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CONCEPTUAL FRAMEWORK AND  
TERMS OF REFERENCE FOR

A PILOT CASE STUDY:

TO ANALYZE AND MONITOR THE IMPACT  
OF TANZANIA'S ECONOMIC RECOVERY PROGRAM

ON WOMEN:

ESTABLISHING A BASELINE

AND

TRACKING SYSTEM

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This study is intended as a limited, pilot effort to test a research and monitoring methodology appropriate to the situation in Tanzania under its Economic Recovery Program. The study is designed:

- to establish a conceptual framework for looking at the impacts of structural adjustment programs on the female human resource base of Tanzania;
- to select and test potential indicators of economic impact on the poor rural and urban female population base;
- to establish a cost-effective baseline of datapoints that are
  - available
  - relatively inexpensive (in terms of cost, time, management) to obtain
  - able to be measured and monitored as "development happens"
  - indicative of the impact, directly or, in some cases, indirectly, of structural reform (stabilization, adjustment, recovery, growth) efforts
- to set up and test a tracking system that is feasible to maintain and monitor;
- to provide a basis to mission for host-country policy dialogue.

Because it is so difficult to measure the net effects of gains and losses among various population sub-groups and to define the complex interrelationships, correlations and covariations, the study does not attempt an overall analysis of the effects of adjustment on women. It is meant to provide illustrations and examples and to establish and test a relatively rapid research and cost-effective monitoring methodology that can be refined and adapted to the realities of the Tanzanian development setting.

This study will examine, therefore, only some of the large variety of potential indicators of impact and the nearly infinite set of possible datapoints that could be considered. Since ours is not "the best of all possible worlds," the effort is meant to be adjusted and refined.

It will not only provide the basis for obtaining information that already exists, "cleaning it up" and using it, as is best possible, to test a set of economic adjustment hypotheses. It will also provide grist for policy dialogue and recommend cost-effective means for improving the existing information collection and management system.

There are new challenges to and implications for policy makers concerning such an analysis. It should:

--challenge them to increase the participation of women or other targeted population sub-groups in activities that are expanding under the economic recovery program;

--cause them to examine carefully the costs and benefits of their interventions and strategies;

--encourage them to give priority to strategies that quickly benefit large groups of the less advantaged in order to maintain realistic support from the population for economic recovery efforts.

NOTE: The conceptual or analytical framework suggested here is a composite of information and ideas from sources cited in the annex. They include:

- The Gender Information Framework presently being developed by AID/PPC/WID
- "The alleviation of Poverty under Structural Adjustment," L. Demery and T. Addison, World Bank, 1987
- Discussions with development professionals and practitioners
- my own perceptions of and philosophy about the people involved in change and development.

### STAGES IN ECONOMIC RECOVERY

For facilitating discussion and analysis, some development specialists divide the recovery process into distinct phases.

- |     |               |   |
|-----|---------------|---|
| I   | Stabilization | immediate--no negative changes in absolute and relative levels of chosen indicators of impact   |
| II  | Adjustment    | immediate and short term--make full use of the productive capacity of the human resource base <u>but</u> protect those aspects which are vulnerable               |
| III | Recovery      | midterm--expand and tap the productive capacity of the human resource base <u>and</u> protect vulnerable groups   |
| IV  | Growth        | mid and longterm--maintain levels of use and rates of expansion of the human resource base <u>while</u> maintaining or improving levels of protection as required |

These stages or phases are academic but they can help set the stage for discussion.

If we consider the case of Tanzania, one would probably say that the country is somewhere in the second stage and heading toward the third.

## BROAD GOALS OF THE STUDY

The study would have, as its broad goals, to provide and test a methodology for obtaining and tracking information relating to:

### USE OF PRODUCTIVE CAPACITY OF WOMEN

### EXPANSION OF PRODUCTIVE CAPACITY OF WOMEN

### PROTECTION OF VULNERABLE GROUPS AMONG THE FEMALE POPULATION

The study will be limited in scope and will seek to establish a basis for broader efforts. It will deal with only a few indicators, some datapoints, information that already exists, and two, or at most, three geographical areas in Tanzania to be used to conduct verification surveys and to assess women's perceptions and views about the economic recovery and their role in it. The baseline dataset, the indicators of change and the tracking system will, of course, be used as a basis to monitor and assess impacts of the economic recovery program on Tanzania's female human resource base as well as to provide information for policy dialogue.

It should be noted that, although this study is directed specifically at the female population in the country's human resource base, it has far broader implications. Indeed, there are those who assert that, if one gains information regarding women in an economy, that information is a reliable surrogate for the poor population as a whole. If programs and projects appropriately address women's issues, then a nation can be relatively assured that issues relating to the majority of the poor population are also being addressed.

## IMPACT INDICATORS

Some indicators of positive impact include:

1. Women's access to (use of) productive assets increases
2. Women's return on productive assets increases
3. Women's employment opportunities improve
4. Women's participation in training and education improves
5. Women's use of health services increases
6. Women's participation in decision-making increases
7. Live birth weight increases; other reproductive indices improve (infant mortality, fertility level, maternal mortality, etc.)
8. Transfers (direct food aid, subsidies, direct medical aid/subsidies, etc.) to women decreases relative to total food production

It is obvious that there are many more indicators that could be conceived and recommended. Not all of those that can be conceived could, in fact, be measured. There are economic, social, cultural and political reasons that, in combination or individually, make measuring and monitoring undesirable or ineffective.

For each indicator, there is a myriad of data points and a nearly unlimited number of combinations and permutations for their use. Therefore, a critical challenge to this research effort is to select a set of information and data that is available (though it may take considerable skill and effort to find it), can be efficiently gathered and that can be effectively monitored.

The study contractor should determine which indicators and which datapoints are available in and appropriate to Tanzania and justify the selection.

The sample matrix attached is intended to help organize information and establish a conceptual framework for the study that can be discussed, revised and, finally, employed. It is, at present, incomplete but serves as an indication of the organizing principles to be used for the study.

The contractor's major deliverable must be in useful, useable and USED information.

Some researchers claim that monitoring the impact of adjustment programmes on women can be done effectively by using health and nutritional data, time budget and other resource use studies, and surveys which examine the intra-household system of resource allocation and control. Priority should be given to monitoring the impact on:

- women in low-income urban and rural households;
- women employed in the public sector;
- women farmers;
- women in the private sector.

The contractors for the Tanzanian study should consider these sectors, and include in their research, those groups appropriate to Tanzania's socio-economic realities.

A FEW EXAMPLES  
OF POSSIBLE DATAPOINTS  
SET WITHIN THE BROAD GOALS  
OF THE STUDY

USE of productive capacity

baseline points:

percapita income-women  
percapita income-men

possible indicator/index:

percapita income women/percapita income men.  
What is indicated as this fraction approaches  
unity? What are the implications of change?  
What policy decisions about wage rates for women  
and men relate to these datapoints? Are policies  
directed at increasing jobs for women in sectors  
of the economy that are expanding under the  
recovery program? Do women have timely access to  
credit so they can use their labor to generate  
incomes? Do they really have access to and  
control over the inputs they need to be  
economically effective?

monitor:

change in ratio of percap income women/percap  
income men  
change in percap income women  
change in percap income men  
rate of change of the above

The study contractor will have to determine what data specific to measuring and monitoring women's access to productive assets are available or can economically be used. The data relevant to this broad indicator include information about women's access to land, labor and capital as well as their use of needed technologies inputs and services. Points that may be relevant include women's use of agricultural information and extension services, their access to credit, the level of their employment in critical sectors of the economy.

EXPAND productive capacity

baseline points:

expenditure per capita on women's education  
expenditure per capita on men's education

possible indicator/index:

ratio of percap expenditure on women/percap expend on men--What is indicated as this fraction approaches unity? What policies impact, either directly or indirectly, on education for girls and women? Does a rise in adult women's employment result in the need to pull their daughters out of primary school to carry the burden of family support such as caring for infants in the household? Does the government have a basis for forming policies which cut public expenditures in areas less critical to the education of girls and women so that their education and ultimate economic productivity is not compromised?

monitor:

change in ratio of percap expend on women/percap expend on men  
change in percap expend on women  
change in percap expend on men  
rate of change of the above

As with the previous broad impact indicator, the study contractor will have to determine exactly what data and information is economically appropriate to establish and tract impact on women's return on their productive assets. They will also have to verify that what is measured is relevant and meaningful in Tanzania.

Possible datapoints that lend themselves include information on real wages and real farm and urban incomes for women, their purchasing power, their access to markets and marketing. Researchers should also consider data on prices of inputs needed by women, market distortions that affect the returns to their productive activities, indicators of improving women's use of markets, roads, transport, information and extension services, chamber of commerce services, credit, technologies that reduce burden, time or increase productivity in other ways. If relevant and feasible, information should be included regarding women's access to and control over income (once earned), use of and contribution to production information (extension services, village councils), participation in decisions about markets, marketing, transport and the like.

This broad indicator area is probably the largest and potentially most critical during the recovery phase. Policies regarding it must be most carefully planned and implemented since the interrelationships are often indirect and the impacts often not even considered. This area includes indications regarding improving not only women's returns on productive assets but also their employment opportunities, their access to and participation in training and education, their use of health services, their participation in decision making.

PROTECT vulnerable women

baseline points:

percapita food aid to women  
total food production for national consumption

possible indicator/index:

percapita food aid to women/food production  
total--What is indicated as this ratio  
increases? What rationale can be stated  
regarding its use in policy discussions? Is food  
aid viewed as an interim measure needed to help  
vulnerable poor population groups through the  
transition to economic self-sufficiency? What  
policies may cause prolonged dependency and  
possibly undermine efforts needed to encourage  
economic self-reliance? Can resources be  
directed or prices be changed to promote food  
production by women by decreasing their time or  
labor burden?

monitor:

change in food aid per capita to women  
change in the ratio  
rate of change of the above

The study contactor will have to carefully select data points and ways of combining them for this broad indicator dealing with the protection of vulnerable women. There is considerable guidance in the literature regarding women as a vulnerable group because of socio-cultural conditions, beliefs and role definitions, and, especially, because of the biological realities women face as bearers of children.

Data regarding certain areas should be relatively easy to obtain, especially from the health sector. Datapoints that should be considered, individually or combined in some sort of (weighted) index include not only those relevant to foodaid but to women's health. Live birth weight of infants can be related to the mother's nutritional status during pregnancy. Fertility level decreases generally mean the reproductive drain on women is reduced. Decreases in infant mortality can be taken to indicate that demands on women to bear more children are reduced. Access to basic necessities such as adequate housing or potable water is often critical to urban women. The number of hours required to obtain, prepare and feed the family, if reduced, may indicate women have more time to ensure that nutritional quality is adequate for not only their husbands and children, but for themselves as well. And they may just have some time to do what they want to do for enjoying or educating themselves.

It should be obvious that the broad indicator areas, the specific indicators chosen and the datapoints that are used are interrelated and overlapping. One can establish a baseline indicator and monitor it. Interpretation of changes in the indicator may, for example, relate to both protection and, say, use of productive capacity. A woman's health has ramifications to her ability to work, learn, participate. Her health also has to do with her motivational level, her feeling of wellbeing, her very ability to have a living, healthy child and to stay alive and productive herself in the process.

Divisions among the indicators are, thus, for ease in data collection, analysis and monitoring. Interpretations depend on the skills, experience and creativity of the study contractors as well as those who will use the information resulting from this effort.

S A M P L E  
O R G A N I Z I N G  
M A T R I X

GUIDING PRINCIPLE	POSITIVE IMPACT INDICATOR	GENERAL DATA CATEGORY	MAJOR CONSTRAINT TYPE (SEE ATTACH 2)	MEASURE:		COMMENTS:
				-CURRENT LEVELS	-RELATIVE LEVELS	
				-CHANGE	-RATES OF CHANGE	
Use Capacity	1. Women's ACCESS TO (USE OF) Productive Assets Increases	USE OF Productive Assets	1, 7, Access to Land, Labor, Capital; Technology	Define Productive Assets (Land, Labor Capital, Technology, Transport). Measure current levels and distribution of employment, use of credit, technology used, etc.		Policies in land reform, improvement in terms for and availability of credit; distribution across productive sectors of women.
Use Capacity; Expand Capacity	2. Women's RETURN ON Productive Assets Increases	RETURNS ON Productive Assets	3, 4, 9, Returns to use of Land, Labor, Capital; Info; Technology, Services	Define Returns to use of Productives assets. Establish indices to determine real and net levels.		Purchasing power; Real wages, real farm income levels, real urban incomes; Improved production services (roads, transport, extension, information)
Use Capacity; Expand Capacity	3. Women's EMPLOYMENT Opportunities Improve	EMPLOYMENT	1. Access to Employment (Labor)	Labor force Participation, indicators of marginal employment; unemployment; Current inventory of women in high impact sectors (public, services, private, agricultural production, etc.)		Terms of Trade among/between sectors, lag times in reallocation of labor into a shifting scenario.
Expand Capacity	4. Women's PARTICIPATION in TRAINING & EDUCATION Improves	TRAINING, EDUCATION	5, Access to Training, Education	Institutional Capabilities, response to special needs (Timing, duration, child care, language of instruction)		Emphasis on expanding skills into new areas of employment/ occupation. Labor requirement burdens on the family pulls girls out of school;

14.

GUIDING PRINCIPLE	POSITIVE IMPACT INDICATOR	GENERAL DATA CATEGORY	MAJOR CONSTRAINT TYPE (SEE ATTACH 2)	MEASURE:		COMMENTS:
				-CURRENT LEVELS	-RELATIVE LEVELS	
				-CHANGE	-RATES OF CHANGE	
Use (Maintain) Capacity; Protect Vulnerable	5. Women's use of HEALTH SERVICES Increases	HEALTH SERVICES	3, Access to Benefits	Define health service use. Relate to productivity of women, measure time saved with good health, prevention of illness. Measure visits to clinics, availability of clinics, staff, medicines, etc.		-Major investment areas improductivity of the present and future human resource base.
Use Capacity; Expand Capacity	6. Women's participation in DECISION-MAKING Increases	Access TO INFORMATION ABOUT WOMEN FROM WOMEN	2, 9, Access to Decision-Making; Socio-Economic Integration	Access level and areas of involvement, socio-culturally feasible mechanisms for including women's input into decision-making; attendance at advisory councils, participatory research, use of information generated.		Look at family, community, local, government, donor groups, are women boards from villages to ministries?
Protect Vulnerable; Expand Capacity	7. Live BIRTH WEIGHT Increases; Other reproductive indices improve	HEALTH & NUTRITION	3, Access to Benefits	Live birth weight levels, changes, levels of fertility, infant mortality rates, Maternal mortality; to assess reproductive burdens or benefits		Many indicators of health and nutrition to indicate changes in status resulting from policy changes regarding pricing, exchange rates, etc. -- many indirect impacts
Protect Vulnerable	8. FOOD AID "INDEX" Improves	FOOD ASSISTANCE & OTHER TRANSFERS	3, Access to benefits	Levels of current food aid per capita, per women -- relate to levels of local food production. Levels of medical assistance, emergency support during crisis and rate of recovery -- changes in rate and direction		Need to protect vulnerable groups while they "cross" various economic deserts--interim measures. Care NOT to create permanent situation.

GUIDING PRINCIPLE	POSITIVE IMPACT INDICATOR	GENERAL DATA CATEGORY	MAJOR CONSTRAINT TYPE (SEE ATTACH 2)	MEASURE:	COMMENTS:
				-CURRENT LEVELS -RELATIVE LEVELS -CHANGE -RATES OF CHANGE	
etc	ect	etc	etc	etc	etc

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ATTACHMENT 2  
 PROGRAM/PROJECT GENDER CONSTRAINT  
 MAJOR CATEGORIES/TYPES

<u>CATEGORY/TYPE</u>	<u>DESCRIPTION</u>
1. Access to the Economic Base	Access Land Access Labor Access Capital (Credit) and other inputs
2. Access to Decision Making	Decision Making at All Levels (family, community, local government, national policy)  Access to Information (where, how obtained)  Feedback Loops
3. Access to Benefits	Control of Income Once Earned  Family Benefits (economic nutritional)  Social benefits, (i.e. increased) status
4. Extension/Information	Access to Extension Information (both agricultural and home economics)  Number of Female Extension Agents  Access (culturally and logistically) to male extension personnel
5. Training/Education	Is Training available, is it relevant, timely - Does Educational System provide knowledge, capacity, baseline skills?
6. Time/Pace	Time Availability (do new tasks save time, any additional burden created)
7. Useable Technology	Technology Affordable  Technology Available  Technology Repairable  Socially/Culturally Appropriate
8. Economic/Social Integration	Marginalize, isolate women Does participation or lack of it create social conflicts
9. Infrastructure	Existence of and access to markets  Transportation System
10. Other	This is category that allows for on-going development and evolution of a realistic and useable list of key factors

#### PEOPLE CONTACTED

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