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FINDING THE FORMULA: GUIDELINES AND HANDBOOKS FOR BRINGING "WOMEN IN DEVELOPMENT" INTO FOREIGN AID PROGRAMMING AND PROJECTS

Rae Lesser Blumberg

University of California, San Diego

Agency for International Development

Bureau for Latin America and the Caribbean

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In the early 1970's, the field of "women in development" (hereinafter, WID) emerged, its basic premise that females were the great neglected factor in Third World economic development. WID proponents soon collected impressive documentation that development assistance that failed to "take women into account" frequently resulted in harm to the females and/or the project itself (see, e.g., Boserup, 1970; Tinker, 1976; Dixon, 1980).

In 1973, the United States Agency for International Development became the first of the donor agencies to be explicitly enjoined to promote WID. Section 113 of the 1973 Foreign Assistance Act - better known as the "Percy Amendment" - mandated it to administer its development aid:

> ...so as to give particular attention to those programs, projects and activities which tend to integrate women into the national economies of foreign countries, thus improving their status and assisting the total development effort.

The Bureau for Latin America and the Carribbean (LAC) was in the forefront of AID's response to this mandate. It first began to implement this provision in a July 25, 1974 airgram sent by the Assistant Administrator, which stated that:

> All new and updated sector analyses and assessments and new loan and grant projects submitted for AID/W approval after August 1, 1974 will be expected to address the policy expressed in Section 113.

Since that time, both AID and LAC have grappled with the WID proviso with varying (but rarely impressive) degrees of success. One of the obstacles, according to a number of developers first confronting the WID issue, is the lack of "how to do it" information. A common query has been: "Isn't there some sort of a handbook or set of guidelines that we can use?"

This paper is aimed at clarifying the problem of providing WID guidelines or handbooks for the programming and project activities of LAC. Can and should there be explicit orientation concerning LAC's WID efforts?

In order to answer this question, I examined all of the available documents in LAC/Washington files aimed at providing guidance on WID. I discovered an early effort (1978) within LAC to develop a set of guidelines, and I found that the materials uncovered fell into two categories: (1) those oriented to donor agency/large development project use, and (2) those oriented toward grass-roots beneficiaries/small development project use. These categories will be discussed in turn. Where are the areas of coverage and where are the gaps in WID guidance? What "lessons learned" and what recommendations can be extracted from this examination of the available materials? Let us turn to the data.

I. INSTITUTIONALLY-ORIENTED GUIDANCE MATERIALS

A. The LAC Initiative

On October 27, 1978, William G. Kaschak of LAC/DR circulated a five-page "Outline" for a "Design Guide for Integrating Women into National Development." The document is organized under three headings: I. Objective ("Develop design guide for field staff for integrating women into national development"), II. Strategy, and III. Methodology.*

Kaschak's strategy involved refocusing the unit and perspective of analysis to what he termed the "primary socioeconomic unit." Although this unit is not explicitly defined, it is clear that it is to be described in terms of its constituent males, females and children. In this way, the "tacit perception of planning for males" would be reduced (p. 1).

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*A copy of this document is attached as Appendix A.

In his section on "Strategy," Kaschak outlined ways of focusing on this new unit of analysis at the following stages of the AID programming cycle: (1) CDSS, (2) Sector assessment, (3) PID, and (4) PP. His outline, however, does not extend past the design phase: he mentions nothing about implementation, monitoring or evaluation.

Under "Methodology," he proposed three elements of attack: (1) data gathering/ analysis involving his "refocused unit of analysis," (2) "analysis of institution from social perspective" (e.g., composition of staff), and (3) design workshops (intended to explain his refocused unit of analysis and demonstrate data gathering techniques to mission staff and counterparts).

To date, it does not appear that this LAC initiative has been followed up. While this seems to be the only example of a previous attempt to formulate clear guidelines for LAC WID efforts, it is not the only example of a promising LAC initiative on women in development that came to naught. The Bureau files on WID efforts reveal numerous attempts, by a dedicated and enterprising WID officer (Roma Knee) as well as others, to integrate females into a wide array of programs and projects. Institutionalization of WID, however, remained an elusive goal. In LAC, as elsewhere in AID, when females were considered, it was generally as a "special case," rather than as part of mainstream activities. Thus, it can be considered a plus that Kaschak's approach would not have isolated LAC attention to females by dealing with them apart from the normal round of social analysis and programming/project planning activities.

In fact, in one form or another, all of the remaining documents discussed under the "Institutionally-Oriented Guidance Materials" heading make the same point: to consider implementing WID only in terms of data, studies and projects that deal exclusively with females is the wrong approach. Rather, what

is needed is to deal with women and girls in context. Thus, for example, providing information on females' work activities, time budgets, school enrollment rates, use of credit, etc. without reference to comparable data for males overwhelmingly contributes to documents that sit on the shelf, as opposed to the "integration of women in development." With few exceptions, what are needed are data that are disaggregated by sex. Knowing the rough distribution of labor, resources and time burdens among men and women (and/or boys and girls) gives development planners and field staff a much better handle for incorporating WID than knowing more precise and detailed information pertaining to females alone.

B. The Harvard Approach

The document,"Women in Development: a Framework for Project Analysis" (prepared by Catherine Overholt, Kathleen Cloud, Mary Baughman Anderson and James Austin; mimeo, no date), goes far beyond Kaschak's promising but sketchy outline. First, it proposes a framework encompassing four interrelated components: (a) Activity Profile; (b) Access and Control Profile; (c) Analysis of Factors Influencing Activities, Access, and Control; and (d) Project Cycle Analysis. (These four dimensions are discussed and critiqued below.) Second, its focus extends farther along the project cycle than Kaschak's: it not only provides guidance concerning project identification and design, but continues into the two later stages of implementation and evaluation. This last point is an important advance in that all of the extant analyses of how well AID has incorporated women in development have found a great deal of slippage between project design and subsequent implementation and evaluation. Collectively, these studies assessed well over 200 AID projects in various world regions and discovered that attention to WID during project design (i.e., PID and PP stages) was

no guarantee that the plans would come to fruition during implementation.* In a number of instances, even elaborate plans to reach females seemed to have disappeared from the documents covering implementation and evaluation. (It was often unclear whether females were actually forgotten during implementation or whether the problem was merely that the documents failed to mention their fate during and after project execution; all these studies involved analysis of documents only and all called for field follow-up to explore this problem.) Accordingly, it is clear that any proposed new LAC guidelines/handbook on WID should follow the Harvard approach and cover the entire project cycle.

The Harvard approach is not yet comprehensive or consistent enough to be adopted as is for LAC "WID guidebook" purposes, however. It is somewhat inconsistent on interrelating its proposed four dimensions, and also is ambiguous as to when data should involve male/female comparisons vs. provide information on females only.

Specifically, the first two dimensions - Activity Profile and Access & Control Profile - admirably and explicitly call for data disaggregated by sex. In fact, the Activity Profile breaks down the performers of each productive and "reproductive" (e.g., food crop processing and storage, household maintenance) activity by both age and gender. However, it does not suggest such a breakdown for the time and location involved. Moreover, while it makes a major contribution in calling for male vs. female data on access to and control over resources and benefits, it does not link the Activity and Access & Control Profiles. Such a link is essential in any proposed LAC "WID guidebook," I suggest. The women in development literature abounds with examples of pro-

*These studies, which analyzed AID project documents to assess progress in WID, included: a sample of 49 Asian projects (Blumberg, 1982), a sample of 45 LAC projects (Blumberg, 1983), a world-wide sample of 32 projects (Dixon, 1980), and four of the reports from the current PPC/CDIE study involving a sample of nearly 100 projects world-wide (Fortmann, 1984 on agricultural development; ICRW, 1984 on income-generation and employment; Anderson, 1984 on education, and Davenport, 1985 on energy).

jects that were damaged or destroyed because they failed to provide women with incentives and resources generated by their own labor. To give one instance (quoted from Dixon, 1980:65):

> A classic example comes from the reorganization of a marketing cooperative in the pyrethrum industry in Kenya. Whereas women had been growing the crop and selling the dried flowers directly, the new cooperative returned payments only to formal members, who were mostly men. The women became discouraged by the loss of personal incomes which they had formerly controlled; "rationally and realistically in the circumstances, their output fell" (Apthorpe, 1971:73).

Many other examples document the declines in women's absolute or relative position when development projects alter the distribution of incomes and assets within the family. In Belize, in another "classic case," women lost their economic independence and family nutrition fell when the men shifted from corn to a sugarcane cash crop: sincethe corn had fed the women's pigs and chickens as well as the family, the women lost their main income source (Stavrakis and Marshall, 1978).

A number of studies have found a connection between females' household decision-making power and the extent to which they contribute independently controlled economic resources. Thus, women's input into household decisions ranging from fertility to farming practices can be undercut when projects fail to take into account extant patterns of male/female resource control and project impacts on same.

In short, while the Harvard Activity and Access & Control Profiles represent important information to be elicited under any set of proposed WID guidelines, it is <u>essential</u> that they be linked: the key questions of "who works" and "who benefits" must be explored in tandem.

Despite this caveat, the four dimensions proposed in the Harvard paper represent a solid point of departure for any future LAC WID guidelines. In fact, the Harvard framework (clarified and expanded) makes a fine foundation for the job.

Copies of the Activity Profile (their Table 1) and Access and Control Profile (their Table 2) are included as Appendix B. Although, as mentioned, the Access/Control Profile needs to be related to the Activity Profile, it does make two important contributions which should be retained in any future LAC guidelines. First, it differentiates between access and control. A group may be granted access to certain resources but may lack the power to control them. And it is precisely the latter dimension - male/female patterns of control over resources - that may be the least explored yet most critical for WID integration. Second, the Access/Control Profile differentiates between resources and the benefits derived from the mobilization of those resources. Do, for example, females merely use the resources or do they also reap benefits therefrom?

Their distinction between resources and benefits thus calls for two further dimensions of analysis proposed in the Dixon and WAND documents discussed below. First, it is important to distinguish between absolute and relative levels of resources/benefits. If, for example, females gain an average of 10% in income but males' income doubles, females' absolute income position has improved while their relative income has shrunk. My research indicates that information on relative distribution of benefits is less likely to be gathered but of greater importance for WID success. Second, information on distribution of resources/benefits is needed both within and beyond the household. Among the strongest and most consistent findings of WID research is the fact that households are not monolithic "basic units of analysis." Who contributes what sorts of resources, the extent to which resources are pooled or shared, the kinds of expenditures made by various members, the distribution of benefits - all these vary in different social groups. Hence, analysis of male/female divisions

of labor and rewards within the household is central to successful WID integration. These patterns may vary beyond the household as well, by social class, ethnic group, land tenure status, etc. The Harvard approach recommends gathering the basic Activity and Access/Control Profile information separately by class and ethnic group, i.e., "for each of the distinct population groups to whom the project is targeted" (p. 4). This point is echoed to varying degrees in the other documents reviewed here.

The Harvard document also includes a four-page list of questions (see Appendix C) keyed to the four main stages in the project cycle: identification, design, implementation and evaluation. Although these are focused on females only (as opposed to the sex-disaggregated approach more generally recommended), they include a number of items that should be incorporated in any proposed LAC WID guidelines. Their organizational scheme is as follows:

Women's Dimension in Project Identification
- A. Assessing Women's Needs
- B. Defining General Project Objectives
- C. Identifying Possible Negative Effects

Women's Dimension in Project Design
- A. Project Impact on Women's Activities
- B. Project Impact on Women's Access and Control

Women's Dimension in Project Implementation
- A. Personnel
- B. Organizational Structures
- C. Operations and Logistics
- D. Finances
- E. Flexibility

Women's Dimension in Project Evaluation
- A. Data Requirements
- B. Data Collection and Analysis.

C. The ICRW Approach

In May, 1982, the International Center for Research on Women (ICRW) produced "Elements of Women's Economic Integration: Project Indicators for the World Bank." Despite the fact that it was produced with the needs and procedures

of the World Bank in mind, the document has a great deal to contribute to any future WID indicators for LAC, or, more generally, the Agency for International Development. In terms of coverage, the ICRW document discusses only the phases of project design and implementation. It makes a number of good points that could be usefully applied throughout the project cycle, however.

First, the document distinguishes between project success and WID success. Although this distinction has been made elsewhere in the WID literature, its inclusion in the ICRW document points up the need to provide indicators for both WID and project success in any future guidelines.

A second contribution - perhaps its most valuable for future LAC guidelines purposes - is the presentation of separate lists of constraints affecting female access to project inputs and delivery channels for three specific development sectors. These are credit, shelter, and training, all areas where ICRW has solid field experience. The knowledgeable discussion of barriers to be overcome if females are to be successfully integrated into, say, credit projects serves a doubly useful purpose. On the one hand, it provides a preliminary checklist for any future LAC guidelines affecting that sector. On the other hand, their sector-specific discussions and lists of constraints point up the need for parallel efforts in other development sectors. Note that (1) both the Percy Amendment and AID's WID Policy Paper emphasize females' economic roles, (2) agricultural and rural development projects continue to account for the larger part of the AID assistance budget, (3) it is females' economically productive roles in agriculture and the informal sector that are least visible in national statistics, and hence slighted in development programming, and (4) the problem of women's agricultural/informal sector statistical invisibility seems to be particularly acute for the LAC region (see, e.g., Deere, 1977; Blumberg, 1979; and Wainerman and Recchini de Lattes, 1981).

All these points highlight the critical importance of developing sector-specific guidelines and checklists for LAC females' participation in agriculture and rural development projects. The question of how this is to be done will be discussed below.

A third contribution is the ICRW analysis of the problem of slippage between a design that may successfully integrate women and actual project implementation - which may not carry out its WID plans. They point to three independent factors:

> related to task performance, adaptability of the work plan and institutional qualifications...as affecting the chances that a successful project design will be effectively implemented, providing women in the target population with access to those resources and inputs that will enable them to improve their economic performance and contribute to project objectives (p. 23, emphasis added).

A summary of their discussion of the first two factors merits mention. Concerning task performance, they distinguish task complexity and task familiarity and extract the "lesson learned" that "novel tasks should be simple" (p. 24). They then attribute the failure of many typical "women's programs" to a combination of the complexity and non-familiarity of the sewing, handicrafts, etc. activities promoted and their low economic potential. Others have cogently criticized such stereotyped female projects for their lack of pecuniary prospects, but, to my knowledge, ICRW is unique in its analysis of the dimensions of the tasks themselves.

Their second factor affecting successful WID implementation is the adaptability of the design. Such adaptability is, in turn, dependent on (a) loose scheduling that allows for feedback loops, (b)the existence of contingency plans, and (c) the existence of a reserve fund - with some flexibility in budget categories and timing. Actually, "adaptable designs" are coming into vogue for

mainstream development projects as well. Nevertheless, given the still-emergent state of WID programming, ICRW's emphasis on implementation flexibility should be a useful point to include in any future LAC WID guidelines.*

Their Table 1 ("Factors Influencing Women's Inclusion in World Bank Projects"), which outlines most of the material discussed above, is included here as Appendix D. In addition, it should be noted that they provide (fairly general) indicators for measuring the factors included in their Table 1. These should be consulted prior to the formulation of any future LAC/WID guidelines, as should also their concluding discussion of "lessons learned."

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The last two documents to be discussed under the "institutionally-oriented" category both stress the last phase of the project cycle, evaluation. However, both also provide useful insights and methodologies for incorporating WID concerns throughout the project cycle.

D. Dixon's Assessing the Imact of Development Projects on Women

This is an early landmark in AID efforts to enhance the role of women in development. It was issued in May 1980 as "A.I.D. Program Evaluation Discussion Paper No. 8" in PPC's continuing series and remains the only general discussion of WID in this widely-distributed group of reports. Rather than merely assessing evaluations of "WID-only" projects (her original charge), Dixon broadened her focus to ask: "under what conditions are women least likely to be disadvantaged by development projects, both in absolute terms and relative to men?" (pp. 2-3, emphasis in original). The negative wording of the question, Dixon notes, "is intended as a reminder of the uneven and sometimes disastrous consequences to women" of past development projects and policies (p. 3).

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* The Harvard approach also emphasizes flexibility in project implementation. Moreover, it raises the excellent question of whether there is a management information (monitoring) system to detect unfolding effects on women.

In assessing her sample of 32 projects,* Dixon stressed a number of points which have been echoed in the various documents cited in this report. Among the most significant convergences (i.e., those which will be most relevant for any future LAC WID guidelines) are:

- The importance of economic and income factors in WID efforts (poor women, when asked, tend to identify economic need as their most pressing problem, she finds (p. 25); later she quotes Judith Bruce:"Most rural women express economic needs before others. Why not build on identified self-interest?" (p. 91, emphasis in original, quoting Bruce, 1977:42)).

- The importance of getting sex-disaggregated data "up front" - i.e., during pre-implementation stages.

- The importance of both the sexual division of labor and the sexual division of control of resources.

- The importance of focusing both within and across households.

- The importance of focusing on women's position both in absolute terms and relative to men.

While other facets of her analysis also involve partial convergences with the WID documents discussed in this report, they merit separate mention. For example, she analyzes the 32 projects in terms of three dimensions:

> the extent of women's participation in project decision making, either as project staff or as members of the client group; the extent of women's direct access to project benefits; and the immediate and long-term effects of the project on women's social and economic status (p. 17, emphasis in original).

It can be seen that her three dimensions of female participation dovetail with but expand the four dimensions of the Harvard approach. I have suggested that a modified version of these four dimensions should be fundamental to any future

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* These were culled from the earlier and sketchier analysis of 43 projects by Elliott and Sorsby (1979); 26 of the 32 are "WID-only" - i.e., intended to serve an exclusively female clientele.

LAC WID guidelines. Dixon's dimensions would expand our vision to include females as project decision-makers and to consider both short- and long-term WID implications.

Another contribution to future WID guidelines stems from the framework she constructs for evaluating the distribution of project benefits. Her Table 3 (included here as Appendix E) distinguishes indicators of physical, economic and social wellbeing. She proposes that both direct and distributional effects be assessed, the latter both within and across households. Moreover, her discussion of each of the wellbeing factors provides much useful input for future lists of WID indicators. This is not to say, however, that her list and discussion can be adopted "as is" for the proposed WID guidelines. Clarification will be needed, for example, on the difference between access to, and control over, the resources in question, as stressed in the discussion of the Harvard approach.

A final contribution involves her specification of an appropriate (and low cost) methodology for the collection of WID-related data. After mentioning extant data sources such as national statistics, special interest surveys (e.g., a nutrition study) and ethnographies, she notes a number of the techniques of Rapid Rural Appraisal (RRA) data collection. Although she suggests them only for mid-stream evaluations of the sexual distribution of project benefits, they clearly could be used to provide the gender-disaggregated data "up front" that all the WID analyses referenced above consider the first prerequisite to successful WID integration.

RRA began to emerge in the late 1970's as a method to provide quick, mainly qualitative, relatively cheap, and not-too-dirty data for development project planners. Given the ever-tightening budgetary constraints on devel-

ment projects in general, and the minute size of specifically WID-targeted funds, it would be impossible to implement any suggested future WID LAC guidelines without the use of RRA techniques.

At the heart of RRA is a "triangulation" strategy based on multiple methods, many of them involving group meetings. Dixon proposes (1) special meetings with project workers, personnel in related institutions, and community leaders; (2) direct observation of project operations and settings (e.g., a community meeting, an adult literacy class); (3) group discussions (especially at the sites of service delivery); supplemented by (4) several key informants both from the target population and from project personnel (her recommendation is for female informants, but a gender-disaggregated data collection strategy - which seems preferable - would necessitate talking to key informants of both sexes). She also notes that (5) interviews with samples of households (of both beneficiaries and non-beneficiaries) ultimately will be needed for the evaluation of large projects. Needless to say, even without elaborate random samples, this is the most expensive, and time- and labor-intensive technique. The advantage of prior application of the other RRA techniques is that typical patterns presumably would have emerged from the group and key informant interviews. Thus, fewer questions, focusing more on exceptions, would be asked of the sample respondents.

Dixon's discussion of RRA techniques is insightful and quite useful for future guidelines. I have had personal experience in doing this type of research, at project planning, project design, and early implementation phases. All the projects involved were mainstream efforts, and I had no instructions to consider WID (these missions were done for a UN agency, not AID). My experiences support Dixon's recommendations very strongly. I was literally astounded at how much infor-

mation on both sexes was collected. I was always the lone representative of the donor agency, and I worked with a very small number of (ever-changing) host country nationals. In stays measured in days, we were able to accomplish all of the techniques (save the sample survey) recommended by Dixon and - in the process of accomplishing our non-WID, mainstream objectives - gather much of the data recommended in the approaches summarized above. On one occasion, we found that a proposed integrated rural development project would have to be redesigned because project planners had been unaware that key components fell on the female side of the local division of labor - and it was the husbands who had been targeted for assistance.

In short, any future LAC WID guidelines must consider methodology as well as content.

E. The WAND/Population Council Approach

Methodology is clearly the strong suit of the final institutionally-oriented document to be analyzed, Planning for Women in Rural Development: A Source Book for the Caribbean. The publication stems from a collaborative effort of the Population Council and the Women and Development Unit (WAND) of the University of the West Indies and covers three projects, in Jamaica, Dominica and St. Lucia, respectively. Although the effort emphasized evaluation, its insights and innovations can contribute to WID integration at all phases of the project cycle.

What is methodologically unique about this approach is the development of a policy/user-oriented research strategy on WID that is based on a new kind of team approach. Each of the three participating countries selected the project they wanted to analyze. All were rural development projects, all had experienced difficulties, and all had had minimal prior social analysis.

Each of the three countries formed a research team:

> consisting of at least an analysis/researcher, a representative of the Planning Agency, a representative of the Ministry of Agriculture, a representative of the country-level unit concerned with women's roles in development, and administrative staff from the development project itself (p. i, emphasis in original).

The setting up of these multi-sectoral, multi-disciplinary and inter-agency teams was aimed at establishing working links between various government entities as well as collecting certain types of data on the three projects chosen. If true WID integration is to be achieved, the bureaucratic connections and context may prove as important as the content of the WID-focused research. Hence, given the general success of this collaborative effort, its approach deserves close study by those wishing to formulate LAC WID guidelines.

The three project teams explored a core of common research issues, looking within the household to examine (a) the specific tasks and responsibilities of its members, (b) decision-making within the household, and (c) the distribution of project services to men and women. They also looked beyond the household to explore male/female distribution of project services, and women's decision-making in the project and the community. Thus, their focus encompassed Dixon's three dimensions (male/female distribution of benefits, female participation in/decision-making and overall effects on women). Some data also were collected about differences among women (by age, class, ethnicity and - an emergent category - political affiliation), women's organizational participation, and the differences in project type (e.g., sector-specific vs. integrated rural development), community characteristics (e.g., grass roots tradition of participation), and bureaucratic context (e.g., centralized-decentralized).

In two places, preliminary guidelines for "women-sensitive evaluation" are enumerated. The first set, suggested by consultant Kathleen Staudt, are

to include the following:

- descriptions of women's and men's labour, incomes and responsibilities and how that has changed, both within the context of the household and the community;
- analyses of special needs or constraints of men and women and how that affects project participation;
- sex-disaggregated data on all project outcomes and impacts;
- sex-disaggregated data by household on all project outcomes and impacts;
- assessment of all qualitative changes, not immediately evident or quantifiable (i.e., options, analytical skills, etc.);
- analyses of men's and women's participation in project decision-making;
- conclusions about changes, both absolute (improvement or deterioration for men and women, compared to their previous situation) and relative (narrowed or widened gaps between men and women), at the household and community levels;
- interpretations about why differences occur. (For example, if few women receive credit compared to men, what is it about collateral requirements, procedures, etc. that causes this?) (p. 9, emphasis in original).

A second, much more elaborate, set of guidelines, written by Judith Bruce and Affette McCaw, constitutes Section VI of the document (pp. 100-103). The broadness of its scope is indicated by its major headings:

(i) Information Collection (includes Background Information about Rural Household Operation, Household Survival Strategies, and Relations in Community and with Government)

(ii) Evaluation of Programme Operations (includes Community View of Development Projects; Women's Roles in Development; Extent and Intensiveness of Benefits and Work Burden; Viability of Development Projects; and Pluses, Minuses and Alternative Approaches)

(iii) Programme Development and Participation

(iv) Channeling Information from the Rural Community to Planners

(v) Institutionalizing Planners' Concern with Rural Communities and Women's Roles, and

(vi) Funding/Negotiation with External Donors to Support Rural Communities and Women's Concerns.

Two messages may be extracted from this lengthy presentation of both

guidelines schemes. First, there is a substantial degree of convergence about the information that must be collected if women's roles in development are to be enhanced. But, second, there is no universal "cookbook." Once the question is broadened to "What works best in which settings?" the number of factors to be considered multiplies beyond the reach of a simple set of guidelines.

On a more positive note, the WAND/Population Council document demonstrates another kind of convergence. The methodological techniques utilized to collect data closely parallel those recommended by Dixon. Their "user-oriented" approach involved multiple methods. They examined project documents, interviewed relevant administrators, utilized group interviews, stressed a participatory approach that incorporated grass roots project workers and beneficiaries, and avoided reliance on sophisticated random sample surveys. While their methods clearly involved considerably more time and cost than in a typical Rapid Rural Appraisal, they used their resources in generating the highly pragmatic information called for in RRA - rather than the more academicically oriented data usually associated with well-funded evalutions. Moreover, since the makeup of their team deliberately includes representatives from several interested institutions, it is possible that the costs required for WID-sensitive research could be spread among the participating institutions. Thus, their unique team approach may be useful not only for gathering a basic core of WID-relevant data (using a variety of mainly qualitative methods), but also for solving WID's perennial "bottom line problem." The difficulty of funding social soundness research of any sort seems to be especially intense for research aimed at WID objectives. "WID-only" projects tend to have such minuscule budgets as to make even RRA an unaffordable luxury, and in mainstream projects there has not been a sufficient WID constituency to

underwrite the needed research. Accordingly, an approach that (1) gathers most of its basic core of data on both sexes, and (2) involves a multi-institutional, multi-disciplinary team to do so should have a greater chance of being translated from suggested guidelines to reality.

* * *

Before concluding the analysis of the institutionally-oriented documents, one full convergence and two more partial convergences will be discussed.

The full convergence involves a point stressed in every document analyzed above: the importance of taking female-headed households into account. All the documents allude to the greater invisibility and vulnerability of these increasingly prevalent units. In most of the Caribbean countries and in many of the Latin American nations, de facto rates of female-headed households exceed a fifth of all units. According to Staudt, in the WAND/Population Council volume, "The Caribbean censuses of 1970 report high rates of female headship, hovering around 40%" (p.5). The ICRW document, drawing on their previous work on women-headed households, provides ingenious methods of estimating the proportion of such units in various subgroups. Yet these are the households most likely to fall between the cracks of development assistance. There may be legal difficulties (e.g., only male household heads may be coop members), cultural constraints (e.g., it may be inappropriate for a male extension agent to visit a woman farmer), and the additional barriers erected by these women's generally extreme poverty and excessive workload - and all these factors militate against the incorporation of female household heads and their families in development assistance projects.

Of the two remaining partial convergences, one involves the importance of monitoring project implementation for WID integration, and the other stres-

ses the importance of having appropriate personnel for project implementation.

With respect to monitoring, the ICRW, Harvard and Dixon reports call for some way of keeping track of WID performance during project implementation. Dixon suggests that both project personnel and representatives of client groups monitor male/female access to project goods and services. The Harvard paper links the monitoring system and project flexibility to make mid-stream corrections. Additionally, it asks if women are involved in designating data requirements, and in the collection and interpretation of data. How is all of this to be accomplished? AID has not adopted either the formal Monitoring and Evaluation systems called for by some donor agencies (e.g., the International Fund for Agricultural Development), or the technical "supervision reports" of the World Bank that keep tabs on "nuts and bolts" implementation progress (as mentioned in the ICRW report). The lowest cost and least bureaucraticized solution would seem to combine a process or "formative evaluation" methodology with oversight by some person (or persons) involved in implementation with sufficient sensitivity/interest in the topic to constitute a sort of "WID angel." One sort of process methodology, involving a multi-agency, multi-disciplinary team already has been described in conjunction with the WAND/Population Council document. Other sorts of process methodology, focusing on inputs by the beneficiaries themselves, are described below in the next section. But the issue of appropriate implementation personnel - including the "WID angel" who keeps track of project effects on females - goes beyond the problem of monitoring and merits separate discussion.

In one form or another, all the institutionally-oriented documents examined (including Kaschak) are concerned with both the gender and the appropriateness of project staff vis-a-vis WID concerns. The Harvard document breaks the issue into three dimensions: (a) the WID awareness/sensitivity of the staff, (b) gender distribution (actually, they ask if women beneficiaries are served by

women staff), and (c) WID-relevant skills of the staff. The ICRW document, based on its field experience, cautions that agencies capable of reaching poor women - historically the social welfare-oriented organizations that rely on volunteers to teach domestic skills to low income females - may have insufficient expertise and inappropriately qualified personnel to enhance women's economic roles. Elsewhere, I have suggested that at the levels of project management and AID/U.S. contractor supervision, the gender of the staff may be less important than their WID awareness and sensitivity. (Nevertheless, there still does tend to be a correlation between female gender and possession of such WID concern.) Still, several of the documents mention constraints that may necessitate the use of female grass roots field staff if female project beneficiaries are to be served. In short, the three dimensions proposed in the Harvard paper are analytically and empirically independent.

Accordingly, it is not enough for future guidelines to inquire into the proportions of females among (a) direct beneficiaries, (b) project field staff, and (c) project management/oversight institution. Rather, the qualifications, sensitivity and cultural appropriateness of those in the latter two categories to promote the participation of female beneficiaries (the first category) is at issue. The solution would seem to lie in matching gender- and technically-appropriate personnel at the lower levels with female beneficiaries, while assuring that someone who was "WID sensitive" at the upper levels supervised a monitoring system that (a) updated sex-disaggregated information as needed, and (b) kept close track of implementation of WID-related targets.

In sum, it does seem true that without appropriate and sufficient sex-disaggregated information available for project design, females will likely remain invisible - and incorporated into project activities only if (a) these

happen to fall on the female side of the division of labor, (b) the project actually reaches the very poorest members of the population (as ICRW has found, female economic productivity is higher in the lowest income groups), and/or (c) someone has targeted a social welfare component related to women's domestic roles. Nevertheless, it also seems clear that there are limits to information.

On the one hand, the problem of "slippage" - of women being dealt with in the design, but falling through the cracks during implementation - represents one kind of limit to information. Here, the salient guidelines would involve (a) a constraint analysis of possible barriers to female participation/use of project delivery channels and how these may be overcome, (b) provision of appropriate and WID-aware personnel, as discussed above, and (c) provisions for a WID-sensitive monitoring system, which would be overseen by an appropriate person with the concern and "clout" to keep WID integration on track during implementation.

On the other hand, since development projects generally provide scarce and valuable resources to very needy people, there is the problem of distribution and retention of resources by the least powerful in an area. In most areas, most females fall into the "least powerful" group. This underlines the need to combine information on male/female activities with information on male/female control of resources - and to update this information with data on male/female control of resources affected and/or generated by the project. But it also underlines the need to design projects that realistically permit females to maintain and, hopefully, enhance their absolute and relative resource positions. This is what economic development is supposed to be about, yet seems to be the least frequently realized WID objective. How can this be done - especially in areas with conservative male power structures and resistant husbands and fathers? Some of the answers may be found in the second set of documents analyzed for this report,

those oriented toward small, grass roots development projects. Their focus is generally on the beneficiaries themselves (frequently but not exclusively female), and in their process methodologies and efforts to "help the people help themselves" we might find clues to guidelines that will promote both women's economic enhancement and the development projects themselves.

II. GRASS ROOTS-ORIENTED GUIDANCE MATERIALS

In general, these materials will be reviewed only briefly, since most of the proposed LAC WID guidelines will, in fact, focus on institutionally-oriented matters. Nevertheless, even for large-scale development projects, and large-scale institutions, an examination of the "small is beautiful" approach embodied in the manuals to be discussed below should provide useful insights.

A. Suzanne Kindervatter's Overseas Education Fund Guidebook.

Women Working Together: for Personal, Economic, and Community Development is not only the title of this 1983 training handbook, it is also a good summary description of the thrust of all the manuals and handbooks discussed in this section. Group-building seems to be the most stressed common theme, with different degrees of attention paid to personal, economic, and community development goals in the various publications.

The handbook is aimed at grass roots-level trainers (e.g., project staff at about the promotora level) and local leaders. It presents a series of 18 step-by-step training meetings that cover such topics as group mobilization, community problem solving, and identification of viable income-generating projects.

The handbook grew out of the highly successful 1977-79 OEF project in the barrios of San Jose, Costa Rica. In that project, women gained skills, income-earning activities, self-confidence, and, gradually, approval and respect from

their menfolk. Replications in Thailand (where the female participants also reaped direct income/economic benefits) and Honduras (where the benefits involved women gaining rights to land ownership and access to government services) refined the methodology.

For purposes of the proposed LAC WID guidelines, some of the suggested group meetings might be able to generate highly useful data for the kind of sex-disaggregated RRA study that seems a prerequisite to successful WID integration in Project Papers. They also might be useful for on-going monitoring and evaluation during implementation (especially if there had been no RRA to provide the needed baseline data).

Specifically, "what are the ways people earn money around here," and "what are the kinds of work people do around here" can be investigated in a sex-disaggregated manner - either with the full OEF methodology (teams of 4-5 persons are formed, and they pantomime ways people earn money until a substantial list is created; then more information is elicited via group discussion) - or a more conventional group meeting. The same discussion can reveal the degrees of appropriateness/inappropriateness of each activity for each gender.* It also can reveal local patterns of control of income from these activities, both within and across households. Finally, the same methodology can be used for a "modified time use survey" - one of the recommendations of the ICRW report. Here, one member of the group is asked to volunteer all activities done the previous day, from getting up until going to bed. The others are then asked if their day was similar and additional activities are added to a master list which all can see. By elaborating this technique, the time use patterns of men and women, boys and girls (further broken down by ethnic, land tenure status, and other major "planes of cleavage" of the community, where relevant)

*"Suitable" activities may, of course, also vary by age, class, ethnicity, etc.

can be quickly compiled. The technique could then be adjusted for seasonality, or, in farming areas, the agricultural calendar. Information on location of these various economic activities also could be collected. It should be noted that not all these substantive topics are covered in the Kindervatter handbook. Rather, what emerges is a method for a two-stage group effort.

In the first phase, small teams or individual volunteers provide some of the desired information. In the second phase, group discussion refines and expands the data base. Two caveats about the technique may be noted. First, the extent to which the person gathering the information resorts to the "experiential" techniques such as pantomimes, use of flannelboards with paper cutout figures, game formats, etc. in phase one should be considered an open question. Such participatory techniques may be highly appropriate for group-building purposes when group members are non-literate or without previous organizational experience. But they may be excessive (too "touchie-feelie") when the focus is on rapid data collection. Second, since the more vocal - and locally powerful - participants are likely to dominate the discussion, the composition and sequence of group meetings can affect the results. An initial community-wide meeting, for example, may find few if any women or, say, ethnic minority males, speaking up. Nevertheless, an idea of the extent of agreement/disaggreement, which topics are sensitive, and which subgroups would require subsequent and separate collective meetings (e.g., the women) could be obtained by a skilled interviewer.

In sum, Kindervatter provides additional guidance for the kinds of low-cost RRA data gathering techniques called for in the Dixon (among others) document. It seems appropriate for gathering data on (a) sexual division of labor, (b) sexual division of income/resources from (a), (c) time budget, (d) season-

ality of activities, and (e) location of activities (this could include activities involving seasonal or longer-term migration). Thus, by gathering all these kinds of information in a gender-disaggregated manner, we would have a useful operationalization of the Harvard Activity Profile and Access/Control Profile (with suggested modifications). By expanding the discussion, one could also do a "constraint analysis" of the factors that might inhibit participation in various activities or delivery systems of the project.

B. Manuals for the CIM Appropriate Technology for Rural Women Project

There are two volumes of these manuals, Volume I (already available in both English and Spanish) discusses "Steps in the Development of the Project Methodology," and Volume II (Spanish version available; English version in press) describes "Microprojects in Appropriate Technology." Together, they provide orientation to the highly successful CIM methodology, although neither is as self-contained as the Kindervatter handbook. The Kindervatter handbook provides sufficient detail on how to run the 18 meetings aimed at creating a viable WID working group that a competent field staffer should be able to proceed without further training. The two CIM manuals are not quite as self-guiding (a trainer might be very useful for those wishing to use the manuals to set up appropriate technology projects for rural women). Nevertheless, they provide enough information to be of service in the quest for future LAC WID guidelines. Moreover, the style of the manuals is more project focused, and less devoted to experiential group-building activities (charades, games, etc.).

Significantly, the first organized group activity after the promotora and the community have been chosen is data gathering. Here, Volume I presents a very instructive comparison of two research methodologies, utilized in Bolivia and Ecuador, respectively (summarized in Chart No. 5a, pp. 40-43). The Bolivian research involved a "popular" approach to data collecting, with the community

women's groups joining research technicians and promotoras in carrying out the study. In Ecuador, by contrast, a coordinator prepared the research design, hypotheses, data analysis and reports while a field team of researchers and promoters applied the instruments. Although the advantages and disadvantages of each approach are presented, the manual does not provide examples of questionnaires or data forms. Nor does it discuss the research techniques in sufficient detail to provide additional inputs into the proposed LAC WID guidelines. Fortunately, the forms should be available from the project director (Bambi Eddy de Arrellano), who also should be a major resource for the guidelines project.

Volume II details nine microprojects, and provides fascinating information about the technologies employed in these successful efforts. It does not, however, extract any general "lessons learned" about the do's and don'ts of viable appropriate technology projects. Nor does it provide details on the actual costs or monetary returns of these income-generating efforts. The lack of financial information shadows the abundance of technical information. The manual could not be used "as is" to start another such project without further training in its use and more specification of the economics involved.

All in all, however, the success of the projects and the fact that they have collected data of the sort needed for successful WID integration using many of the methods recommended in the Dixon and WAND/Population Council documents justify further follow-up. It is recommended that Ms. Arrellano be contacted (perhaps by telephone interview). The two volumes of the manual, as well as the CIM project files, contain sufficient nuggets to indicate that future follow-up could uncover a mother lode of useful information for LAC WID guidelines.

C. Navamaga

Sub-titled, "Training Activities for Group Building, Health and Income Generation," this manual is a joint effort of the Women's Bureau of Sri Lanka and the Overseas Education Fund. Its authors are Dian Seslar Svendsen and Sujatha Wijetilleke. The handbook grew out of a successful AID/OEF/Sri Lanka Women's Bureau project that trained about 100 Development Officers (government field workers) to work with women leaders for grass roots community development. It represents the final product of an intensive 20-month field training project and includes over "fifty innovative training activities that enable women's and mixed groups to work together to carry out health and income generation projects" (p. 3). This 1983 volume is quite similar in approach to the Kindervatter volume (an earlier version of which is cited). However, it provides an even heavier dose of experiential training games and activities while paying less attention to obtaining basic data. (Interestingly, it adapts the pantomime-followed-by-discussion format used in the Kindervatter volume to delineate women's work and possible new income-producing activities.) There is an informal health needs survey described, which uses the female group members to gather impressionistic data on population, nutrition, land and food, and health. But there is much less concern with collecting even project-relevant socio-economic information than in the CIM approach.

Conversely, there is more attention paid to the economics of the micro-projects described in the book than is the case in the CIM manual. One of the exercises attempts to ascertain the existence of a market (for a beekeeping project, but can be generalized; p. 100). Another section of the volume (beginning on p. 150) gives a series of check lists and forms for ascertaining costs, and profit/loss worksheets. These are simple enough to be of possible use in on-going

evaluations using a formative methodology. In this way, beneficiaries themselves could monitor the economic well-being of the small projects that remain the most frequent operationalization of "WID concerns" in AID projects. Other than these financial forms, the level of detail about income-generating projects is much less than in the CIM manuals. In sum, the methodology overlaps with the Kindervatter, the income-generating projects overlap with the CIM, but the marketing and accounting checklists and worksheets could prove of possible use in a future LAC WID guidelines project.

D. Movilizando la Mujer

The sub-title of this loose-leaf notebook on "Mobilizing the Woman" translates as "the how, with whom,why and for what of a project." Produced by the International Women's Tribune Center, Inc. in 1980, the manual is divided into four sections. The first, identification of needs, begins with a series of questions to be answered as a group project by participants. These encompass education, health, housing, organizations, the economy, income data, life and customs (language, religion, festivals, means of communication, daily life of a man and of a woman), and "basic information" (population, climate, location, infrastructure). The net result should be a portrait of the community. A definite plus is the inclusion of sample forms for compiling this information: a summary of the community profile on p. 19, and a time budget, "a day in the life of a woman," on pp. 23-24. The latter is broken down by the same set of categories used in the community profile. Unfortunately, it is less than clear just how useful it would be to classify a woman's time in terms of amount spent on health, "basic information," and several of their other categories.

Following the community portrait, the manual guides participants to identify local leaders and organizations and subjectively compare male and female status in the community. The two remaining sub-parts of the identification of

needs section present conventional and participatory research methodology. The former deals with such topics as formulating questions, administering the questionnaire or interview, and summarizing the data. Once again, forms and examples are provided: of a data summary from a survey (p. 60), of a questionnaire appropriate for rural agricultural community members (p. 64), and of a questionnaire on household decision-making patterns and aspirations/perceptions of change (p. 66(a)). While useful, none of these examples can be considered definitive for their area of coverage. Nevertheless, they deserve another look as part of any future WID guidelines project. (The material on participatory research is interesting and well-detailed, but unlikely to be of use in an institutionally-focused WID guidelines effort; rather, their value seems to be more in the sphere of people development than data development.)

The second section of the handbook goes through all the phases of project design (defining the problem, establishing objectives - examples are given on a worksheet on p. 122, designing strategies - two project chronograms are given on pp. 147-148, and formulating the monitoring and evaluation). The participatory emphasis, and the stress on involving the woman, make it interesting and potentially useful reading for a WID guidelines project. Realistically, however, AID projects are rarely designed in this "bottom up" fashion.

The third section deals with resources - human, informational, material and financial - needed in order to carry out the project designed in the previous section. Once again, several useful examples and worksheets are included (e.g., how to make a project budget, p. 285).

The final section consists of a single page - a notebook divider labeled, "my project." The relevant question at this point is: who is "my"? The handbook provides a good deal of detail, and many exercises, that would seem aimed

at a group of village women hoping to create their own donor-financed development project. But is such a handbook written at a realistic level for the average Latin American village woman? A more probable audience would be the grass roots-focused women's organizations that mount many of the "WID-only" projects discussed, and frequently criticized, in the institutionally-oriented documents analyzed in Part I of this paper.

Regardless of audience, this manual, despite the strengths mentioned above, illustrates the pitfalls of the "Do it yourself on a shoestring" approach to integrating women in development. Its focus is on process, not substantive content. Thus, the manual guides the hypothetical group of village women through a "felt needs" assessment and into data collecting, project design and look-for-resources phases - without attention to the economic issues that will make or break the projects these women may formulate. For example, using this manual, a group of women guided by well-meaning volunteers from a social welfare-oriented national women's organization, might decide on some sort of sewing/handicrafts project. It sounds so logical: the village women need money, the volunteer women are willing to teach them sewing/handicrafts techniques, and somewhere out there is an organization willing to donate some funds to a worthy cause. But is there a market? What are the costs, the expected rate of return? Ironically, Movilizando la Mujer is an example of a good handbook that may (unintentionally) lead to bad projects. There is, of course, a place for social welfare projects. But that place is not in substitution for true integration of women into economic development. In sum, Movilizando la Mujer offers a useful "cookbook" - but the menu needs a price list before it can offer much guidance for the proposed LAC WID handbook.

E. Caribbean Resource Kit for Women

This 1982 manual is another publication of the International Women's

Tribune Center, Inc., this time in collaboration with WAND/University of the West Indies. Once again, the loose-leaf format is used - which does seem a good idea for any handbook aimed at practitioners. In fact, a recommendation to this effect would seem modestly useful for LAC WID guidelines. The resource kit is divided into four sections. The first, "country profiles," gives a minimum of data about each country (its area, population, economy, and a few statistics concerning its females), followed by what appears to be an exhaustive list of its women's organizations (its Women's Desk, and umbrella, church, political, professional and service groups). The second section, "activities and resources," contains the following categories: agriculture, appropriate technology, education, health, small business. Under each, there are detailed summaries of women-oriented projects, training, and bibliography. The third section lists regional organizations with a WID-slant, and a regional bibliography on Caribbean women. The final section, "financial and technical assistance," lists ideas on financing, provides sample proposal formats, sample budgets, and possible funding sources. The audience for this handbook is the Caribbean "women in development community" - i.e., those professionally interested in WID projects in the region. It could, however, also prove useful to AID project designers for the Caribbean, and some of the information goes beyond a "WID-only" focus. For example, in the bibliographic materials on appropriate technology, a reference is given for the highly-regarded but elusive manual on appropriate technology/rural development issued by the Melanesian Council of Churches, Liklik Buk.

In sum, should the future LAC WID guidelines project expand in the direction of listing relevant projects, organizations and bibliography, this handbook should prove useful.

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OUTLINE

Design Guide for Integrating Women into National Development

I. Objective:

A. Develop design guide for field staff for integrating women into national development.

B. Governing principle of objective

Technical excellence in gathering and analyzing data to identify target population(s) and formulate programs and design projects with maximum possible impact.

C. To achieve excellence - guidelines must facilitate data collection and program/project design which reflect accurately social, cultural, and economic realities, i.e., flexibility.

II. Strategy:

A. Refocus unit and perspective of analysis

1. Primary socioeconomic unit - focus of both analysis and assistance.

2. Reduce tacit perception of planning for males.

3. In planning and implementing = draw women forward to positions which coincide with culturally defined realities.

B. Refocused unit of analysis - coincident w/extant programming cycle - i.e., at each phase the unit of analysis becomes basic socioeconomic unit, rather than male and/or female bias. Examples:

1. CDSS

(a) Who are poor?)

(b) What are they like - in ethnic, economic, geographic terms?)

(c) What is poverty like?)

New unit of analysis will facilitate description, analysis of roles of all involved - men, women, children.

(d) Degree of access to social services and vital resources.

(e) Social system - cleavages and cohesion/

2. Sector assessment

(a) What are existing systems, institutions - formal (e.g., co-ops), informal (kin-based reciprocal work groups) functioning in sector?

(b) What are major trends (e.g., migration, commercialization, land reform, demographic increases)?

(c) Sector specific conditions of target population (e.g., literacy, school drop and retention, nutritional status, morbidity, mortality, land tenure, technology level).

(d) Major actors within sector

-- within target population

-- within delivery system institution

(e) Real and/or potential constraints in sector

If done with refocused unit of analysis, then -

(a) Sector specific status - male, female, children - identified.

(b) Actors and institutions - composition by sex and age identified.

— within target group

— within delivery system

(c) Roles of actors - by sex, age identified

(d) Major constraints - identified

(e) Feasible programming areas - identified.

3. PID

(a) Preliminary prediction of social impact.

(b) Identification of beneficiaries.

(1) Primary

(2) Secondary

(c) Benefits - what, to whom?

(d) Preliminary identification of project specific constraints and feasibility - within target group and within delivery system.

If done with refocused unit of analysis, then -

(a) Beneficiaries (primary and secondary) by age, sex, ethnicity, etc., will be identified.

(b) Estimated benefits.

(c) Constraints and preliminary formation of strategies.

4. PP

(a) Critical types or groups of people to whom project must be acceptable.

(b) Changes in behavior, beliefs required.

(c) Incentives needed.

(d) Education training needed

(e) Constraints to making required changes - feasibility.

(f) Participation required and indigenous ways to channel it.

(g) Equitable distribution of benefits.

If done with refocused unit of analysis then -

(a) Critical groups: men, women, family, community, etc., will be taken into account.

(b) Changes in behavior required: of whom, by age, sex, and sociocultural level identified?

(c) Incentives needed: what, to whom?

(d) Training needed: what, to whom?

(e) Constraints identified

(f) Participation: who and how?

(g) Distribution of benefits: to whom - equitable?

III. Methodology

A. Standard data gathering and analysis tools

1. Literature reviews

2. Surveys

3. Case studies

4. Participant observations, case histories, situational analyses, etc. - all done from perspective of refocused unit of analysis.

B. Analysis of Institution from Social Perspective

1. Composition of staff by sex, profession, ethnicity

2. Degree to which composition coincides with target population

3. Disposition of institution and staff to collaborate with target population.

C. Design workshops

1. Purpose: explain refocused unit of analysis; demonstrate data gathering techniques

2. Audience: mission staff and counterparts

LAC/DR:WGKaschak:ash:10/27/78

Table 1

ACTIVITY PROFILE

Socioeconomic Activity	Gender/Age[1] FA	MA	FC	MC	FE	ME	TIME[2]	LOCUS[3]
I. Production of Goods and Services								
a. Product/Services								
1. Functional Activity								
2. Functional Activity								
3. Functional Activity								
b. Product/Services								
1. Functional Activity								
2. Functional Activity								
3. Functional Activity								
2. Reproduction & Maintenance of Human Resources								
a. Product/Services								
1. Functional Activity								
2.								
3.								
b. Product/Services								
1. Functional Activity								
2.								
3.								

Code: 1/ FA = Female Adult; MA = Male Adult; FC = Female Child; MC = Male Child; FE = Female Elder; ME = Male Elder
2/ Percentage of time allocated to each activity; seasonal; daily
3/ Within home; family, field or shop; local community; beyond community

Table 2

ACCESS AND CONTROL PROFILE

RESOURCES	ACCESS (M/F)	CONTROL (M/F)
Land		
Equipment		
Labour		
Production		
Reproduction		
Capital		
Education/Training		

BENEFITS	ACCESS (M/F)	CONTROL (M/F)
Outside Income		
Assets Ownership		
In-Kind goods (Food, clothing, shelter, etc.)		
Education		
Political Power/Prestige		
Other		

ANNEX 1

The following sets of questions are the key ones for each of the four main stages in the project cycle; identification, design, implementation, evaluation.

WOMEN'S DIMENSION IN PROJECT IDENTIFICATION

A. ASSESSING WOMEN'S NEEDS

1. What needs and opportunities exist for increasing women's productivity and/or production?
2. What needs and opportunities exist for increasing women's access to and control of resources?
3. What needs and opportunities exist for increasing women's access to and control of benefits?
4. How do these needs and opportunities relate to the country's other general and sectoral development needs and opportunities?
5. Have women been directly consulted in identifying such needs and opportunities?

B. DEFINING GENERAL PROJECT OBJECTIVES

1. Are project objectives explicitly related to women's needs?
2. Do these objectives adequately reflect women's needs?
3. Have women participated in setting those objectives?
4. Have there been any earlier efforts?
5. How has present proposal built on earlier activity?

C. IDENTIFYING POSSIBLE NEGATIVE EFFECTS

1. Might the project reduce women's access to or control of resources and benefits?
2. Might it adversely affect women's situation in some other way?
3. What will be the effects on women in the short and longer run?

WOMEN'S DIMENSION IN PROJECT DESIGN

A. PROJECT IMPACT ON WOMEN'S ACTIVITIES

1. Which of these activities (production, reproduction & maintenance, sociopolitical) does the project affect?

2. Is the planned component consistent with the current gender denomination for the activity?

3. If it plans to change the women's performance of that activity, is this feasible and what positive or negative effects would it have on women?

4. If it does not change it, is this a missed opportunity for women's roles in the development process?

5. If it plans to change the activity locus of that activity, is this feasible, and what positive or negative effects would it have on women?

6. If it does not change it, is this a missed opportunity for women's role in the development process?

7. If it plans to change the renumerative mode of that activity, is this feasible, and what positive or negative effects would it have on women?

8. If it does not change it, is this a missed opportunity for women's role in the development process?

9. If it plans to change the technology mode of that activity, is this feasible, and what positive or negative effects would it have on women?

10. If it does not change it, is this a missed opportunity for women's role in the development process?

11. How can the project design be adjusted to increase the above-mentioned positive effects, and reduce or eliminate the negative ones?

B. PROJECT IMPACT ON WOMEN'S ACCESS AND CONTROL

1. How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the production of goods and services?

2. How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the reproduction and maintenance of the human resources.

3. How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the sociopolitical functions?

4. What forces have been set into motion to induce further

exploration of constraints and possible improvements?

5. How can the project design be adjusted to increase women's access to and control of resources and benefits?

WOMEN'S DIMENSION IN PROJECT IMPLEMENTATION

A. PERSONNEL

1. Are project personnel sufficiently aware of and sympathetic toward women's needs?

2. Are women used to deliver the goods or services to women beneficiaries?

3. Do personnel have the necessary skills to provide any special inputs required by women?

4. What training techniques will be used to develop delivery system?

5. Are there appropriate opportunities for women participation in project management positions?

B. ORGANIZATIONAL STRUCTURES

1. Does the organizational form enhance women's access to resources?

2. Does the organization have adequate power to obtain resources needed by women from other organizations?

3. Does the organization have the institutional capability to support and protect women during the change process?

C. OPERATIONS AND LOGISTICS

1. Are the organization's delivery channels accessible to women in terms of personnel, location and timing?

2. Do control procedures exist to ensure dependable delivery of the goods and services?

3. Are there mechanisms to ensure that the project resources or benefits are not usurped by males?

D. FINANCES

1. Do funding mechanisms exist to ensure program continuity?

2. Are funding levels adequate for proposed tasks?

3. Is preferential access to resources by males avoided?

4. Is it possible to trace funds for women from allocation to delivery with a fair degree of accuracy?

E. FLEXIBILITY

1. Does the project have a management information system which will allow it to detect the effects of the operation on women?

2. Does the organization have enough flexibility to adapt its structures and operations to meet the changing or new-found situations of women?

WOMEN'S DIMENSION IN PROJECT EVALUATION

A. DATA REQUIREMENTS

1. Does the project's monitoring and evaluation system explicitly measure the project's effects on women?

2. Does it also collect data to update the Activity Analysis and the Women's Access and Control Analysis?

3. Are women involved in designating the data requirements?

B. DATA COLLECTION AND ANALYSIS

1. Are the data collected with sufficient frequency so that necessary project adjustments could be made during the project?

2. Are the data fed back to project personnel and beneficiaries in an understandable form and on a timely basis to allow project adjustments?

3. Are women involved in the collection and interpretation of data?

4. Are data analyzed so as to provide guidance to the design of other projects?

5. Are key areas for WID research identified?

TABLE 1: FACTORS INFLUENCING WOMEN'S INCLUSION IN WORLD BANK PROJECTS

PROJECT PHASE	FACTORS	ELEMENTS
Design Phase	Intersection of Women's Productive Activities and Project Objectives	Women's Productive Activities: -place of work; -economic sector; -formal or informal labor markets; -activities in which women are concentrated; -economic needs and responsibilities of poor women. Project Objectives: -whether they are production oriented; -whether they are designed to reach the poorest in the target population.
	Constraints in Access to Project Inputs and Delivery Channels	Credit: -information and disbursement networks; -transaction costs; -collateral requirements and history of credit worthiness; -size of disbursements and flexibility of repayment schedules. Shelter: -site location in relation to place of work; -levels of services offered; -capacity of design to maintain informal social support networks; -selection criteria excluding very low incomes and based on ideal family types. Training: -eligibility criteria based on formal education requirements; -implicit exclusion from target population; -information dissemination systems and selection mechanisms; -physical mobility requirements.
Implementation Phase	Factors Related to Task Performance	Task Complexity, Including the Number of Tasks Women Must Perform; Task Familiarity.
	Adaptability in Implementation	Scheduling of Project Interventions; Alternative Courses of Action; Availability of Reserve Funds.
	Institutional Mechanisms and Human Resources	Technical Competence; Managerial Competence; Outreach Capabilities.

TABLE 3

FRAMEWORK FOR EVALUATING THE DISTRIBUTION OF PROJECT BENEFITS

Resources that determine	Direct effects on primary beneficiaries[a/]	Distributional effects	
		within households	across households
Physical wellbeing			
1. food, water, fuel			
2. housing			
3. environmental quality			
4. medical care			
5. personal safety			
6. rest and leisure			
Economic wellbeing			
7. income/cost of living			
8. credit			
9. land and water			
10. technology			
11. other assets/debts			
Social wellbeing			
12. knowledge			
13. power			
14. prestige			

a/ Primary beneficiaries or target populations may be defined as classes of individuals, of households, or of localities.

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