for pay for profit."

   In 1966 and 1982 they revised this. The 1982 definition includes: "all persons of either sex who furnish a supply of labor for production of economic goods and services as defined by the UN system of national accounts and balances."

   According to the UN definition, production of economic goods and services includes "all production and processing of primary products whether for market, barter, or own consumption." If it is for own consumption, it must comprise an important contribution to the total consumption of the household.

   In actual practice there has been inconsistency in the definition of economic activity, and a tendency to count only formal labor force participation while excluding unpaid family work in agriculture and the informal sector as well as household activities such as carrying water and wood. The result has been the undercounting of women's economic contributions.

   Rather than unemployment, in many instances women are characterized by underemployment, that is they would like more work than they can get, they work for low wages, and/or their skills are under utilized.

2. Multiple Jobs
   In most developing countries, poor individuals and households maintain diversified portfolios of labor and business as a survival strategy in times of economic crisis. But standard census enumeration records only one of these several economic areas. Women are more likely than men to engage in several part-time activities to coordinate them with their domestic/child care responsibilities.

3. Time Reference Period/Hours Worked
   Questions asking about work also screen economic activities in terms of the number of hours worked in the past month, week or year. This can also eliminate part time and seasonal labor from consideration as economic activity.

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4. Labor Productivity Measures

In addition to labor factors (e.g., skill, motivation, strength), it is also necessary to assess non-labor factors (e.g., access to credit and technology, transport, services, organizations) as they differentially affect the productivity of women and men.

5. Return to Labor

It is important to differentiate whether women's lower income is due to part time work (i.e., not wanting to work full time) or low wages. Returns to labor are considered important to household decision-making such as education of male and female children, migration of household members, and economic decision-making power within the household.

6. Occupational Segregation

Although there is variation, women worldwide are clustered in a limited number of occupations which have the lowest rates of return and businesses which require the smallest capital investment. This appears to be the case for the informal sector as well as the formal sector. Better data are needed on sector and subsector gender segregation of employment.

7. The Informal Sector

Although there continues to be disagreement on the definition of the informal sector, there is agreement that this is relatively unknown territory in which women play a major economic role in most countries. In many cases, it constitutes roughly a third of the national economic activity that is neither enumerated in national accounts nor factored into national planning. This is another area that requires more gender disaggregated data collection and analysis.

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