

PN-ABW-717

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**GENESYS**

***Gender and Sustainable  
Development:  
A Training Manual***



**United States Agency for  
International Development  
Office of Women in Development**

PN-ABW-717

***Gender and Sustainable  
Development:  
A Training Manual***

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*“USAID will pay special attention to the role of women. In much of the world, women and girls are disproportionately poor, ill, and exploited. Of necessity, the development process must focus on their social, political, and economic empowerment. We will integrate the needs and participation of women into development programs and into the societal changes those programs are designed to achieve. Women represent an enormous source of untapped talent, especially in developing nations. The success of women - as workers, food producers, health providers and teachers of their children, as managers of natural resources, and as participants in a democratic society - is essential to successful development. A development process that fails to involve half of society is inherently unsustainable.”*

*Strategies for Sustainable Development  
U.S. Agency for International Development  
March 1994*

### Acknowledgments

Any project that involves training demands a high performing team. This manual is the result of the collaborative efforts of such a team. Without the experience, concern, and commitment of the team members, this manual would not have been possible. Rosalie Hulsinga Norem, of the U.S. Agency for International Development's Office of Women in Development, developed the concepts and tools for contextual gender analysis and was a tireless contributor. The efforts of the Management Systems International staff, Edward J. Comstock, Marina Fanning, Gloria Fauth, Joan Goodin, Drew Lent and Dian Seslar Svendsen, each of whom made substantial contributions to this work, were essential to its final completion.

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## INTRODUCTION TO THE MANUAL

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The publication of this training manual represents in part the "lessons learned" from the GENESYS Project's five years of experience in gender and development training with the United States Agency for International Development (USAID). Principal among these lessons is that gender and development training best achieves its institutional capacity-building objectives when it logically and deliberately links...

- ✓ the strategic program goals and objectives of the organization undergoing the training with its gender and development objectives;
- ✓ the purposes and objectives of the development projects that the organization supports with a time-tested gender analysis method;
- ✓ sound development planning processes with the organization's chosen planning framework (e.g., the logical framework); and,
- ✓ proven and effective analytical techniques with planning, implementing, monitoring and evaluating development programs and projects (e.g., force field analysis).

The workshop described in this manual was designed for use in a series of workshops conducted for USAID contractors in each of four priority areas: Democracy and Governance, Environment, Economic Growth, and Population and Health. These workshops aimed at increasing project success -- i.e., development characterized as effective, equitable, and sustainable -- by incorporating gender analysis into development planning, and applying the results of this analysis to the project cycle -- i.e., logical frameworks, work plans, and monitoring and evaluation designs. Although written for USAID and its counterparts, this manual illustrates the universality of the aforementioned gender and development training principles and is meant to be a dynamic document. We encourage our readers to "cut and paste" its contents to meet their specific gender training needs.

## HOW TO USE THE MANUAL

This manual provides detailed guidelines for conducting a 3 day workshop on integrating gender analysis into project planning in the United States Agency for International Development's (USAID) key areas of program concentration -- population and health, broad-based economic growth, environment, and democracy. It may also be used for a one or two day workshop. It is a dynamic tool, meant to be adapted and changed to fit the needs and experience of development professionals and the projects being addressed. The manual has been designed primarily for use by USAID program and project management staff and counterparts (e.g., contractors, PVO/NGO personnel, and host country government officials). While it can be used with groups of any size, 25-35 is an ideal number of participants. The manual presumes that those conducting the workshop have training and facilitating skills, as well as a grounding in gender issues. Ideally, a skilled facilitator would co-train with a sectoral gender specialist to insure coverage of the workshop's primary training demands -- facilitation, gender issues, and technical expertise.

Workshops based on this manual will increase participants' awareness of the importance of considering gender in planning and implementing projects, and provide a tool for conducting such analyses.

The training manual designers initially considered developing four manuals --treating each of USAID's four key areas of program concentration separately; but, as the manuals would share much common content, they decided to develop this one "standard" manual and include guidelines and hints for adapting it to fit each of the four<sup>1</sup>. The following ideas will help you to effectively use this manual to plan and facilitate tailored workshops.

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### Pre-Training Design Checklist

- ✓ Review the manual to see what is included.
- ✓ Carefully read the workshop objectives on page 11.
- ✓ Determine potential participants' needs related to gender and [KEY AREA].
- ✓ Collaborate with others to plan the workshop.
- ✓ Determine whether a 3, 2, or 1 day workshop is feasible and needed. (Consider experience of participants with gender issues, particularly as they relate to this priority area; time available; and participants' other responsibilities.)

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<sup>1</sup> The term [KEY AREA] is used throughout to indicate where trainers should insert references to program concentration. A fifth key area, Human Capacity Building, had not been defined when the manual was designed.

- 
- ✓ Decide what sessions to include.
  - ✓ Determine dates.
  - ✓ Identify appropriate facilities for holding workshop.
  - ✓ Proceed with logistics such as inviting participants.
  - ✓ Select projects to be used as cases in the workshop.
  - ✓ Invite representatives of selected projects to prepare brief presentations. Provide necessary guidelines.
- 

As your overview of the manual will reveal, it provides detailed guidelines for each session as well as information on:

**WORKSHOP METHODOLOGY**

**ROLE OF A FACILITATOR**

**FACILITATION HINTS**

**WORKSHOP SET-UP**

**KEY INFORMATION AND USE OF VISUAL AIDS**

**PRE-WORKSHOP BACKGROUND MATERIALS**

**SELECTING PROJECTS**

**ADAPTING THE WORKSHOP**

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## **WORKSHOP METHODOLOGY**

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Following principles of "participation", the workshop combines information presentation with experiential approaches to learning. Workshop designers have opted for interaction over presentation in areas where participants have relevant experience to contribute. Such a workshop approach will help to strengthen participant ownership of these constructs, strategies, and methods.

The manual reflects an experiential learning model which enables participants to draw heavily upon their own experience and expertise. This model enables participants to **experience** that which is to be learned, **reflect** on their learning, **generalize**, and **apply** the learning to other situations. This approach to learning is used because research has shown it to be an effective method for adult learning. Explain the experiential learning cycle to the participants if necessary, and particularly if they are accustomed to less learner-centered methods.

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## **ROLE OF A FACILITATOR**

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A facilitator is not a lecturer. Rather, a facilitator helps to move along a learning process whereby participants interact with each other, gain new

information, and build upon their experience. The facilitator at times presents new information, but his or her key role is to help the group experience and learn together. Explain the role of the facilitator to the group if this concept is new.

*A good facilitator. . .*

- ✓ Keeps the group focused on task and process
- ✓ Remains neutral
- ✓ Is an informed guide helping the group to chart its course and accomplish its goals
- ✓ Listens more than talks
- ✓ Encourages everyone to participate while remembering that individuals participate in different ways. Some may talk only in small groups, but are still participating. Others may wish to talk constantly and may be contributing little
- ✓ Protects members of the group from attack by others
- ✓ Helps keep group within time constraints
- ✓ Energizes a group or slows it down, as needed
- ✓ Recaps, occasionally, what has happened in the workshop and helps group to make connections between the sessions

*More Facilitation Hints. . .*

- ❖ Don't do the group's work. Learning is more effective and lasting if the individuals and small groups discover on their own.
- ❖ Spend sufficient time with each group during small group work to be certain they have grasped the tasks and concepts supporting it.
- ❖ Be alert to signs of confusion (asking neighbors questions, puzzled or frustrated looks, resistance, etc.).
- ❖ If several individuals or groups are having trouble, review portions of the workshop which are causing confusion.
- ❖ Ask frequently if there are questions. Sometimes the session specifically suggests asking if there are questions, but you should ask even if the session doesn't specify doing so.
- ❖ When you DO ask a question, allow group members time to think before answering. To make sure you allow time, silently slowly count to 10. Silence may seem uncomfortable, but is essential if you want thoughtful answers. It also sends the message to group members that you really ARE interested in their responses.

- ❖ Don't feel you must be the expert. Remind the group and yourself that you are a facilitator. Remind them (and perhaps yourself) of THEIR expertise and experience. One way to do this is to toss questions back to them. Such as, "That's an interesting question, Linda. What do you think, Jacob?"
- ❖ Take at least two 15-20 minute breaks, one in the afternoon and one in the morning. Suggest short "stretch breaks" as needed.
- ❖ Be flexible. This manual is intended to guide, not dictate. Times of the sessions as well as depth and breadth of content should remain flexible. If participants are already familiar with aspects of the workshop, eliminate those aspects, or simply review them. Use your judgment, too, and your perceptions of the group's energy, interest, and comprehension to decide when to lengthen or shorten sessions.
- ❖ Finally, *relax* and *enjoy* the workshop!

## WORKSHOP SET-UP

If possible, avoid having chairs in rows and hold the workshop in a place which allows participants to sit at several small tables, or in a horseshoe or semi-circle arrangement. This will encourage interaction and ease group break-out sessions.

The following materials should be supplied for *all* sessions. They are *not* listed repeatedly under each session's MATERIALS section:

- ✓ markers
- ✓ flip chart pads
- ✓ tape
- ✓ flip chart easels (one for each prospective work group, if possible)
- ✓ overhead projector (if using transparencies; the workshop can also be done using *only* flip chart paper and markers)

## KEY INFORMATION AND USE OF VISUAL AIDS

In most session guidelines, some information will be recommended for the prepared flip chart (so that facilitators and participants can refer to it throughout the workshop); whereas other prepared information may be posted on flip chart paper OR presented in an overhead, according to the facilitator's style. Throughout this manual, prepared flip charts are shown in portrait format, with overheads in landscape. A packet of prepared flip chart masters is included as Appendix A; overhead transparencies are included as Appendix B; and handouts, forms and worksheets in Appendix C. The flip charts and overheads are meant

to convey the necessary information in the least amount of space. Therefore, facilitators are encouraged to simplify and adapt them to their needs.

Within most session guidelines, some information is highlighted in *bold italics*. This information is important for workshop content or process and should be written on flip chart paper.

If group task instructions are written on flip chart paper, they can be posted throughout the session for reference. Also, any visuals which integrate several sessions or will be referred to throughout the workshop, such as "USAID's Approach to Development" (Session II), "Contextual Analysis Summary Sheet" (Session V), should also appear on flip charts so that they, too, can remain posted.

## **PRE-WORKSHOP BACKGROUND MATERIALS**

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Prior to the workshop, each participant should receive the following articles/papers with a suggestion that he/she read them in preparation for the workshop. This will save time as session guidelines presume participants have done some background reading.

### ***For Workshops on ALL Key Areas***

USAID. Strategies for Sustainable Development. Washington, DC: USAID, (March 1994)

Atwood, J. Brian. Statement of Principles on Participatory Development. Washington, DC: USAID, (November 1993)

USAID. Gender and Development. Office of Women in Development. Washington, DC: USAID. (September 1994)

USAID. Implementation Guidelines. . Washington, DC: USAID, (May 1994)

USAID. Addressing the Needs of Women and Girls: Highlights of USAID's Approach. Office of Women in Development. Washington, DC: USAID. (July 1994)

### ***Democracy and Governance***

Goodin, J. Democratic Revolution or Revolutionary Democracy?: A review of current thinking. Washington, DC: USAID. (November 1993)

USAID. Implementation Guidelines, Technical Annex C: Democracy. Washington, DC: USAID. (July 1994)

### ***Environment***

USAID. Implementation Guidelines, Technical Annex B: Environment. Washington, DC: USAID. (July 1994)

### ***Economic Growth***

USAID. Implementation Guidelines, Technical Annex D: Economic Growth. Washington, DC: USAID. (July 1994)

### ***Population and Health***

USAID. Implementation Guidelines, Technical Annex A: Population Health and Nutrition -- Enabling Informed Choices and Effective Action. Washington, DC: USAID. (July 1994)

These articles and papers are available upon request from:

Office of Women in Development  
Bureau for Global Programs, Field Support and Research  
USAID  
Room 714, SA-18  
Washington, D.C. 20523-1816  
Telephone: 703-875-4668  
Fax: 703-875-4633

If the facilitator is not familiar with USAID's [KEY AREA] strategy and USAID's approach to gender and development, he/she should read these, and additional materials, to provide sufficient background for facilitating the workshop.

## **GUIDELINES FOR SELECTING PROJECTS**

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Participants will be applying their gender analysis learning to real projects represented by the workshop participants. As such, it is *crucial* to the success of the workshop that participants send ahead documentation for projects that are currently part of their "in-basket" -- i.e., those they are working on regardless of their stage in the project cycle. In the invitation letter to the workshop, participants should be instructed to do this. Project papers, project logical frameworks, annual work plans, relevant scopes of work, and monitoring and evaluation designs are all important. Financial information, delicate as it is, should be left at "home," but *all* other relevant information should be brought along. If several participants are from the same project team, ask them to get together before the workshop and decide what documentation they'll send, and who will send it.

## **ADAPTING THE WORKSHOP**

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### ***USAID's Four Priority Areas***

Workshop sessions marked with a ✂ require some adaptation, usually minimal, to fit the priority area being addressed. As you are reading through an activity in planning for your workshop, you will occasionally see [KEY AREA] inserted in the text. This is a cue to insert the title of the program concentration area you are addressing. Often, by substituting small changes in the wording, a given activity can be used for any of the four workshops.

### ***Alternative Agendas***

The workshop, as presented in this manual, will take approximately 18-19 hours (depending on group size and experience), not including lunch and breaks, or 2½ to 3 days. The following suggested agenda may help you adapt the manual to design a workshop which fits your participants' needs.

By excluding certain sessions, however, the workshop could be adapted to a one or two day schedule. The shorter versions may not be as effective as the full workshop, but circumstances such as time constraints or prior experience with the topic may necessitate a shorter duration. Please see Appendix D for examples of these schedules.

### **THREE DAY WORKSHOP**

#### **Day One:**

Introduction to the Workshop 1½ hours

break

Setting the Context 1 hour

Determining Correlates to USAID's Key Areas ½ hour

Introduction to Gender Analysis:  
WID's Historical Path in USAID ½ hour

lunch

Gender Analysis:  
Contextual Analysis of Gender  
and Social and Economic Issues 3 hours

#### **Day Two:**

Gender Analysis: Practical Applications 3½ hours

lunch

Implementation Planning: Part I 3-4 hours

**Day Three:**

**Implementation Planning: Part II** 1½-2 hours

**Determining Inputs** 1½ hours

lunch

**Next Steps: Personal Action Plans** 1 hour

**Workshop Closing and Feedback** ½ hour

# SESSION I

## INTRODUCTION TO THE WORKSHOP

---

### **PURPOSE**

To introduce participants to the workshop and each other and allow them to express their expectations; review workshop goal, objectives and norms; and set workshop agenda.

### **MATERIALS**

Handouts: Workshop Objectives

Project Packets (relevant, condensed project information)

Prepared flip chart paper or transparencies (see Steps 7, 8, & 9)

### **PREPARATION**

Duplicate handouts (one per participant)

Prepare newsprint or transparencies (see Steps 7, 8, & 9)

### **TIME**

1 1/2 hours

<p>FACILITATOR NOTE: Prior to the workshop, facilitators and workshop organizers should select 2 or 3 projects which will be used instead of case studies throughout the workshop. See GUIDELINES FOR SELECTING PROJECTS on page 7 of this manual.</p>
--

### **PROCESS**

1. Welcome participants to the workshop and explain the purpose. Also explain your role -- the role of the facilitator -- if necessary (see page 3).
2. Next, ask participants to think about two things. First, what contributions they can make to the workshop in terms of their interests, experience, and expertise. Ask, secondly, what they expect from this workshop. Ask them to briefly note their thoughts on these points. Allow 5 minutes.
3. Next, ask them to form pairs and interview one another about what they have written. Explain that at the end of 10 minutes they will be asked to give a 2-minute introduction of their partner stating one special contribution their partner brings to the workshop and the partner's expectations.

4. After 10 minutes, ask for volunteer pairs to introduce each other, noting expectations on a flip chart (don't repeat expectations, just denote with a check mark.) Keep this session moving quickly and remind the group about time if individuals exceed 2 minutes.
5. Review and comment on expectations, noting the ones which may reasonably be met through the workshop and those which will not. Explain why/why not.
6. Use the group's expectations to introduce workshop objectives, pointing out similarities. Explain that the objectives explain the WHY of this workshop.
7. Objectives should be posted (Flip chart #1) so that participants may refer to them throughout the workshop (and either included in a participant notebook or distributed as a handout).
8. At this point speak briefly about the learning methodology used in the workshop -- the HOW of the workshop. Explain that just as part of the workshop content focuses on the importance of participation for sustainable development, the workshop itself will be as participatory as possible, drawing upon participants' experience. The workshop requires active participation and working together in the "learning by doing" process.

Mention that experiential adult learning methodology will be used throughout the workshop. Post and briefly explain the Experiential Learning Model (see Overhead #1). Highlighting the importance of

## Workshop objectives

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**Goal**  
 Develop technical skills to support the full integration of gender and women in development concerns into [KEY AREA] programs and projects

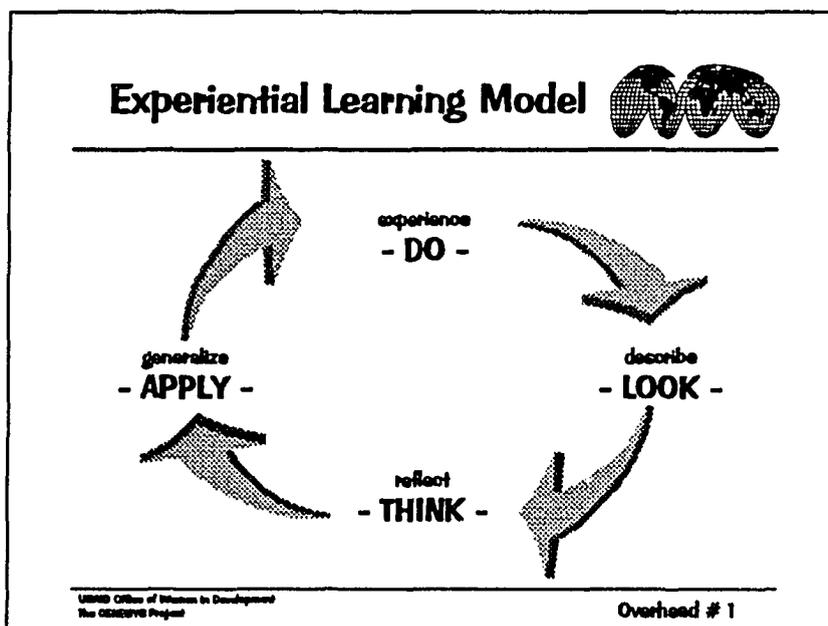
**Objectives**  
 The workshop will provide opportunities for analysis-based training and experience in planning, management and administration of projects to...

- ✓ improve participants' understanding of the effects of gender differences on the design and delivery of [KEY AREA] programs and projects
- ✓ enable participants to include gender-sensitive objectives in planning, managing and evaluating programs and projects; and
- ✓ produce work plans for implementing the objectives of their programs and projects

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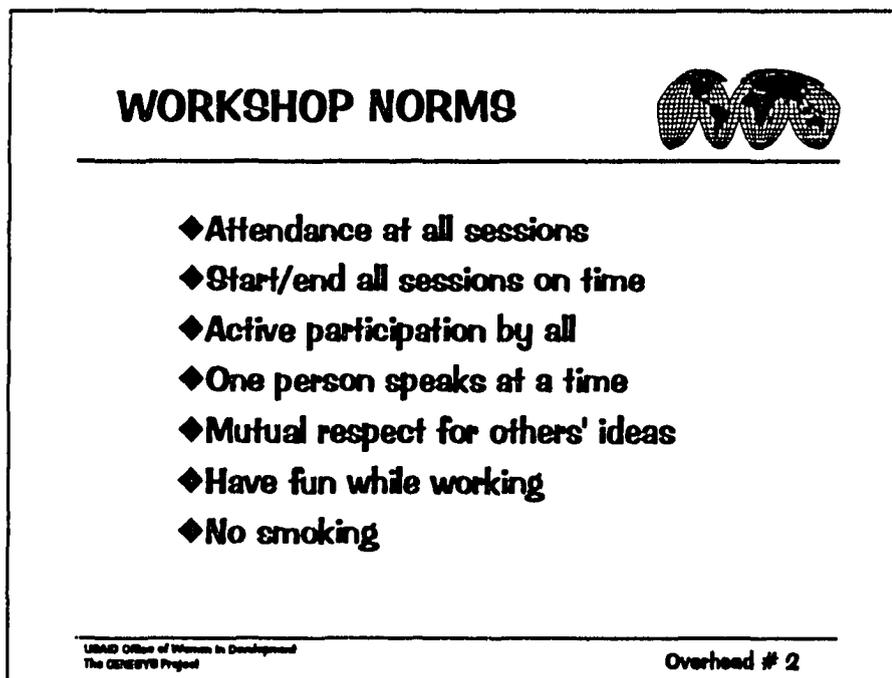
UNAO Office of Women in Development  
The GENEYS Project Flipchart # 1

participant experience in this model and how the workshop activities will help to draw out and build upon such experience.



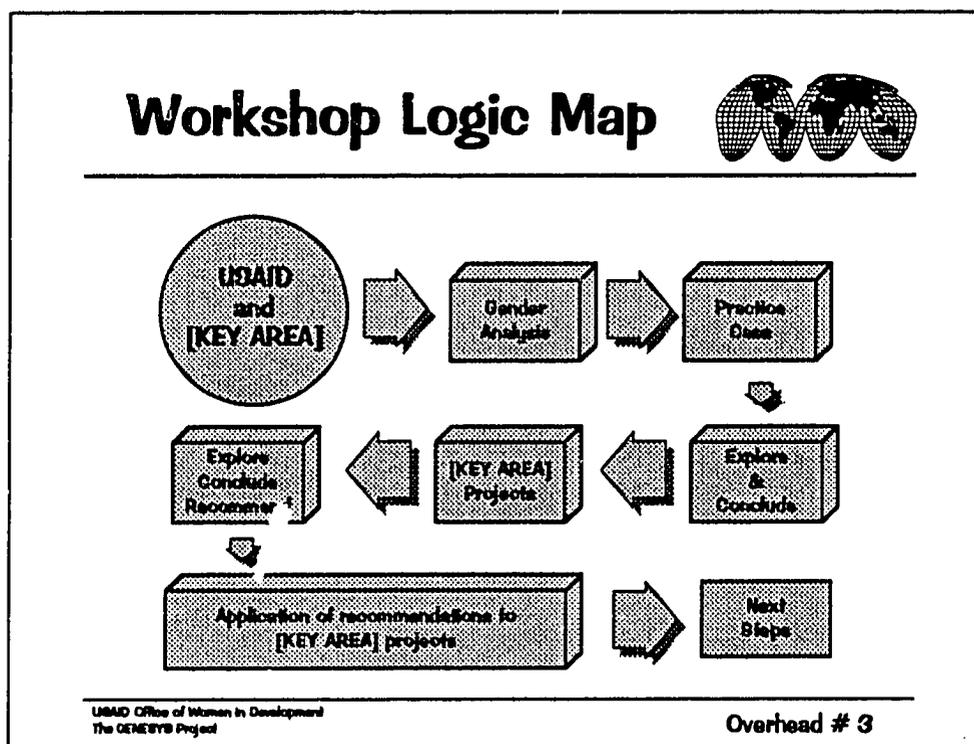
9. Post and explain the suggested norms (see Overhead #2) as operating guidelines for the workshop:

Ask: Does everyone understand the norms? Does anyone wish to add another? Is there consensus about following them?



10. Post the WORKSHOP LOGIC MAP (see Overhead #3), which provides an overview of the workshop. Explain it with the following points:

- ✓ Begin with a short overview of USAID's current policy, strategy and thinking about [KEY AREA], building upon your pre-workshop reading.
- ✓ Next, we'll look at the history and current status of gender analysis in development.



- ✓ We will use a practice case to learn about a gender analysis tool for identifying gender issues and arriving at some conclusions about them.
- ✓ Then we will explore your projects using the gender analysis tool to draw conclusions and make recommendations about how to integrate gender issues.
- ✓ Finally, we will review aspects of the project and program planning process in light of gender analysis.
- ✓ The workshop will close with planning for next steps to help ensure application of learning from this workshop in your individual work situations.

11. Ask for and respond to questions.

12. Close the session.

## SESSION II

### SETTING THE WORKSHOP CONTEXT

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#### **PURPOSE**

To establish the conceptual and contextual framework for the workshop.

#### **MATERIALS**

Prepared flip chart paper or transparencies (see Steps 5, 6, 8, 11, 13, 15, & 16)

#### **PREPARATION**

Prepare flip charts and/or transparencies

#### **TIME**

1 hour

#### **PROCESS**

1. Introduce the session by explaining purpose. Mention that the session will build upon the pre-workshop background materials participants were asked to read, and that participants seeking further background for this session should refer to that reading.

Explain that the session will provide information and opportunity for reflection on gender as a key construct related to USAID's strategies for sustainable and participatory development.

2. Ask participants to think about their roles as related to USAID, and ask themselves how they can be change agents in terms of incorporating gender as a key construct into USAID's [KEY AREA] efforts? Ask them to note their thoughts.

Then ask them to briefly discuss their ideas with a neighbor. (Allow 5 minutes for reflection and discussion)

*FACILITATOR NOTE: This brief activity can serve as an informal "pretest" to help gauge the effectiveness of the workshop. If so, this same question should be asked at the end of the workshop to see if participants have changed their perceptions of themselves as change agents.*

3. After 5 minutes, ask if someone will comment on her/his role as a change agent. After a few have commented, point out that there are many ways that USAID staff and cooperators can be effective change agents and that such energy is needed, particularly to meet challenges which may arise related to USAID's four key program areas of

Democracy and Governance,  
The Environment,  
Economic Growth, and  
Population and Health

4. Next, ask participants to list threats or challenges to these areas, based on their experience and knowledge. Note responses on a flipchart. Add some of the following, if not mentioned by participants:

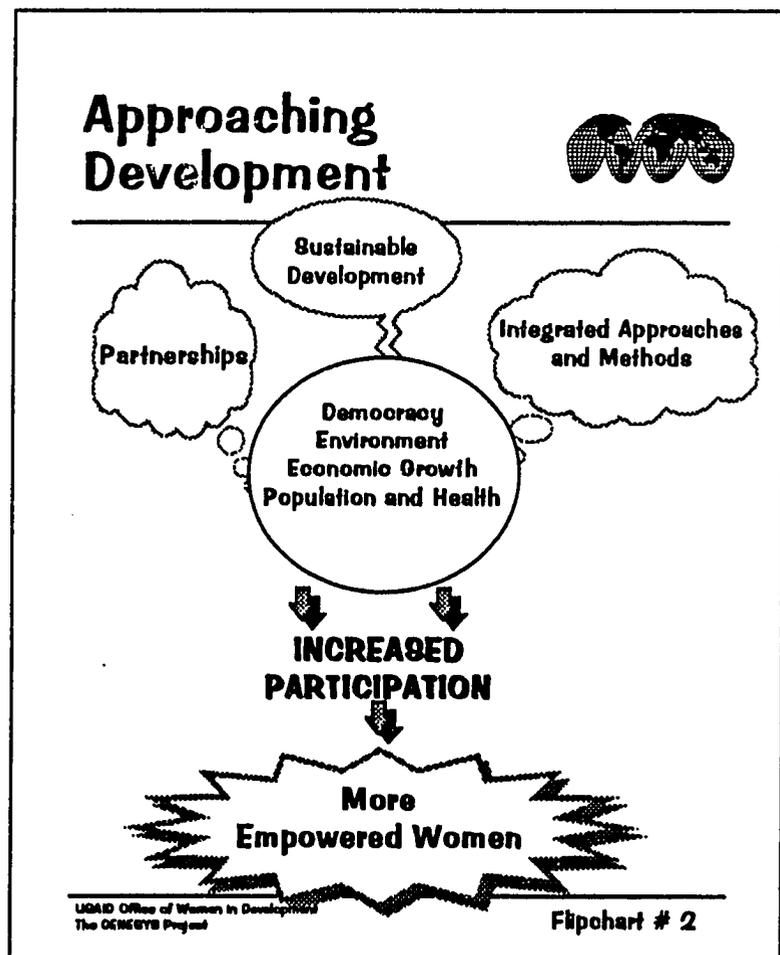
- ✗ continuing poverty
- ✗ unsustainable economic growth
- ✗ hunger and malnutrition
- ✗ population growth
- ✗ rapid urbanization
- ✗ disease
- ✗ environmental degradation
- ✗ absence of democracy

5. Explain that as USAID approaches development assistance in the four key areas, the Agency has adopted strategies which will help to respond to these challenges.

Post the information on Flipchart #2. (Keep flipchart paper posted throughout workshop for participants to refer to.)

Also post three blank pieces of flipchart paper containing the following headings: *Partnerships*, *Sustainable Development*, *Integrated Approaches and Methods*.

6. Point out that USAID's strategy for



development employs certain methodologies:

- ✓ sustainable development,
- ✓ partnerships, and
- ✓ integrated approaches and methods.

Ask participants to first consider the strategy of SUSTAINABLE DEVELOPMENT. Post the following on flipchart or overhead and read:

*USAID sees sustainable development as permanently enhancing the capacity of a society to improve the quality of life.*

Ask them what they think would characterize such sustainable development? (Record their responses on the appropriately titled flipchart, without repeating what participants have already mentioned.)

Add the following points, if not mentioned:

*SUSTAINABLE DEVELOPMENT is characterized by economic and social growth that .*

- ✓ *does not exhaust the resources of a host country*
- ✓ *respects and safeguards the economic, cultural, or natural environment*
- ✓ *creates many incomes and chains of enterprises; and*
- ✓ *builds indigenous institutions that involve and empower the citizenry*
- ✓ *is defined by attitude and outlook, as well as tangible achievements*
- ✓ *requires participation*

7. Ask participants what the construct of PARTNERSHIPS IN DEVELOPMENT means to them. Record their responses on flipchart paper.

Add the following if not mentioned by participants:

*PARTNERSHIPS. . .*

- ✓ *begin with collaboration between donors and host nations*
- ✓ *are strengthened by donor coordination*
- ✓ *are reinforced by PVOs, NGOs, universities, professional and academic groups and training organizations*

- ✓ *utilize strengths of multilateral development banks and international financial institutions*
- ✓ *help to form the basis for ownership and participation of women as well as men which is the foundation of sustainable development*
- ✓ *require local participation, build local capacity, and empower women as well as men*

8. Finally, explain that USAID will be using INTEGRATED APPROACHES AND METHODS to address the totality of development problems confronting development partners. Ask participants what some of these approaches and methods might be.

Add the following if participants do not mention:

- ✓ *cooperate closely with host governments, local communities and other donors*
- ✓ *consider how social, economic, political, and cultural factors combine to impede development and identify root causes and remedies that will address them*
- ✓ *minimize projects that operate without regard for other development programs or larger objectives*
- ✓ *integrate the needs and participation of women into development programs and into the societal changes those programs are designed to achieve*
- ✓ *establish a paradigm of full participation, local involvement, and empowerment*

Explain, and show on Overhead #4, or flipchart:

## Measuring Results

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- ◆ The success of foreign assistance is determined by its impact on developing nations
- ◆ USAID will ask how projects actually affect the way people live. This demanding process...
  - ◆ will ask how projects and programs achieve discrete, agreed objectives
  - ◆ will focus on distinguishing self-sustaining accomplishments from ephemeral ones
  - ◆ obligates people to work as a team in designing, implementing, and evaluating projects and programs
  - ◆ demands communication and cooperation, especially with the citizens of developing countries

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USAID Office of Mission to Development  
The GEMSD Project Overhead # 4

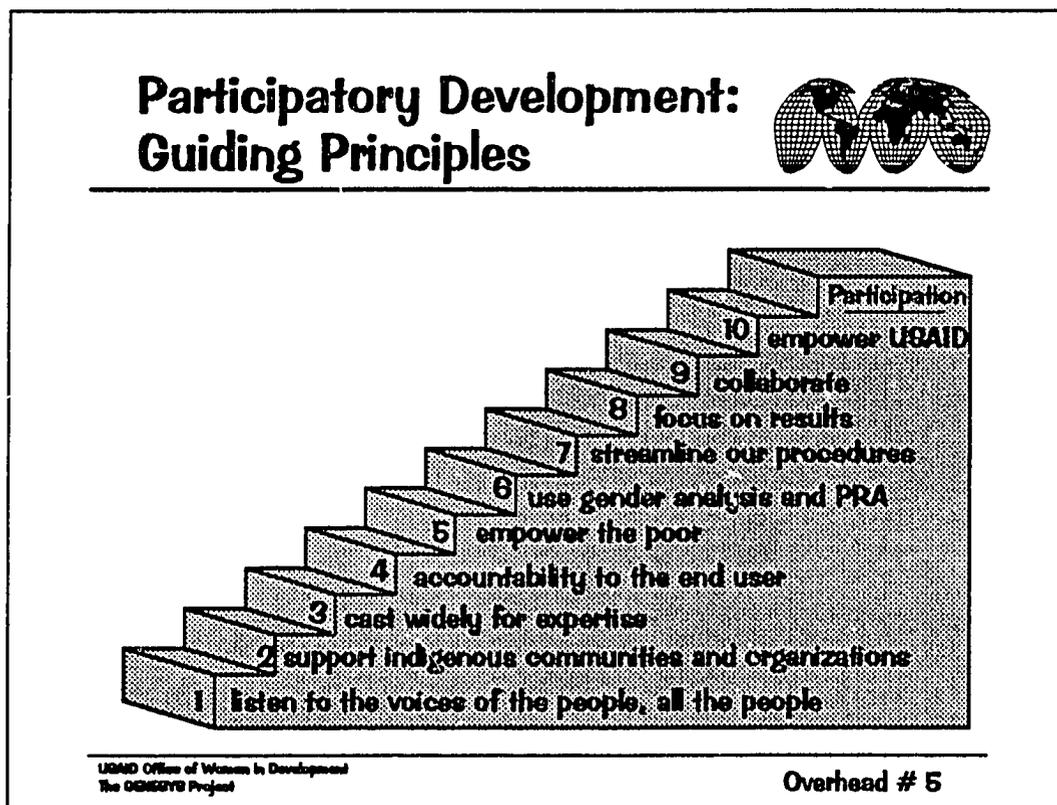
9. Mention that part of USAID's strategy also includes changes in the way it evaluates the success of projects. Increasingly USAID will be focusing on monitoring and evaluating how projects affect people's lives -- requiring a more open-ended and demanding

monitoring and evaluation process.

10. Point to PARTICIPATION on the chart from Step 5 and remind the group that all three aspects of strategy (partnerships, sustainable development, and integrated approaches and methods) as well as the changing approaches to measuring results require PARTICIPATION.

- ✓ Point out that participation describes both the KINDS OF RESULTS DESIRED, and the WAYS USAID MUST NURTURE THOSE RESULTS.

11. Post Overhead #5 (or post on flipchart) the following Guiding Principles of Participatory Development.



Refer participants to the pre-workshop reading, "Statement of Principles on Participatory Development" and briefly explain the posted chart using the following points:

- ✓ Participation builds from the ground, or local, level. This chart illustrates the principles which underlie USAID's approach to increasing participation, and thus strengthening the development process.
- ✓ Explain the 10 principles using the following points:
  1. consult with affected populations seeking their representation

2. seek to understand what is already happening while still supporting new ideas; recognize local priorities while honoring USAID's priorities
  3. consult more widely with experts as well as with organizations representing various interests
  4. develop mechanisms for hearing more directly from affected populations
  5. support and strengthen capacity of poor to sustain the development process
  6. overcome the tendency of projects to benefit only local elites
  7. allow local reality, rather than procedures, to drive programs
  8. focus on results experienced by real people rather than merely tracking material inputs to projects and adherence to procedures
  9. practice a respectful partnership with indigenous and U.S. or international private voluntary organizations
  10. take measures necessary to equip USAID to make good on above principles
12. Highlight points 6 and 10 which specifically *mandate* addressing women and gender analysis. (Other points strongly imply that women need to be included more as contributors to, beneficiaries of, and participants in the development process -- and these, too, can be highlighted.)

❖ Point 6: To overcome the tendency of projects to benefit only local elites, we will use gender analysis and techniques for data collection and consensus building such as participatory rural appraisal (PRA).

❖ Point 10: We will take the measures necessary to equip ourselves to make good on these principles... We will strengthen relevant skills and aptitudes in our staff and contractors -- stronger language and cultural skills, skills in discerning social processes, gender analysis and other techniques to enhance participation.

Note that through these principles the Agency is specifically indicating a need for gender analysis for staff and contractors. Therefore this workshop responds to the mandate inherent in both points 6 and 10.

13. Refer back to the chart in Step 5 and, using a brightly colored marker, highlight the [KEY AREA] reminding the group that this workshop will focus on technical skills needed to support the full integration of gender and WID concerns into [KEY AREA] programs and projects.

Point out that the [KEY AREA] calls for...

- ❖ USAID to focus its experience, skills, and resources explicitly to...
- ❖ (Democracy and Governance)... help promote and consolidate democracy.
- ❖ (Environment)... reduce long-term threats to the global environment and promote sustainable economic growth by addressing environmental and economic practices.
- ❖ (Economic Growth)... encourage broad-based economic growth.
- ❖ (Population and Health)... stabilize world population growth and protect human health.

Also point out that USAID is supporting this priority because it sees...

- ❖ (Democracy and Governance)... democracy as desirable as an end in itself, and because it is critical in promoting sustainable development.
- ❖ (Environment)... that environmental problems increasingly threaten the economic and political interests of the U.S. and the world at large.
- ❖ (Economic Growth)... that economic stagnation affects many areas of sustainable development by feeding political instability; causing environmental degradation; and contributing to poor health, high population, and perpetual lack of food security.
- ❖ (Population and Health)... that rapid population growth and poor health exacerbate those conditions which play critical roles in keeping nations poor.

14. Refer back to the chart from Step 5 and point out that the participation of women as well as men is essential for [KEY AREA], as well as for the three aspects of USAID's strategy for development assistance -- partnerships, sustainable development, and integrated approaches and methods.

**FACILITATOR'S NOTE:** Steps 15 & 16 pertain to democracy and governance and cannot be easily transformed. See Appendix E for substitutions to use with workshops related to gender and economic growth, the environment, and population and health.

15. Post Overhead #6, or use flipchart:

Ask participants to reflect upon their own experiences and note the impediments they are aware of to this path of promoting democratic societies. (5 minutes).

## The USAID Path

---

☉ All sustainable democracies share certain fundamental characteristics: respect for human and civil rights, peaceful competition for political power, free and fair elections, respect for the rule of law, accountable government and an environment that encourages participation by all sectors of the population.

But, there are  
***impediments***  
to the development of these characteristics

---

USAID Office of Women in Development  
The DEMWYS Project Overhead # 6

Ask for some ideas. Note responses on flipchart. Add some of the following if not mentioned:

- ✓ *corruption*
- ✓ *absent or weak intermediary institutions*
- ✓ *disenfranchisement of women, indigenous peoples, and minorities*
- ✓ *ethnic divisiveness*
- ✓ *hypernationalism*
- ✓ *absence of national charters*
- ✓ *tainted electoral politics*
- ✓ *non-existent or weak political parties*
- ✓ *human rights abuses*
- ✓ *misperceptions about democracies*
- ✓ *lack of experience*

- ✓ *over-centralization*
- ✓ *human rights abuses*

---

**Highlight the disenfranchisement of women, indigenous peoples, and minorities and how attending to gender concerns and issues can help ease this constraint.**

---

16. Finally, show Flipchart #3 (or overhead) of activities and actions USAID will support under this priority.

17. In closing this part of the activity, briefly refer to or review the key pieces of posted flipchart (from Steps 5-16). Ask for and respond to questions.

18. Link to next session by explaining that we will be building upon this overview of USAID's strategy and priorities for development assistance by examining some of the correlates related to [KEY AREA] projects.

19. Close the session.

## Democracy

---

### USAID will support...

- ◆ constitutional mechanisms
- ◆ democratically elected legislatures
- ◆ legal systems
- ◆ local government entities
- ◆ credible and effective elections
- ◆ local, national, regional, and international organizations that protect human rights
- ◆ trade unions, professional associations, women's groups, educational entities, and a wide range of indigenous NGOs
- ◆ political parties and other national mechanisms of political expression
- ◆ independent media outlets
- ◆ improved civil-military relations
- ◆ institutions and organizations that increase government responsiveness and accountability
- ◆ educational efforts for children and adults

---

USAID Office of Women in Development  
The OENRYS Project Flipchart # 3

## SESSION III

# DETERMINING CORRELATES TO USAID'S PRIORITY AREAS

---

### **PURPOSE:**

To determine priorities among correlates related to [KEY AREA] projects.

### **MATERIALS:**

Set of correlates, one per participant (see Appendix C, Handouts #1 - #4, for sets)

### **PREPARATION:**

Make copies of "Correlates to [KEY AREA]" (one per participant) -- cut into strips, creating a set. Bind with a rubber band or paper clip. Make one set per participant.

### **TIME:**

30 minutes

### **PROCESS:**

1. Open session by explaining purpose and linking it to the previous session on setting the context.
2. Distribute the correlates handout and ask each person to individually review the strips, eliminating those correlates from the set which, in their opinion, are the *least* relevant to achieving their [KEY AREA] objectives.

Allow 5 minutes for this task.

3. Next, explain that participants will be working in small groups to agree on the 6 *most* relevant correlates for achieving their [KEY AREA] objectives.

Divide participants into groups of 5-6. Explain that they will have 20 minutes to reach consensus on their task of deciding the 6 most relevant correlates.

Distribute a long piece of tape to which they can attach their correlates, once they have agreed on the 6 most significant.

4. After 20 minutes, ask each group to post and explain their list, and *why* they decided as they did. Each report should be 5 minutes or less.

After each has presented, ask for others to comment.

Also ask the groups what was easy or hard about the task of arriving at consensus, and why.

5. Close this session by pointing out the importance of checking with those who are involved in a project and those who will be affected by its outcomes, as well as those with whom we will be working. We must constantly check our assumptions.

Point out that the gender analysis tool which we will be learning to use in this workshop provides a framework for asking some important questions (checking our assumptions) regarding gender in [KEY AREA] projects.

## SESSION IV

# INTRODUCTION TO GENDER ANALYSIS: WID'S HISTORICAL PATH IN USAID

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### ***PURPOSE***

To illustrate how gender and development and gender analysis have evolved out of WID.

### ***MATERIALS***

Prepared newsprint (see Step 3)

Transparencies (see Step 3)

Handouts (see PREPARATION)

### ***PREPARATION***

Prepare flip charts

Assemble transparencies

Copy Handouts (or refer to handouts in participant manual)

- ❖ Gender and Development Definitions, Appendix C, Handout #5
- ❖ USAID and Gender: Key Dates, Appendix C, Handout #6
- ❖ Features of Current Legislation, Appendix C, Handout #7

### ***TIME***

30 minutes

### ***PROCESS***

1. Introduce session by mentioning that earlier sessions focused on USAID priorities to help develop the context for the workshop. Recall particularly the sessions focusing on [KEY AREA]. Explain that this session, too, focuses on context, but in terms of gender.

Explain that this session will briefly review the history of WID within USAID.

2. Begin by asking participants to write down what comes to mind when they think about the term "WID." (Allow 2-3 minutes)

Next, ask them to write down what comes to mind with the term "gender." (allow 2-3 minutes)

Record their responses on a piece of flip chart paper with two columns.

3. Post the following definitions and description of gender and development, Flipcharts #4 - #7.

## Women in Development

---

"The essence of a Women in Development approach is to ascertain what women actually want and do within a society and provide them with opportunities and skills and resources to enhance that participation.... [T]he WID strategy rests on creating more rational and evenhanded planning which takes into account the sex division of labor, fair returns for labor, and the equitable infusion of new opportunities and resources to all members of a given community."

• Kathleen Staudt  
Women, Foreign Assistance and Advocacy Administration

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UNEP Office of Women in Development  
The GENDEV Project Flipchart # 4

## WID and GAD: What's the Difference

---

Although the critical distinction between sex and gender is well known, the further distinction between Women in Development (WID) and Gender and Development (GAD) is less clear.

WID

The WID approach...is based on the underlying rationale that development processes would proceed much better if women were fully incorporated into them (instead of being left to use their time 'unproductively').

GAD

In contrast, the GAD approach maintains that to focus on women in isolation is to ignore the real problem, which remains their subordinate status to men.

Carolus O.M. Meier  
Gender planning and development

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UNEP Office of Women in Development  
The GENDEV Project Flipchart # 5

## Gender and Development

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"I understand the concept of gender to be a system of socially ascribed roles and relationships between men and women, which are determined not by biology but by the social, political and economic context. Gender roles are learned and they can change over time. It is the analysis of these roles and relationships which shows the imbalances in power, wealth and workload between women and men, and it is this analysis which may then lead to the *possibilities and necessity* of change."

- Jan Seed

---

UNEP Office of Women in Development  
The GENDEV Project Flipchart # 6

## The Gender Dimension of Development

---

- ◆ Is about both what men and women do
- ◆ Looks at the impact of development on both men and women, and their impact on development
- ◆ Seeks to see that both men and women participate and benefit equally from development
- ◆ Recognizes that women may be involved in development, but may not necessarily benefit
- ◆ Seeks to understand the root causes of gender inequality and addresses itself to these causes
- ◆ Emphasizes gender relationships and focuses on the reduction of disparities
- ◆ Emphasizes equality of benefit and control
- ◆ Recognizes the need to look at equity of impact
- ◆ Not concerned with women per se, but with social construction of gender and assignment of specific rights, roles, responsibilities and expectations to women and men
- ◆ Addresses the inter-relationship between gender roles, access to and control of resources and power

---

UNEP Office of Women in Development  
The GENDEV Project Flipchart # 7

4. Explain that these definitions are not the final word, but represent current thinking about WID and GENDER. With the participants, compare the group-generated ideas about WID and GENDER with these definitions.

Look for similarities and differences. Comment on these.

**FACILITATOR NOTE:** *The flipcharts above could be given as handouts.*

5. Refer participants to handouts on "USAID and Gender: Key Dates" and "Features of Current Legislation" and point out that USAID has taken a progressively more inclusive view and developed more active strategies to insure that gender is included in all aspects of development work.
6. Close this session and make a transition to the next by explaining that because the concept of gender focuses on the socially defined characteristics of men and women in particular situations in terms of the tasks they do and the results of these tasks, it has required a new way of looking at the world. This "lens" is GENDER ANALYSIS.

## SESSION V

# GENDER ANALYSIS — CONTEXTUAL ANALYSIS OF GENDER AND SOCIAL AND ECONOMIC ISSUES

---

### **PURPOSE**

To introduce and practice a gender analysis tool.

### **MATERIALS**

Set of contextual gender analysis worksheets (see Appendix C, Handouts #8 - #15)

*Tips for Conducting Contextual Gender Analysis* (see Appendix C, Handout #16)

Flip charts or transparencies (see Steps 5, 6, & 8)

Pre-workshop reading: *Gender and Development*

### **PREPARATION**

Make copies of the contextual gender analysis worksheets (one set per participant)

Make copies of *Tips for Conducting Contextual Gender Analysis* (one per participant)

Prepare flip charts

Prepare transparencies (if used)

Prepare a wall chart-size version of the contextual gender analysis summary sheet (Appendix C, Handout #8) by posting four sheets of flip chart paper on the wall prior to the session. Place it where it can easily be seen by all participants.

Make flip chart-sized copy of the model of Contextual Analysis of Gender and Social and Economic Issues (see Step 8, Overhead #9)

Case study (Babundadzi, available on request from the USAID Office of Women in Development). Ideally, the case should be provided to participants in their pre-workshop reading packet. If this is not possible, it can be read over the lunch break.

### **TIME**

3 hours (This is a long session, so be sure to take one or two breaks where they best fit or as needed.)

### **PROCESS**

1. Introduce the session by explaining the purpose.

Building on the previous session, remind participants that GENDER ANALYSIS . . .

- ✓ has become commonly accepted to analyze roles and to apply that analysis to decisions about programs, policies and projects.
- ✓ IS NOT a specific technology, but is a way of looking at the world
- ✓ IS a lens that brings into focus the roles, resources, and responsibilities of WOMEN and MEN within the system under analysis.

Gender analysis and the tools which have been developed to do such an analysis provide valuable input to planning for sustainable development.

2. ASK the group: Accepting that gender analysis is important...

WHEN, in the project cycle, should we analyze gender differences in roles, constraints, and opportunities?

Respond to participants' responses -- note on flip chart if you wish -- helping them to see the importance of such analysis...

*At ALL phases of the project cycle – in planning, implementation, and monitoring and evaluation.*

If they haven't listed the following, point out that examples of when to use in [KEY AREA] projects would include:

- ✓ documents such as requests for proposals, scopes of work, indefinite quantity contracts, training, monitoring and evaluation plans, and annual work plans

3. ASK: WHERE in development programming, should such analysis occur?

Again, respond to their comments helping them to see that such analysis should occur at...

*the country, sector, program, and project levels of activity.*

Point out that with [KEY AREA]

- ✓ Gender should be included as a key construct in the core analytical and strategic planning stages of all [KEY AREA] undertakings.
- ✓ A cross-section of local women and women's groups should be included in all stages of design, implementation, and evaluation of those undertakings.

4. ASK: WHY do we need the data which gender analysis can provide?

Respond to their ideas and add the following points if they do not include them:

- ✓ challenge assumptions
- ✓ describe the current situation
- ✓ plan accordingly
- ✓ monitor
- ✓ make adaptations
- ✓ evaluate

Again, specifically in terms of [KEY AREA], point out the following consequences if gender is excluded from the analysis and resulting program:

- ✓ women will inevitably be omitted from mainstream project and program activity
- ✓ women will end up being ignored or relegated to an "add-on" activity
- ✓ because projects and programs don't take advantage of women's participation and contributions, development will suffer

5. In summary response to the question "Why?" -- post Overhead #7:

## Why Bother?



---

**"For the simple reason that it makes sense. Development projects that ignore 50 percent of the economically active population will not lead to development, much less equitable development."**

*~ Mohini Malhotra  
Why Bother With That Gender Issue?*

**"For the even simpler reason that it is the right thing to do."**

*~ Me and many others*

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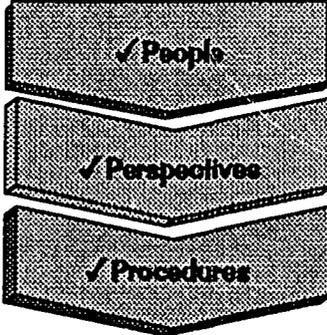
**Overhead # 7**

6. Post Overhead #8, and close this background part of the session by pointing out the importance of:

## Gender Dimensions of Development - How?



Use  
training, technical assistance, communications, and research  
to influence...



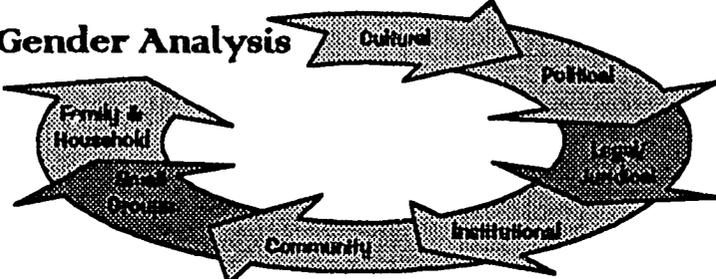
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Overhead # 8

7. Explain that with this background on WHEN, WHAT, WHY, and HOW of gender analysis, we will now look at gender analysis in relation to particular development objectives and learn to use a new gender analysis tool.
8. Post Overhead #9: Contextual Analysis of Gender and Social and Economic Issues.

## Contextual Analysis of Gender and Social and Economic Issues



**Gender Analysis**



Constraints to and opportunities for gender equity in the development process exist in a context of multiple levels of social and economic systems. Analysis of these constraints and opportunities must occur at all levels of that context in order to define feasible steps toward change.

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The GENWYS Project
Overhead # 9

Explain that constraints and opportunities to gender equity in the development process exist in a context of levels of social and economic systems.

Point out that when examining an equity problem -- whether related to gender, age, race, residence or other factors, it is helpful to think about which specific issues are related to different levels of the system.

Explain that contextual analysis is designed to identify and address those specific issues and to determine which types of action or intervention, based on a program or project purpose, can best lead to change.

Explain that analysis of constraints and opportunities for action must be analyzed in the context of such levels and that some--ie., the family, household, small groups, etc. -- are becoming increasingly complex as societies change.

Refer to the pre-workshop reading, *Gender and Development*, for further detail.

9. Explain the different levels of an equity problem related to gender, age, ethnicity, or race using the following points.

While explaining, refer to the wall chart and point out how each component relates to it.

- ❖ **CULTURAL COMPONENT:** is dynamic, changes slowly over time, and is usually not a direct intervention target
- ❖ **POLITICAL COMPONENT:** may have vested interest in status quo, and often does not represent all stakeholders
- ❖ **LEGAL/JURIDICAL COMPONENT:** is important in policy analysis and can be targeted in policy dialogue, also may be a focus of legal system reform
- ❖ **INSTITUTIONAL COMPONENT:** frequently controls access to resources, usually implements policy, and can be an intervention target
- ❖ **COMMUNITY COMPONENT:** is often a local gatekeeper for resources, influences cultural changes, and is an important target for collecting and disseminating information
- ❖ **SMALL GROUP COMPONENT:** changes configuration due to function, is often an important entry point for development activity, is also an important target for collecting and disseminating information, and can identify and implement intervention
- ❖ **HOUSEHOLD AND FAMILY:** are important in gender role analysis, are dynamic and multi-dimensional, are important target for collecting and disseminating information, and acts in context of other levels of systems

TRUE  
OF  
ALL  
LEVELS



10. Referring to the chart explain that, for example, differences in educational opportunities based on gender can be examined at each of the levels in the framework:

✓ e.g., *CULTURAL* traditions may see education for boys as part of a rite of passage to adulthood or support the belief that too much education makes a girl less marriageable. We might make these assumptions at the cultural level, but are they valid and what information is needed to test the hypothesis?

✓ The same questions about assumptions should be asked at each of the system's levels.

✓ e.g., *INSTITUTIONAL* level assumptions might result from assumptions about the unwillingness of families to send their girls to school. But a testing of those assumptions might uncover information showing that "not sending girls to school" is not the problem, per se, but that the perception (and perhaps experience) of families is that girls attending school are at physical risk. The constraint to change then perhaps becomes "unsafe schools with inadequate security for girls," rather than people's attitudes regarding the education of females. This understanding makes a big difference in defining opportunities for change and specific steps for action.

11. Explain that the contextual analysis approach is not designed to suggest that interventions can or should be made at all levels. It is, however, designed to expand thinking about types of opportunities for change and to bring more specificity to the identification of action steps at various levels. If a primary issue is at the institutional level, and actions are taken only at the community or household level, change will be limited.

Similarly, interventions can be introduced at an institutional level, but if solutions to a problem require a change in behavior at the household level, the success of those interventions will be minimal at best.

By analyzing an equity problem at each level, constraints and opportunities can be addressed and interventions can be more carefully pinpointed.

Post Overhead #10 and explain that these issues should be explored at each level, and will help project staff to decide at which levels actions should be taken.

## Contextual Analysis



◆ Exploring the multiple levels of social and economic systems is key. Gender analysis looks at:

- ◆ issues at the cultural, political, legal/judicial, institutional, community, small group, and family and household levels: this helps us to clarify components of an equity problem related to gender, age, ethnicity, or race
- ◆ identify assumptions that exist about the problem
- ◆ test those assumptions
- ◆ specify change needed to achieve development objectives
- ◆ articulate specific constraints to change
- ◆ define opportunities for change
- ◆ develop specific steps for action

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Overhead # 10

12. Explain that the tool subjects each level of social and economic systems to the investigations indicated by the column headings -- issues, assumptions, changes needed, constraints, and actions.

To involve participants, ask them for examples of what could go in the boxes on the chart -- beginning with issues, then on to assumptions, change, opportunities and constraints, and specific steps for action.

Explain that this is a summary chart of worksheets designed for each of the contextual levels.

In explaining the chart, point out that not all cells in the analysis apply to all levels of systems. It is also evident that, for a given issue, immediate action can be initiated at some, but not all, levels.

**FACILITATOR NOTE:** *A break might be needed here.*

13. Explain that now, working in small groups, participants will work in greater detail with the contextual analysis tool.

Explain that each group will be working at a different analysis level (i.e., cultural, political, legal/judicial, and so on) with the short case study provided.

**FACILITATOR NOTE:** *Instead of using the Babundadzi case study, you may supply one. Or, if participants are all familiar with a large local project, they may use objectives from that project to complete this activity.*

Post and explain the following group task instructions:

- ✓ **Focus first on issues and assumptions which the project makes.**
- ✓ **Continue working down the levels through Changes Needed to Achieve Development Objectives.**
- ✓ **Be prepared to post on flip chart and report out on your results after 30 minutes.**

**(Refer to page 8 of pre-workshop reading, *Gender and Development*, and the handout *Tips for Conducting Contextual Gender Analysis* for specific aspects to consider during analysis.)**

14. **Form work groups of an equal or similar size (at tables, or otherwise). Distribute worksheet packets and designate one level per table. Also distribute, one to each participant, *Tips for Conducting Contextual Gender Analysis*.**
15. **After 30 minutes, ask each group to present, limiting presentations to 10 minutes per group.**  
**As they present, summarize their analysis and link their work to the wall chart.**
16. **Close this session.**

## **SESSION VI**

# **GENDER ANALYSIS — PRACTICAL APPLICATIONS**

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### ***PURPOSE***

To practice using gender analysis on an actual project.

### ***MATERIALS***

Project Packets

Set of contextual gender analysis worksheets (see Appendix C, Handouts #8 - #15)

*Tips for Conducting Contextual Gender Analysis* (see Appendix C, Handout #16)

### ***PREPARATION***

Prepare project packets (Project documentation should be sent in advance by the participants, organized by project, labeled with the project title, and set out for participants to select.)

Make copies of the contextual gender analysis worksheets (one set per participant)

### ***TIME***

3 1/2 hours

### ***PROCESS***

1. Explain the purpose of the session and remind participants that they will be working in their project groups for most of today.
2. Explain that projects have been selected to use as "case studies" throughout the remainder of the workshop. Participants will gain a better understanding of the tools and information to come if they are able to ground their learning in real projects.

Explain that some people will be giving short presentations on these projects. Following the presentations, participants will select the one project on which they would like to work for the remainder of the workshop.

4. Ask persons presenting projects to make their presentations at this time (5-7 minutes each).
5. When the presentations have been completed, ask participants to form small groups of no more than 5 persons by selecting a project. Have each project presenter stand so that the teams can form by standing near that individual. If the groups are relatively evenly distributed,

have them sit together at a table. It is not advisable to have groups of less than 3 persons, as the work will be more difficult to do.

6. Explain that, as in the previous exercise, the groups will be working with the contextual gender analysis tool. But this time, they will be working with a real project and will also be working with all levels, to the extent that they can and time allows.

Participants should pick up and review their project packets.

Then, as before, they should begin with issues and assumptions, working their way through changes needed to meet the development objective, opportunities for, and constraints to achieving those changes, and finally to specific actions to accomplish the changes. Handout #16, given to participants during Session V, provides several useful tips for conducting the analysis.

They will have 2½ hours to complete their worksheets, report back to the others, and engage in a plenary discussion of results. Once again, they should develop a summarized/abbreviated form of their matrix on a piece of flip chart paper.

7. After 1½ hours, ask each group to report out on their progress. They have 5 minutes to report out.

After each has presented, allow 5 minutes for questions from the others.

After all have presented, open a discussion with the following questions:

- ✓ In what ways was this exercise helpful?
- ✓ What was difficult about it?
- ✓ Why?

How can such a tool strengthen [KEY AREA] projects?

8. Close this session.

## SESSION VII

### IMPLEMENTATION PLANNING — PART I

---

#### **PURPOSE**

To provide participants with practical tools for implementation planning, particularly for determining outcomes, and practice in using them with projects.

#### **MATERIALS**

Flipcharts or transparencies (see Steps 2, 4, 5, 6, 7, 8, & 10)

*Definitions for Project Planning and Performance Monitoring* (see Appendix C, Handout #17)

*Project Amendment Worksheet* (see Appendix C, Handout #18)

#### **PREPARATION**

Prepare flip charts or transparencies (Steps 2, 4, 5, 6, 7, 8, & 10)

Make copies of *Definitions for Project Planning and Performance Monitoring* (one per participant)

Make copies of *Project Amendment Worksheet* (one per participant)

#### **TIME**

3-4 hours

#### **PROCESS**

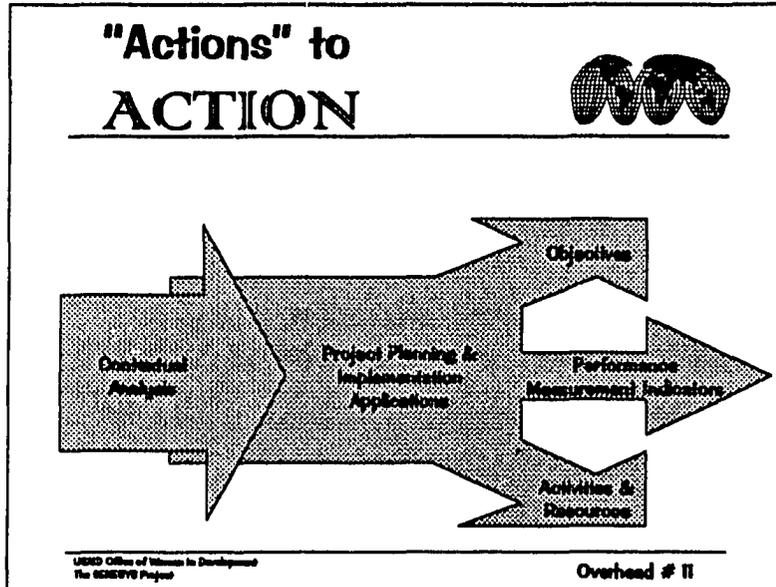
1. Introduce the session by explaining the purpose. Mention that this session involves a shift in focus from the analysis of gender concerns to the language of implementation planning.

Remind the group that gender analysis provides input for planning. The Contextual Analysis Tool which we have been using so far provides valuable input for determining project outputs. In fact, gender analysis often changes outputs.

For that reason, this session will focus broadly on planning, but specifically on determining and writing project outputs.

2. Post Overhead #11 depicting "Actions" to ACTION.

Explain that out of analysis comes the framework for project planning and implementation. The objectives describe desired outcomes;



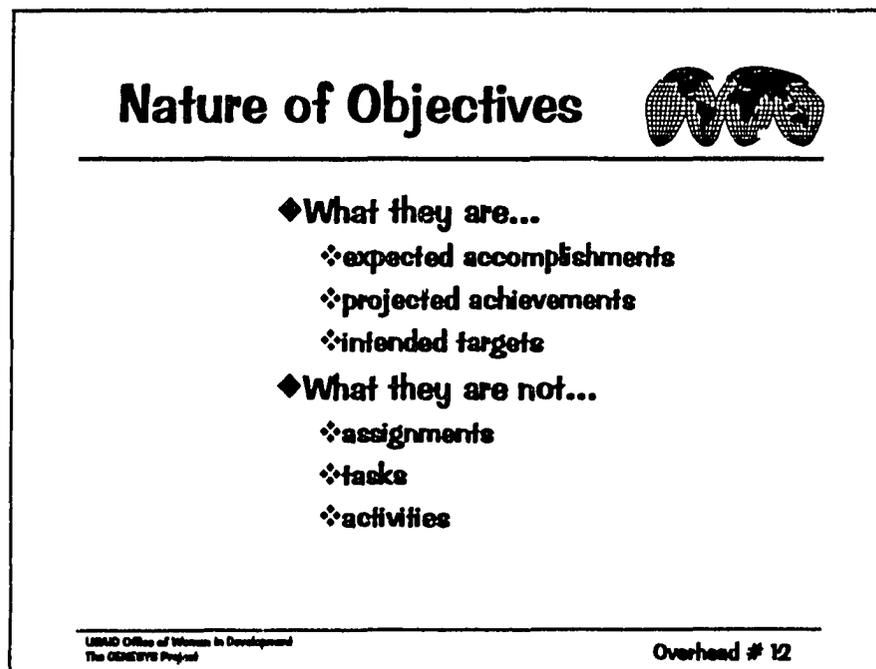
followed by activities and resources leading to accomplishment of objectives. Performance measurement indicators outline how progress will be measured.

3. We may need to clarify terms. Explain that the language of planning is sometimes confusing -- for example, how do we know the difference between a goal and an objective.

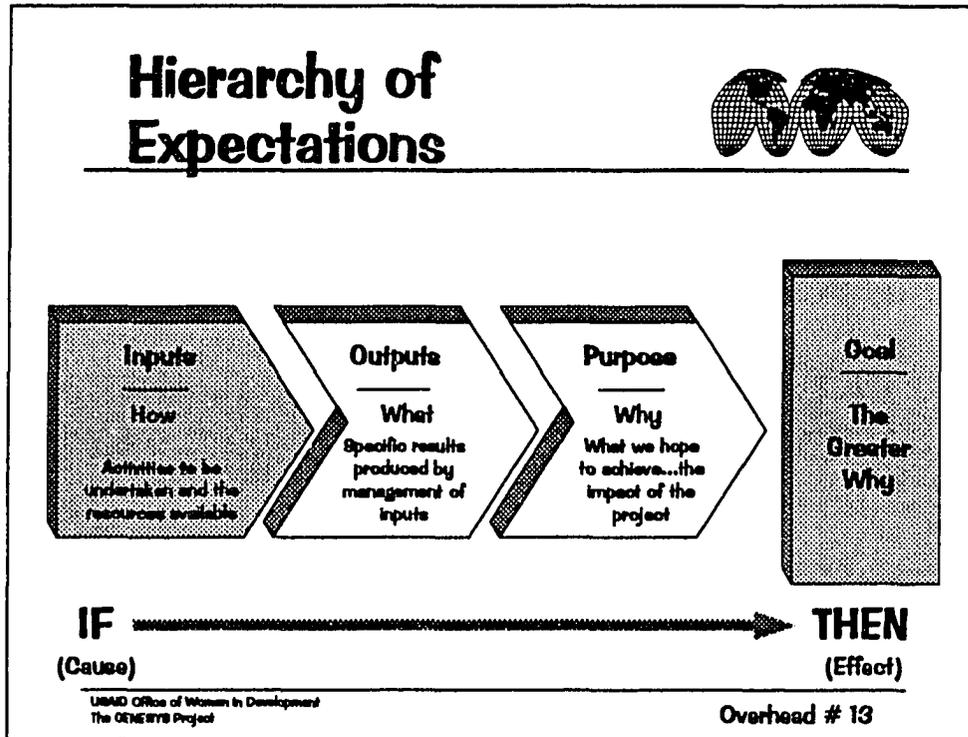
Suggest that we agree on some basic definitions.

Distribute and review Handout #17: *Definitions for Project Planning and Performance Monitoring*.

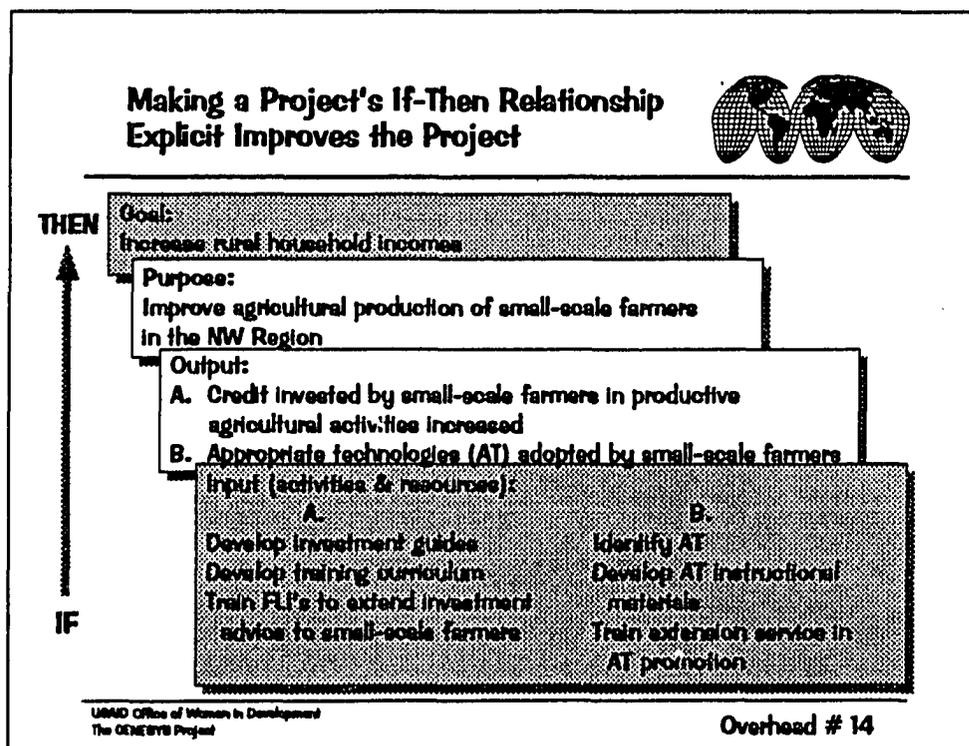
4. Mention that there is often confusion related to objectives. Post and explain the following Overhead #12:



5. Post and explain Overhead #13, Hierarchy Of Expectations, to show the inter-relationship of inputs, outputs, purpose, and goal:



6. Post Overhead #14 and use it as an example to help explain the IF-THEN relationships:



FACILITATOR NOTE: For the following, substitute an appropriate example for each of the four priority areas. The examples should reflect gender considerations.

7. Explain that this part of the session will be building upon the previous one where they began to apply the contextual analysis tool to their own project.

Explain that in order to determine if an objective has been achieved, we must create an objectively verifiable indicator (OVI).

Post and explain Flipchart #8:

## Performance Measurement

---

◆ **Objectively Verifiable Indicators...**

- ◆ are conditions that signal success
- ◆ force us to clarify what we mean by our objectives
- ◆ provide an objective basis for monitoring and evaluating
- ◆ have the following four attributes:
  - ◆ **Plausible**
    - ✓ measures what is important in a project (not what is easy)
    - ✓ measures changes attributable to the project
  - ◆ **Independent**
    - ✓ don't use indicators at one level to measure success at another
  - ◆ **Targeted**
    - ✓ Levels of achievement must be specifically defined
    - ✓ how much? (quantity)
    - ✓ how well? (quality)
    - ✓ by when? (time)
  - ◆ **Objectively Verifiable**

---

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The GENESYS Project Flipchart # 8

Explain that a good indicator is **PLAUSIBLE** if it measures what is **IMPORTANT** (not necessarily what is easy); and measures changes **ATTRIBUTABLE** to project.

**EXAMPLE:**

- ✓ *Objective:* Credit invested by small-scale farmers in productive agricultural activities increased
- ✓ *Bad OVI:* Number of loans made
- ✓ *Better OVI:* Ratio of credit value repaid to credit value loaned
- ✓ *Assumptions:*
  1. returns to credit invested in productive agricultural activity will result in higher ratios
  2. unanticipated externalities (e.g., drought) don't intervene

Explain that a good indicator is **INDEPENDENT** if it measures success at one level. That is, don't use indicators at one level to measure success at another.

Explain that to be **TARGETED**, specific levels of achievement must be specifically defined, showing QQT (Quantity, quality, and time.).

Explain the 4-step process to create objectively verifiable indicators (OVIs)

- ✓ **identify indicator** (ask for example from group or use one below)
  - ❖ E.g., ratio of credit value repaid to credit value loaned
- ✓ **determine quantity**
  - ❖ E.g., ratio of credit value repaid to credit value loaned increases by 20%
- ✓ **set quality**
  - ❖ E.g., ratio of credit value repaid to credit value loaned by formal lending institutions increases by 20%
- ✓ **specify time**
  - ❖ E.g., ratio of credit value repaid to credit value loaned by formal lending institutions increases by 20% within 2 years from date of project start up

**ASK IF THERE ARE QUESTIONS? Respond.**

8. Post Overhead #15, Project Planning and Implementation Framework, and explain its various aspects. Then distribute the *Project Amendment Worksheet*.

# Project Planning and Implementation Framework



	Project Expectations	Indicators	Means of Verification
THEN ↑ IF	Goal: What is the overall reason for the project? To what national or regional program objective will the project contribute?	What indicators will signal achievement of the goal?	Specific source of data and method of obtaining it.
	Purpose: Briefly state what the project is expected to achieve, if completed successfully and on schedule.	Describe the conditions or situation which will exist when the project achieves its stated purpose -- i.e., end-of-project status.	What are the types and sources of evidence to be used in verifying the condition or situation.
	Outputs: What are the major kinds of results that can be expected from good management of the inputs?	What are the specific indicators for each of the planned outputs -- i.e., how much of what, for whom, by when?	What are the specific sources of data for each of the indicators, and how are the data going to be obtained?
	Inputs: What are the key activities and resources?	For each category of inputs, identify the quantity and/or dollar value, by year (budget).	Specify source documents (e.g., records, reports).

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Overhead # 15

Explain that participants will be working in project groups to first identify outputs (30 minutes). Suggest that each group make a flipchart size Project Amendment Worksheet which they can fill out as we work through the next couple of sessions.

Suggest that their project outputs should reflect the information and insight they have gained from working through the Contextual Analysis of Gender and Social and Economic Issues.

FACILITATOR NOTE: If the project is large and multi-dimensional, they may wish to focus only on one component.

9. After 30 minutes, have each group report briefly (5 minutes) on their expected outcomes.
10. Next, post and explain the following group task instructions:
  - ✓ For each output identified, develop at least one indicator.
  - ✓ Prepare to report on Purpose, Goals, Objectives (Outputs), and Indicators
  - ✓ Groups will have the remainder of the day to work on the task. Each group should be prepared to make a 20 minute (maximum) report in the morning.

Ask for and respond to questions.

**FACILITATOR NOTE:** Is important that you move from group to group offering support and giving assistance where needed. Be certain that the objectives are stated correctly. Remind groups to select a reporter and to prepare flip charts for presenting their reports.

**11. Close this session.**

## SESSION VIII

### IMPLEMENTATION PLANNING — PART II

---

#### ***PURPOSE***

To present and discuss reports on outputs and indicators.

#### ***MATERIALS***

None

#### ***PREPARATION***

None

#### ***TIME***

1½-2 hours (depending on number of small groups reporting out)

#### ***PROCESS***

1. Explain the purpose of the session.

Explain that each group will have 20 minutes to report out on their progress. Explain that after each group presents, there will be a brief (10 minute) period for asking questions. After all have presented, there will be a longer discussion.

2. Ask each group to present, using a summary of their group's work on flip chart paper.

3. After all have presented, begin a discussion with the following questions:

- ✓ What was helpful about this process?
- ✓ What was most difficult?
- ✓ What have you learned that you will be able to apply in your own project situations?

Other questions or comments?

4. Close this session.

## SESSION IX

### DETERMINING INPUTS

---

#### **PURPOSE**

To identify project inputs needed to create the desired outputs (objectives).

#### **MATERIALS**

*Force Field Analysis Worksheet* (see Appendix C, Handout #19)

#### **PREPARATION**

Make copies of the *Force Field Analysis Worksheet* (one per participant)

#### **TIME**

1½ hours

#### **PROCESS**

1. Introduce the session by explaining that the only box still empty on their Project Amendment Worksheet is INPUTS.

Explain that they will work in project groups to look back over the workshop and what they have included in their Contextual Analysis worksheets and Project Amendment Worksheets to determine what is needed to achieve desired outputs.

2. A useful planning tool which will help to identify inputs is force field analysis. Explain that this technique was developed to help individuals or groups to do a more complete analysis of a problem situation so that the solutions selected might have a higher probability of success.

Distribute and explain the Force Field Analysis Worksheet. Explain that...

- ✓ any change has both supporting and restraining forces.
- ✓ these forces exist within one's self, in others, and in the organizations involved.
- ✓ resources -- available and needed -- must be identified and strengthened in order to bring about desired change.

3. Explain that FORCE FIELD ANALYSIS is helpful in the planning process because the RESOURCES become the INPUTS to the project.
4. Explain that groups will have 45 minutes to conduct a FORCE FIELD ANALYSIS on one or more project objectives to identify project INPUTS.

Each group should note their inputs on flip chart paper (or on their flip-chart size Project Amendment Worksheet) and prepare for a 5-minute report.

5. After 45 minutes, ask each group to report out.

After all are finished, begin a discussion with the following questions:

- ✓ What do the inputs have in common?
- ✓ Will they help to achieve desired outputs?
- ✓ What categories of inputs are evident?
- ✓ Are significant inputs missing?
- ✓ How has this last piece been helpful?

Was it difficult? Why or why not?

6. Close this session.

## SESSION X

### NEXT STEPS: PERSONAL ACTION PLANS

---

#### ***PURPOSE***

To develop a personal action plan for applying learning from this workshop.

#### ***MATERIALS***

*Next Steps Plan Worksheet* (see Appendix C, Handout #20)

#### ***PREPARATION***

Make copies of the *Next Steps Plan Worksheet* (one per participant)

#### ***TIME***

1 hour

#### ***PROCESS***

1. Explain that during this session participants will create a "next steps" plan for themselves so that when they return to their workplace they will be ready to take action to implement their learning from this workshop.
2. Distribute and explain the Next Steps Plan Worksheet. Suggest that each person complete the worksheet then find a partner to discuss it with. (Tell them to just look around and find someone else who is finished.) Explain that they will have 30 minutes to complete and discuss their work plans.

After all have finished, ask for volunteers to share some of the actions which they plan to take upon return to the workplace. (Don't force anyone to speak, and all need not give an example. A few contributions will suffice).

3. Close this session.

## SESSION XI

# WORKSHOP CLOSING AND FEEDBACK

---

### **PURPOSE**

To provide closure for the workshop and have participants offer feedback on the experience.

### **MATERIALS**

*Feedback Form*, (see Appendix C, Handout #21)

### **PREPARATION**

Make copies of the *Feedback Form* (one per participant)

### **TIME**

30-45 minutes

### **PROCESS**

1. Suggest that in order to sustain their energy and skill in using their learning from the workshop, participants may wish to meet periodically. For example, the sponsoring organization could suggest a regular "brown-bag" lunch or some other method to reinforce continued support and interaction.
2. Ask participants to think back to the morning of the first day when they were asked what they could do as change agents to strengthen gender considerations in their [KEY AREA] projects.

Ask them to once again ask themselves that question and note their responses now, at the end of the workshop (5 minutes).

After 5 minutes ask for some of the ideas people have noted, and note these on the flip chart. Add the following if they don't come up with them:

- ✓ *act as a catalyst*
- ✓ *present alternatives*
- ✓ *educate*
- ✓ *raise questions*

Ask participants how their responses now differ from those at the beginning.

3. Next, ask each participant to take a few minutes to reflect on the workshop and to identify one important thing they learned that they

believe will be useful to them in their day-to-day work. Have each person state this in the plenary session.

4. Tell participants that evaluating this work is very important to you as facilitator, that you will use their comments to continuously update and improve the workshop. Distribute the evaluation form and give participants time to complete it and turn it in to you.
5. Thank participants for their hard work, acknowledge any additional helpers you used before and during the workshop. Close with a simple farewell and the offer of continuing support in their efforts.

APPENDIX A

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*Flip Charts*

## Workshop objectives



### Goal

Develop technical skills to support the full integration of gender and women in development concerns into [KEY AREA] programs and projects

### Objectives

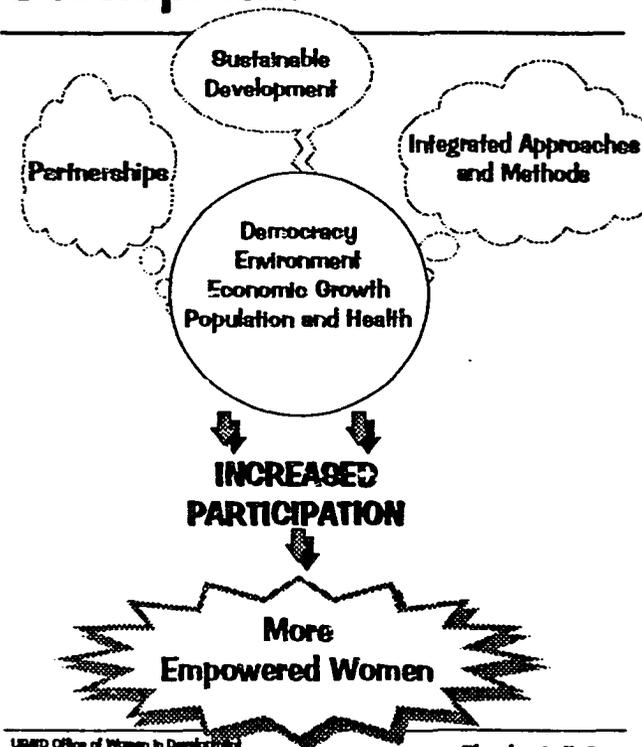
The workshop will provide opportunities for analysis-based training and experience in planning, management and administration of projects to...

- ✓ improve participants' understanding of the effects of gender differences on the design and delivery of [KEY AREA] programs and projects
- ✓ enable participants to include gender-sensitive objectives in planning, managing and evaluating programs and projects; and
- ✓ produce work plans for implementing the objectives of their programs and projects

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Flipchart # 1

## Approaching Development



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The GENEYS Project

Flipchart # 2

## Democracy



### USAID will support...

- ◆ constitutional mechanisms
- ◆ democratically elected legislatures
- ◆ legal systems
- ◆ local government entities
- ◆ credible and effective elections
- ◆ local, national, regional, and international organizations that protect human rights
- ◆ trade unions, professional associations, women's groups, educational entities, and a wide range of indigenous NGOs
- ◆ political parties and other national mechanisms of political expression
- ◆ independent media outlets
- ◆ improved civil-military relations
- ◆ institutions and organizations that increase government responsiveness and accountability
- ◆ educational efforts for children and adults

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The GENESIS Project

Flipchart # 3

## Women in Development



**"The essence of a Women in Development approach is to ascertain what women actually want and do within a society and provide them with opportunities and skills and resources to enhance that participation.... [T]he WID strategy rests on creating more rational and evenhanded planning which takes into account the sex division of labor, fair returns for labor, and the equitable infusion of new opportunities and resources to all members of a given community."**

• Kathleen Staudt  
*Women, Foreign Assistance and Advocacy Administration*

USAID Office of Women in Development  
The GENESIS Project

Flipchart # 4

## WID and GAD: What's the Difference



Although the critical distinction between sex and gender is well known, the further distinction between Women in Development (WID) and Gender and Development (GAD) is less clear.

### WID

The WID approach...is based on the underlying rationale that development processes would proceed much better if women were fully incorporated into them (instead of being left to use their time 'unproductively').

### GAD

In contrast, the GAD approach maintains that to focus on women in isolation is to ignore the real problem, which remains their subordinate status to men.

Caroline O.N. Moser  
*Gender planning and development*

UNEP Office of Women in Development  
The GENESTB Project

Flipchart # 5

## Gender and Development



"I understand the concept of gender to be a system of socially ascribed roles and relationships between men and women, which are determined not by biology but by the social, political and economic context. Gender roles are learned and they can change over time. It is the analysis of these roles and relationships which shows the imbalances in power, wealth and workload between women and men, and it is this analysis which may then lead to the *possibilities and necessity* of change."

- Jan Beed

UNEP Office of Women in Development  
The GENESTB Project

Flipchart # 6

## The Gender Dimension of Development



- ◆ Is about both what men and women do
- ◆ Looks at the impact of development on both men and women, and their impact on development
- ◆ Seeks to see that both men and women participate and benefit equally from development
- ◆ Recognizes that women may be involved in development, but may not necessarily benefit
- ◆ Seeks to understand the root causes of gender inequality and addresses itself to these causes
- ◆ Emphasizes gender relationships and focuses on the reduction of disparities
- ◆ Emphasizes equality of benefit and control
- ◆ Recognizes the need to look at equity of impact
- ◆ Not concerned with women per se, but with social construction of gender and assignment of specific rights, roles, responsibilities and expectations to women and men
- ◆ Addresses the inter-relationship between gender roles, access to and control of resources and power

## Performance Measurement



- ◆ Objectively Verifiable Indicators...
  - ❖ are conditions that signal success
  - ❖ force us to clarify what we mean by our objectives
  - ❖ provide an objective basis for monitoring and evaluating
  - ❖ have the following four attributes:
    - ◆ Plausible
      - ✓ measures what is important in a project (not what is easy)
      - ✓ measures changes attributable to the project
    - ◆ Independent
      - ✓ don't use indicators at one level to measure success at another
    - ◆ Targeted
      - ✓ Levels of achievement must be specifically defined
      - ✓ how much? (quantity)
      - ✓ how well? (quality)
      - ✓ by when? (time)
    - ◆ Objectively Verifiable

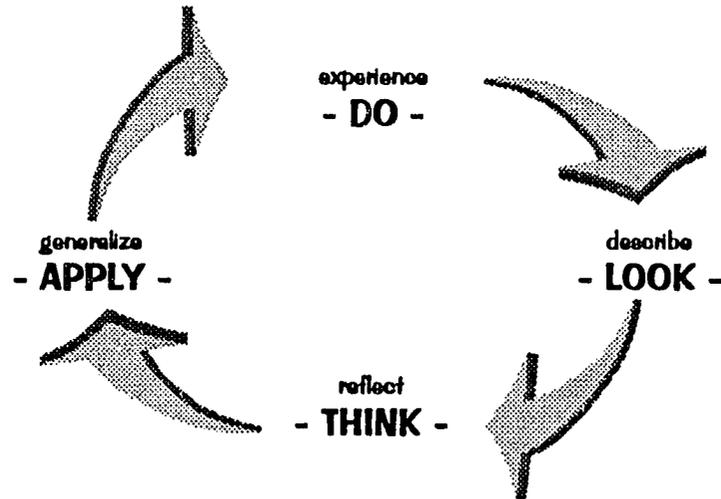
## APPENDIX B

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# *Overheads*

Facilitator's Note: The following overheads have been duplicated two-to-a-page in an effort to conserve paper. Each should be enlarged x2 when copied on transparency film for use on an overhead projector.

## Experiential Learning Model



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Overhead # 1

## WORKSHOP NORMS

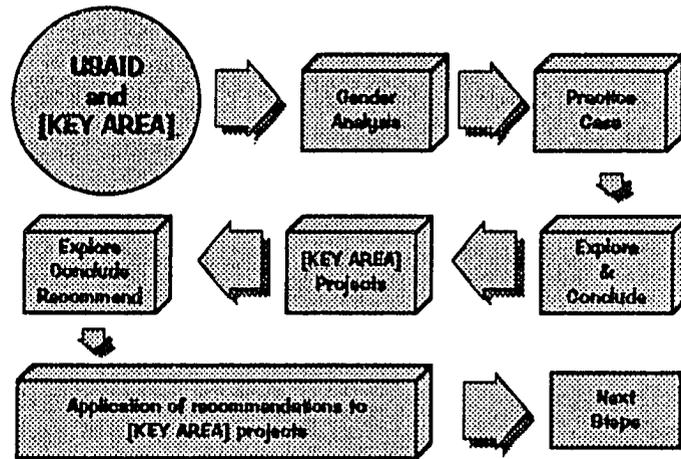


- ◆ Attendance at all sessions
- ◆ Start/end all sessions on time
- ◆ Active participation by all
- ◆ One person speaks at a time
- ◆ Mutual respect for others' ideas
- ◆ Have fun while working
- ◆ No smoking

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Overhead # 2

## Workshop Logic Map



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Overhead # 3

## Measuring Results

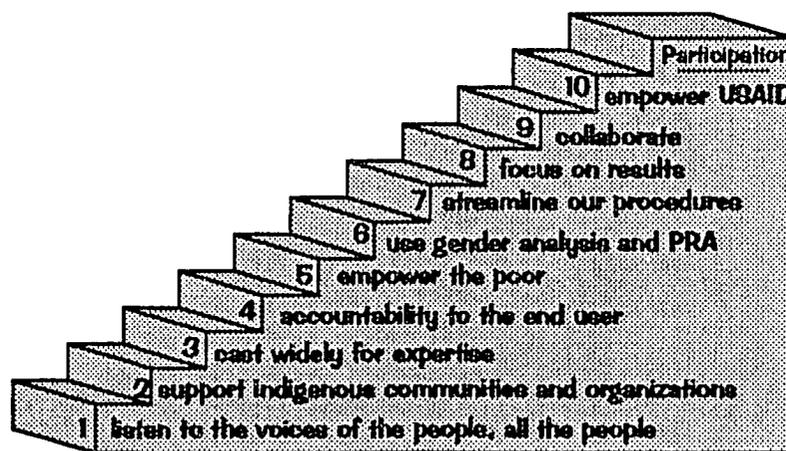


- ◆ The success of foreign assistance is determined by its impact on developing nations
- ◆ USAID will ask how projects actually affect the way people live. This demanding process...
  - ❖ will ask how projects and programs achieve discrete, agreed objectives
  - ❖ will focus on distinguishing self-sustaining accomplishments from ephemeral ones
  - ❖ obligates people to work as a team in designing, implementing, and evaluating projects and programs
  - ❖ demands communication and cooperation, especially with the citizens of developing countries

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Overhead # 4

## Participatory Development: Guiding Principles



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Overhead # 5

## The USAID Path



- ⊙ All sustainable democracies share certain fundamental characteristics: respect for human and civil rights, peaceful competition for political power, free and fair elections, respect for the rule of law, accountable government and an environment that encourages participation by all sectors of the population.

But, there are

*impediments*

to the development of these characteristics

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Overhead # 6

## Why Bother?



**"For the simple reason that it makes sense. Development projects that ignore 50 percent of the economically active population will not lead to development, much less equitable development."**

*~ Mohini Malhotra*

*Why Bother With That Gender Issue?*

**"For the even simpler reason that it is the right thing to do."**

*~ Me and many others*

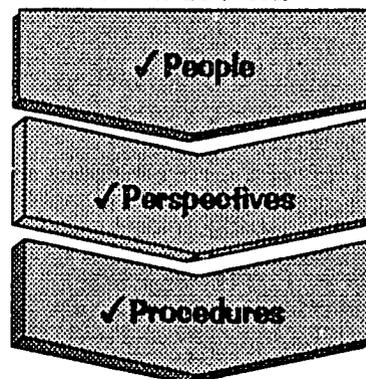
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Overhead # 7

## Gender Dimensions of Development - How?



**Use training, technical assistance, communications, and research to influence...**



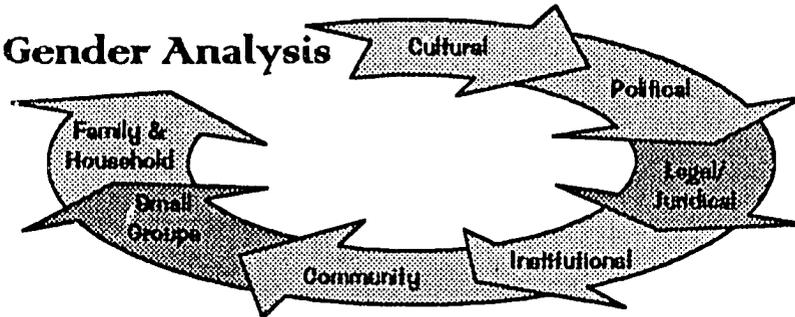
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Overhead # 8

## Contextual Analysis of Gender and Social and Economic Issues



### Gender Analysis



Constraints to and opportunities for gender equity in the development process exist in a context of multiple levels of social and economic systems. Analysis of these constraints and opportunities must occur at all levels of that context in order to define feasible steps toward change.

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Overhead # 9

## Contextual Analysis



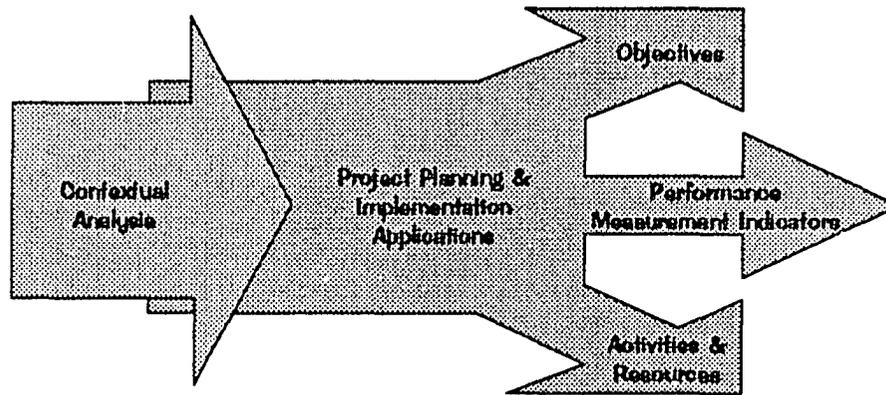
### ◆ Exploring the multiple levels of social and economic systems is key. Gender analysis looks at:

- ◆ issues at the cultural, political, legal/judicial, institutional, community, small group, and family and household levels: this helps us to clarify components of an equity problem related to gender, age, ethnicity, or race
- ◆ identify assumptions that exist about the problem
- ◆ test those assumptions
- ◆ specify change needed to achieve development objectives
- ◆ articulate specific constraints to change
- ◆ define opportunities for change
- ◆ develop specific steps for action

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Overhead # 10

# "Actions" to ACTION



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Overhead # 11

## Nature of Objectives

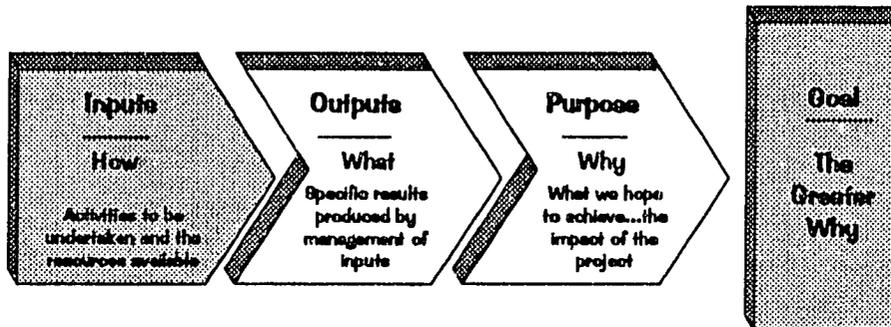


- ◆ **What they are...**
  - ❖ expected accomplishments
  - ❖ projected achievements
  - ❖ intended targets
- ◆ **What they are not...**
  - ❖ assignments
  - ❖ tasks
  - ❖ activities

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Overhead # 12

# Hierarchy of Expectations

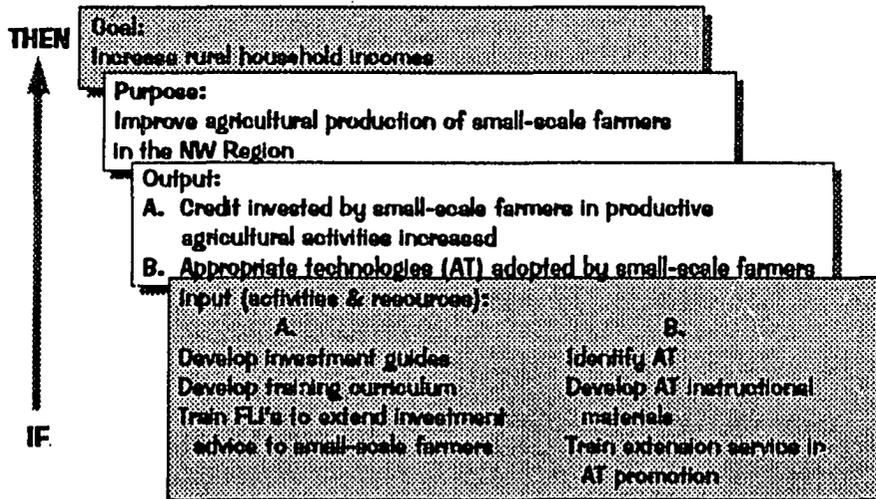


**IF** (Cause) → **THEN** (Effect)

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Overhead # 13

# Making a Project's If-Then Relationship Explicit Improves the Project



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Overhead # 14

# Project Planning and Implementation Framework



THEN



IF

Project Expectations	Indicators	Means of Verification
<p><b>Goal:</b> What is the overall reason for the project? To what national or regional program objectives will the project contribute?</p>	<p>What indicators will signal achievement of the goal?</p>	<p>Specific source of data and method of obtaining it.</p>
<p><b>Purpose:</b> Briefly state what the project is expected to achieve, if completed successfully and on schedule.</p>	<p>Describe the conditions or situation which will exist when the project achieves its stated purpose -- i.e., end-of-project status.</p>	<p>What are the types and sources of evidence to be used in verifying the condition or situation.</p>
<p><b>Outputs:</b> What are the major kinds of results that can be expected from good management of the inputs?</p>	<p>What are the specific indicators for each of the planned outputs -- i.e., how much of what, for whom, by when?</p>	<p>What are the specific sources of data for each of the indicators, and how are the data going to be obtained?</p>
<p><b>Inputs:</b> What are the key activities and resources?</p>	<p>For each category of inputs, identify the quantity and/or dollar value, by year (budget).</p>	<p>Specify source documents (e.g., records, reports).</p>

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The DEMEYS Project

Overhead # 15

APPENDIX C

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*Handouts, Forms, and  
Worksheets*

# Correlates to Democratic Governance



- 
- ✓ economic development
  - ✓ social changes and improvements (e.g., declining infant mortality)
  - ✓ corruption
  - ✓ religious tradition
  - ✓ tribalism, racism, ethnocentrism
  - ✓ education
  - ✓ civil society (i.e., private sector institutions such as trade unions, business associations, civic and women's organizations, youth groups and cooperatives)
  - ✓ history of democracy
  - ✓ acceptance by the citizenry of a set of rules which are predictable, widely accepted, and considered authoritative (rule of law)
  - ✓ viable political parties
  - ✓ free, open, and fair elections
  - ✓ civilian control of the military
  - ✓ freedom of expression

# Correlates to Economic Growth



- 
- ✓ appropriate policy environment
  - ✓ strong economic and political institutions (good governance)
  - ✓ export incentives
  - ✓ inefficient import substitution and unwarranted protection
  - ✓ investment and savings
  - ✓ appropriate production technologies
  - ✓ education and health services
  - ✓ technical and business skills
  - ✓ healthy market economy and financial markets
  - ✓ market-oriented pricing and trading policies
  - ✓ access to inputs, including land
  - ✓ favorable labor conditions and worker rights
  - ✓ infrastructure, including storage and transport
  - ✓ privatization of state-owned enterprises
  - ✓ support for microenterprises and small businesses

# Correlates to Environment



- 
- ✓ favorable policy framework
  - ✓ environmental laws and regulations
  - ✓ agricultural and land-use practices
  - ✓ soil and water conservation
  - ✓ resource management practices
  - ✓ clean air and water
  - ✓ protection of biodiversity
  - ✓ resource depletion
  - ✓ public institutions that monitor and facilitate sustainable use of resources
  - ✓ greenhouse gas emissions
  - ✓ renewable energy technologies
  - ✓ exploitation of forests, wetlands, coastal zones, and other ecosystems

# Correlates to Population and Health

---



- ✓ favorable policy environment
- ✓ fertility rates
- ✓ infant, child and maternal mortality
- ✓ family planning and health services
- ✓ gender gaps in education
- ✓ STDs, including HIV/AIDS
- ✓ immunization programs, particularly for infants and children
- ✓ disease control and nutrition programs
- ✓ social marketing of contraceptives and public education campaigns
- ✓ empowerment of women

# Gender and Development



- ◆ Is about both what men and women do
- ◆ Looks at the impact of development on both men and women, and their impact on development
- ◆ Seeks to see that both men and women participate and benefit equally from development
- ◆ Recognizes that women may be involved in development, but may not necessarily benefit
- ◆ Seeks to understand the root causes of gender inequality and addresses itself to these causes
- ◆ Emphasizes gender relationships and focuses on the reduction of disparities
- ◆ Emphasizes equality of benefit and control
- ◆ Recognizes the need to look at equity of impact
- ◆ Not concerned with women per se, but with social construction of gender and assignment of specific rights, roles, responsibilities and expectations to women and men
- ◆ Addresses the inter-relationship between gender roles, access to and control of resources and power

# USAID and Gender: *Key Dates*



- 
- ◆ **1973 - Percy Amendment to Foreign Assistance Act established a mandate**
  - ◆ **1974 - Established USAID's Office of Women in Development**
  - ◆ **1987 - Two evaluations showed:**
    - ❖ **Limited Progress: considerable work was needed**
    - ❖ **As a result - Congress funded an earmark for training, technical assistance, new programs**
  - ◆ **1988 - New Legislation sustained the mandate**
  - ◆ **1993 - New Administration increases support...**

# Features of Current Legislation

---



- ◆ Incorporate women as beneficiaries of and contributors to development activities at the level proportionate to their participation in the sector or to their representation in the total population, whichever proportion is higher.
- ◆ Ensure that A.I.D.'s documents explicitly describe strategies to involve women, identify benefits and impediments to women's participation in development, and establish benchmarks to measure women's participation in and benefits from development.
- ◆ Collect sex-disaggregated data in all its research and data gathering activities.
- ◆ Increase training opportunities for women from all regions and make necessary provision in its training programs for addressing the specific needs of women.
- ◆ Include in project and program evaluations an assessment of the extent to which women are being integrated into the development process and the impact of such project or program on enhancing the self-reliance of women and improving their incomes.
- ◆ Incorporate to the maximum extent possible the active participation of local women and local women's organizations in all programs, projects, and activities carried out by A.I.D. or its contractors.

**Summary Sheet for the Contextual Analysis of Gender Issues**

<b>Context</b>	<b>Issue of Gender, Age, Ethnicity or Race</b>	<b>Assumptions Existing About Issue &amp; How to Test These</b>	<b>Change Needed to Achieve Development Objectives</b>	<b>Opportunities for and Constraints to Change</b>	<b>Recommended Actions</b>
<b>Cultural</b>					
<b>Political</b>					
<b>Legal/Juridical</b>					
<b>Institutional</b>					
<b>Community</b>					
<b>Small Groups</b>					
<b>Family/ Household</b>					

Handout #8

18

Basic Gender, Age, Ethnicity or Race Equity Issue		
Cultural Component	<i>Social</i>	<i>Economic</i>
Issues at the cultural level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		

<b>Basic Gender, Age, Ethnicity or Race Equity Issue</b>		
<b>Political Component</b>	<i>Social</i>	<i>Economic</i>
Issues at the political level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		



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Basic Gender, Age, Ethnicity or Race Equity Issue		
Legal/juridical Component	<i>Social</i>	<i>Economic</i>
Issues at the legal/juridical level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		

<b>Basic Gender, Age, Ethnicity or Race Equity Issue</b>		
<b>Institutional Component</b>	<i>Social</i>	<i>Economic</i>
Issues at the institutional level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		



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Basic Gender, Age, Ethnicity or Race Equity Issue		
Community Component	<i>Social</i>	<i>Economic</i>
Issues at the community level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		

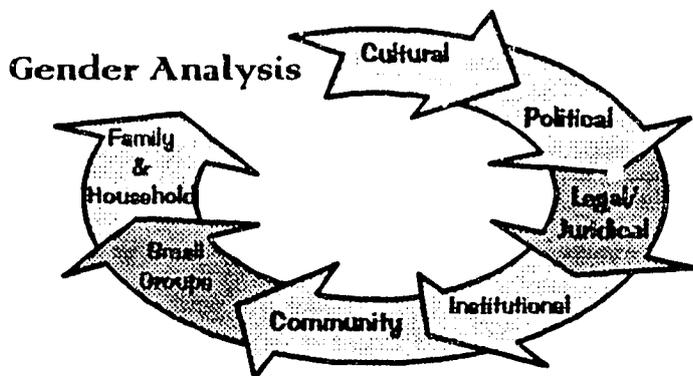
<b>Basic Gender, Age, Ethnicity or Race Equity Issue</b>		
<b>Small Group Component</b>	<i>Social</i>	<i>Economic</i>
Issues at the small group level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		

18

JP

Basic Gender, Age, Ethnicity or Race Equity Issue		
Family and Household Component	<i>Social</i>	<i>Economic</i>
Issues at the family and household level		
Assumptions about the problem		
Information to test assumptions		
Change needed to achieve development objectives		
Specific constraints to change		
Specific opportunities for change		
Specific steps for action		

# Tips for Conducting Contextual Gender Analysis



Here are six tips for conducting contextual gender analysis in the planning of development activities. The purpose of the analysis is to offer a deeper understanding of the context in which development activities occur, to the extent that any changes necessary to achieve development objectives are uncovered.

**Tip #1**

Be careful that you don't let the grid's different levels (e.g., cultural, political, legal/judicial) drive your analysis; i.e., you don't have to fill in all of the boxes, only those which apply.

Context	Issue	Assumptions	Change
Cultural			
Political			
Legal/Judicial			
Institutional			
Community			
Small Group			
Family/Household			

The first step is to examine the issue to determine its different components. Then situate these components at the level(s) where they occur and refine the specific aspects of the issue.

The analysis should be driven by the gender issues you identify as possibly hindering the achievement of your project's development objectives. The issues which you enter on your grid should come from this understanding, not concocted to correspond to a certain level on the grid. In other words, don't feel compelled to fill in all the boxes of the grid.

Some contextual levels (i.e., rows on the grid) may be left

blank because there may not be a gender issue on this level relevant to your project's objectives. This is O.K.! Usually, the more legitimate blanks on the grid, the fewer actions will be required to achieve your project's objectives.

This should be viewed as a reductive analysis that will help you to identify those few subsequent actions that are necessary and sufficient to instigate the desired change. You are not developing an exhaustive list of all gender issues and actions possible, as many of these would either not be relevant to meeting the project's objectives or within the manageable interest of the project to treat.

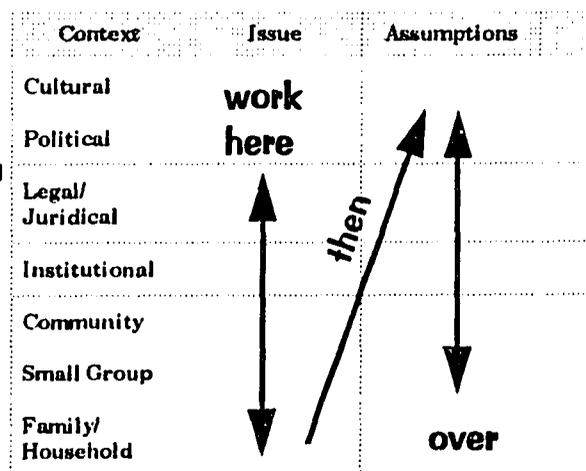
*Tip #2*

The same gender issue may be reflected on more than one contextual level, suggesting several actions necessary and sufficient to instigate the desired change.

For example, in an agriculture production project in sub-Saharan Africa which targets small scale farmers (most of whom are women) for increased credit and extension services, women's lack of access to credit may be both a legal/juridical issue (wherein laws relegating women to the status of legal minors may prevent them from applying for credit) and an institutional issue (wherein formal credit institutions don't have the skills to appropriately extend credit to women). The former might suggest actions at the policy dialogue level to change legislation; the latter suggesting actions to build financial institution capacity to extend loans to women.

With issues that are multi-faceted or complex, as in the example given, you might begin by brainstorming facets of the issue before filling in the grid. Reviewing your brainstorm list, you can then further define these facets and assign them to their appropriate levels.

There is considerable economy in working completely through the first column, to establish all the facets of an issue, before moving on to assumptions and the remaining columns. Your analysis becomes more definitive, and redundancies are avoided.



# Tip #3

Your analysis will be less effective if you enter suppositions or vague information.

Context	Issue	Assumptions
Cultural	women don't need access to credit	men get credit, pass it on to women
Political		
Legal/Judicial		
Institutional	formal lending institutions do not lend to women	??
Community		
Small Group		

If you find that you don't have enough information to fill in parts of the contextual analysis matrix, or are unsure of an entry, it may be more useful to formulate a question to be answered later when more data are available.

Your first attempt at contextual analysis may identify more questions than answers; this is one of the values of the analysis.

# Tip #4

Exploring assumptions helps to clarify the root causes of the issue under consideration.

Context	Issue	Assumptions	Change
Cultural	women don't need access to credit	men get credit, pass it on to women	

Uncovering the assumptions (i.e., root causes) about the issue may be the hardest part of the analysis. However, this is a VERY important step! Without this information you risk jumping from the issue to the desired change without sufficient clarity as to why the issue persists.

Understanding the assumptions that "explain" the issue at each socio-economic level of the contextual analysis will help you to identify more incisive desired changes.

Institutional	formal lending institutions do not lend to women	formal lending institutions' credit applications in national language, most women don't know	translate credit applications into local dialects
---------------	--	--	---

Tip #5

Identifying significant constraints to desired change is important before considering the actions you would take to achieve change.

no \$\$, culturally taboo



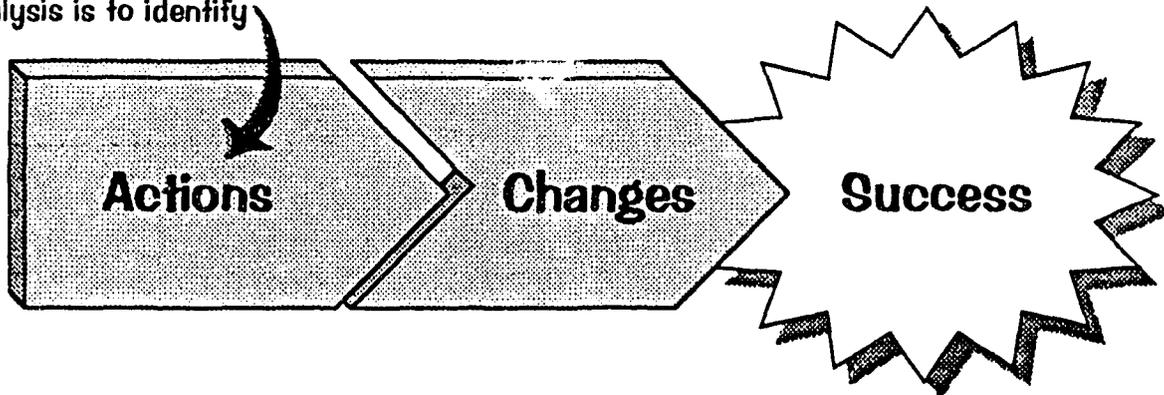
Constraints such as "limited resources" and "traditions" are often deadends, meaning that no project actions to counteract or neutralize them are possible. It is important to be realistic about these when considering the degree to which you can mitigate the constraints to your desired changes.

Tip #6

The actions that you identify should readily lend themselves to being included as output objectives in your development strategy.

If you expect to show measurable progress towards meeting your objectives within the life span of your development activity, you should consider only those actions that are manageable, realistic, and sufficient to show appreciable change.

Remember, the purpose of this analysis is to identify



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# Definitions for Project Planning and Performance Monitoring



---

<b>Project</b>	A project is the sum of all the actions taken by organization in pursuit of a given purpose.
<b>Goal</b>	The higher order and longer term objective to the organization's project contributes.
<b>Purpose</b>	The highest level objective on which an organi project activities can be expected to have a me impact during the life-of-project. A purpose is: <ul style="list-style-type: none"><li>✓ within the manageable interest of the organization</li><li>✓ focus is on results, not action</li><li>✓ can be measured by performance indica</li><li>✓ time bound</li><li>✓ specific</li></ul>
<b>Project Outputs</b>	The major accomplishments for which an orga is willing to assume direct responsibility in its to achieve the project purpose. They have the attributes as the purpose.
<b>Project Inputs</b>	The activities and resources provided to produ project outputs that in turn contribute to achie the project purpose.
<b>Performance Measurement Indicators</b>	Criteria for determining and/or assessing prog the attainment of project outputs.
<b>Performance Monitoring System</b>	An institutionalized system for collecting and reporting program performance data on a peri (usually annual) basis.

13

64

# Project Amendment Worksheet

Project: \_\_\_\_\_



**THEN**



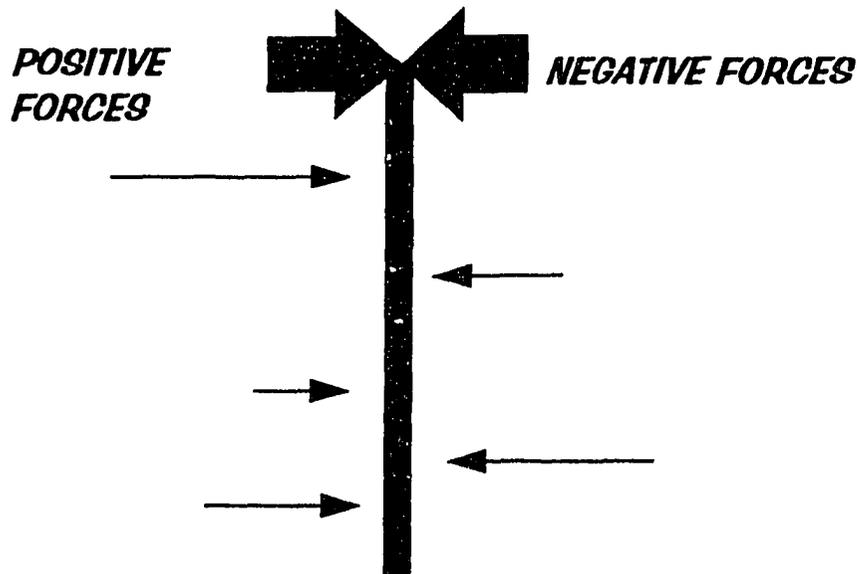
**IF**

Project Expectations	Indicators	Means of Verification
Goal:		
Purpose:	End-of-Project Status:	
Outputs:		
Inputs:		

# Force Field Analysis Worksheet



State the expected objective:



Resources required to meet the expected objective:

20

# Next Steps Plan Worksheet



◆ Problem/issue

◆ Objective

◆ Actions to be taken	by when	by whom
◆		
◆		
◆		
◆		
◆		
◆		

◆ Resources needed

**Gender [KEY AREA]**

[LOCATION]

[DATES]

***Feedback Form***

What I learned most in the workshop is...

What I still need to learn more of is...

What I will have difficulty in applying is...

My overall feelings about the workshop are...

If I were asked by a close colleague how I saw this workshop, I would say...

Handout #21

97'

APPENDIX D

---

*Other Agendas*

## **TWO DAY WORKSHOP**

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### *Day One*

Introduction	1½	hours
Setting the Context	1	hour
Introduction to Gender Analysis	½	hour
Gender Analysis: Contextual Analysis	½	hour

lunch

Contextual Analysis (continued)	2	hours
Gender Analysis: Practical Applications	2	hours

### *Day Two*

Gender Analysis: Practical Applications (continued)	1	hour
Implementation Planning (including inputs)	3	hours

lunch

Implementation Planning (continued)	1	hour
Next Steps: Personal Action Plans	1	hour
Closing and Feedback	½	hour

## **ONE DAY WORKSHOP**

---

Introduction	1	hour
Setting the Context	1	hour
Gender Analysis: Contextual Analysis	2	hours

lunch

Gender Analysis: Practical Application	3	hours
Implementation Planning	1	hour
Next Steps & Feedback on the Day	½	hour

APPENDIX E

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*✂ for Session III*

## ***ECONOMIC GROWTH***

Substitute the following steps when the workshop is focusing on economic growth.

15. Post the following Supplemental Overhead #1 (or use flipchart):

Ask participants to reflect upon their own experiences and note down some impediments they are aware of to this path of encouraging broad-based economic growth.

### **The USAID Path**



---

**○ USAID's fundamental goal is to help individuals in developing nations to improve the quality of their own lives and share equitably in the benefits of economic growth.**

But, there are  
***impediments***  
to such development.

---

USAID Office of Women in Development  
The GENESIS Project **Supplemental Overhead # 1**

Ask for some ideas. Note responses on flipchart. Add some of the following if not mentioned:

- ✓ *inappropriate or absent policies*
- ✓ *absent or weak intermediary institutions*
- ✓ *political conflict*
- ✓ *ethnic divisiveness*
- ✓ *inadequate education and health services*
- ✓ *weak and inefficient market structure*

- ✓ *poor investments and savings*
- ✓ *lacking appropriate technologies*
- ✓ *lack of experience*
- ✓ *inability of some groups, including women, to obtain needed credit*

**Highlight the inability of some groups to obtain credit and how attending to gender concerns and issues can help ease this constraint.**

16. Finally, show Supplemental Flipchart #1 or overhead of activities and actions USAID will support under this priority.

17. In closing this part of the activity, briefly refer to or review the key pieces of posted flipchart (from Steps 5-16). Ask for and respond to questions.

18. Link to next session by explaining that we will be building upon this overview of USAID's strategy and priorities for development assistance by examining some of the correlates related to [KEY AREA] projects.

19. Close the session.

## Economic Growth

---

**USAID will support...**

- ◆ strengthen markets
  - ◆ help build governance and local empowerment
  - ◆ help leaders in building indigenous institutions and developing policies that:
    - ◆ promote openness to trade and investment
    - ◆ support agriculture and rural enterprise
    - ◆ strengthen urban infrastructure and delivery of services
    - ◆ provide adequate incentives for exports
    - ◆ reinforce the effectiveness and transparency of fiscal and monetary policy and regulations
    - ◆ avoid inefficient import substitution and unwarranted protection
    - ◆ strengthen the enabling environment for development of the private sector
- ◆ expanded access and opportunity:
  - ◆ simplify regulatory procedures and increase access to markets and technology
  - ◆ increase access to capital through cooperatives, village and neighborhood banks
  - ◆ develop leaders and other self-sustaining financial institutions that service small business and borrowers
  - ◆ expand and safeguard human and worker rights
- ◆ investments in people
  - ◆ education programs with emphasis on the quality and availability of primary education
  - ◆ targeted, market-oriented interventions aimed at technical and vocational training, the free flow of technology and technical information, and training in business skills
  - ◆ creation or improvement of systems providing health care
- ◆ nongovernmental organizations
- ◆ women's organizations

---

USAID Office of Women in Development  
The GENIEYS Project

**Supplemental Flipchart # 1**

## **THE ENVIRONMENT**

Substitute the following steps when the workshop is focusing on the environment.

15. Post the following Supplemental Overhead #2 (or use flipchart):

Ask participants to reflect upon their own experiences and note down some impediments they are aware of to this path of encouraging the environment.

### **The USAID Path**



● **USAID will pursue two strategic goals:**

- ① **reducing long-term threats to the global environment, particularly loss of biodiversity and climate change; and,**
- ② **promoting sustainable economic growth locally, nationally, and regionally by addressing environmental, economic, and developmental practices that impede development and are unsustainable.**

But, there are

## **impediments**

to such development.

---

USAID Office of Women in Development  
The GEMWYS Project Supplemental Overhead # 2

Ask for some ideas. Note responses on flipchart. Add some of the following if not mentioned:

- ✓ *lack of education (for men and women)*
- ✓ *antiquated or inappropriate technologies*
- ✓ *local regulatory environment*
- ✓ *absence of economic and social incentives to protect the environment*

---

**Highlight the importance of considering gender when addressing these impediments.**

---

16. Finally, show Supplemental Flipchart #2 (or overhead) of activities and actions USAID will support under this priority:

17. In closing this part of the activity, briefly refer to or review the key pieces of posted flipchart (from Steps 5-16). Ask for and respond to questions.

18. Link to next session by explaining that we will be building upon this overview of USAID's strategy and priorities for development assistance by examining some of the correlates related to [KEY AREA] projects.

19. Close the session.

## Environment

---

**USAID will support country strategies which include assessments and support of...**

- ◆ **improving agricultural, industrial, and natural resource management practices**
  - ◆ soil and water conservation
  - ◆ reducing industrial- and energy-related environmental degradation
  - ◆ reducing rural and urban land-use problems
- ◆ **strengthening public policies and institutions to protect the environment through**
  - ◆ reform of national economic development strategies and policies
  - ◆ development of a comprehensive environmental policy framework
  - ◆ improved enforcement of environmental laws and regulations
  - ◆ creation or strengthening of competent environmental institutions
  - ◆ creation of environmental data bases and natural resource inventories
- ◆ **bilateral and multilateral interventions**
  - ◆ dialogue with governments on environmental regulations, natural resource use, energy pricing policies
  - ◆ dialogue with international agencies on environmental impact of lending practices, design and implementation of innovative mechanisms to support environmental work
    - ◆ e.g., trust funds, endowments
- ◆ **research and education on**
  - ◆ non-capital intensive elements of technology transfer
  - ◆ institutional cooperation, scientific exchanges, development of human resources, policy development
  - ◆ public education on issues affecting the environment

---

USAID Office of Intern. In Development  
The GENESIS Project **Supplemental Flipchart # 2**

## HEALTH AND POPULATION

Substitute the following steps when the workshop is focusing on health and population.

15. Post the following Supplemental Overhead #3 (or use flipchart):

Ask participants to reflect upon their own experiences and note down some impediments they are aware of to this path of encouraging improvements in population and health.

### The USAID Path

---

○ USAID's goal in this key area is to contribute to a cooperative global effort to stabilize world population growth and support women's reproductive rights...this effort should result in a total world population of between 8 billion and 9 billion by the year 2025, and less than 10 billion by the year 2050, with very low growth thereafter.

But, there are  
***impediments***  
to such development.

---

USAID Office of Women in Development  
The GENIEYS Project Supplemental Overhead # 3

Ask for some ideas. Note responses on flipchart. Add some of the following if not mentioned:

- ✓ *oppression of women and minorities by expanding populations*
- ✓ *lack of education (or significant gender gaps in education)*
- ✓ *antiquated or inappropriate education and economic frameworks resulting from population pressures*
- ✓ *HIV/AIDS epidemic*

- ✓ *social and cultural outlooks regarding family planning*
- ✓ *social and cultural outlooks that diminish the worth of women and impede their empowerment*

---

**Highlight the crucial role of women *and men* in this priority area and the importance of considering gender when addressing these impediments.**

---

16. Finally, show Supplemental Flipchart #3 (or overhead) of activities and actions USAID will support under this priority:

17. In closing this part of the activity, briefly refer to or review the key pieces of posted flipchart (from Steps 5-16). Ask for and respond to questions.

18. Link to next session by explaining that we will be building upon this overview of USAID's strategy and priorities for development assistance by examining some of the correlates related to [KEY AREA] projects.

19. Close the session.

**Population and Health** 

---

**USAID will support...**

- ◆ **voluntary family planning systems**
- ◆ **reproductive health care**
- ◆ **the particular needs of adolescents and young adults**
- ◆ **infant and child care**
- ◆ **education for girls and women**

---

USAID Office of Women in Development  
The GENETIC Project
Supplemental Flipchart # 3

*Supplemental  
Flipcharts  
and  
Overheads*

## Economic Growth

### USAID will support...

- ◆ strengthened markets
  - ◆ improved governance and local empowerment
  - ◆ host nations in building indigenous institutions and developing policies that:
    - ◇ promote openness to trade and investment
    - ◇ support agriculture and rural enterprises
    - ◇ strengthen urban infrastructure and delivery of services
    - ◇ provide adequate incentives for exports
    - ◇ reinforce the effectiveness and transparency of fiscal and monetary policy and regulations
    - ◇ avoid inefficient import substitution and unwarranted protection
    - ◇ strengthen the enabling environment for development of the private sector
- ◆ expanded access and opportunity
  - ◆ simplify regulatory procedures and increase access to markets and technology
  - ◆ increase access to capital through cooperatives, village and neighborhood banks
  - ◆ develop banks and other self-sustaining financial institutions that service small savers and borrowers
  - ◆ expand and safeguard human and worker rights
- ◆ investments in people
  - ◆ education programs with emphasis on the quality and availability of primary education
  - ◆ targeted, market-oriented interventions aimed at technical and vocational training, the free flow of technology and technical information, and training in business skills
  - ◆ creation or improvement of systems providing health care
- ◆ nongovernmental organizations
- ◆ women's organizations

USAID Office of Women in Development  
The GENE 878 Project

Supplemental Flipchart # 1

## Environment

### USAID will support country strategies which include assessments and support of...

- ◆ improving agricultural, industrial, and natural resource management practices
  - ◇ soil and water conservation
  - ◇ reducing industrial- and energy-related environmental degradation
  - ◇ reducing rural and urban land-use problems
- ◆ strengthening public policies and institutions to protect the environment through
  - ◇ reform of national economic development strategies and policies
  - ◇ development of a comprehensive environmental policy framework
  - ◇ improved enforcement of environmental laws and regulations
  - ◇ creation or strengthening of competent environmental institutions
  - ◇ creation of environmental data bases and natural resource inventories
- ◆ bilateral and multilateral interventions
  - ◆ dialogue with governments on environmental regulations, natural resource use, energy pricing policies
  - ◆ dialogue with international agencies on environmental impact of lending practices, design and implementation of innovative mechanisms to support environmental work
    - ◇ e.g., trust funds, endowments
- ◆ research and education on
  - ◆ non-capital intensive elements of technology transfer
  - ◆ institutional cooperation, scientific exchanges, development of human resources, policy development
  - ◆ public education on issues affecting the environment

USAID Office of Women in Development  
The GENE 878 Project

Supplemental Flipchart # 2

## Population and Health



### USAID will support...

- ◆ voluntary family planning systems
- ◆ reproductive health care
- ◆ the particular needs of adolescents and young adults
- ◆ infant and child care
- ◆ education for girls and women

USAID Office of Women in Development  
The GEN EYES Project

Supplemental Flipchart # 3

## Contextual Levels Related to Issues of Gender, Age, Ethnicity or Race



### ◆ Cultural

- ❖ is dynamic
- ❖ changes slowly over time - usually not a direct point of intervention

### ◆ Political

- ❖ may have vested interest in the status quo
- ❖ does not represent all stakeholders

### ◆ Legal/Juridical

- ❖ is important in policy analysis
- ❖ can be targeted in policy dialogue
- ❖ may be a focus of legal system reform

USAID Office of Women in Development  
The GEN EYES Project

Supplemental Flipchart # 4

## Contextual Levels Related to Issues of Gender, Age, Ethnicity or Race (2)



### ◆ Institutional

- ❖ often controls access to resources
- ❖ usually policy is implemented at this level
- ❖ can be a direct intervention point

### ◆ Community

- ❖ is often the local "gatekeeper"
- ❖ influences cultural change
- ❖ an important point for information-gathering

### ◆ Small Group

- ❖ often an important entry point
- ❖ can identify and implement interventions
- ❖ is an important target for information

UNDP Office of Women in Development  
is a GENE 878 Project

Supplemental Flipchart # 5

## Contextual Levels Related to Issues of Gender, Age, Ethnicity or Race (3)



### ◆ Household and Family

- ❖ is critically important for gender role analysis
- ❖ is dynamic and multi-dimensional
- ❖ is an important target for information

**ALL**

components may act  
in the context  
of the other levels  
of the system

UNDP Office of Women in Development  
is a GENE 878 Project

Supplemental Flipchart # 6

## The USAID Path



⊖ USAID's fundamental goal is to help individuals in developing nations to improve the quality of their own lives and share equitably in the benefits of economic growth.

But, there are

*impediments*

to such development.

USAID Office of Women in Development  
The GENEPYB Project

Supplemental Overhead # 1

## The USAID Path



⊖ USAID will pursue two strategic goals:

① reducing long-term threats to the global environment, particularly loss of biodiversity and climate change; and,

② promoting sustainable economic growth locally, nationally, and regionally by addressing environmental, economic, and developmental practices that impede development and are unsustainable.

But, there are

*impediments*

to such development.

USAID Office of Women in Development  
The GENEPYB Project

Supplemental Overhead # 2

## The USAID Path



○ USAID's goal in this key area is to contribute to a cooperative global effort to stabilize world population growth and support women's reproductive rights...this effort should result in a total world population of between 8 billion and 9 billion by the year 2025, and less than 10 billion by the year 2050, with very low growth thereafter.

But, there are

*impediments*

to such development.

USAID Office of Women in Development  
The GEMETV8 Project

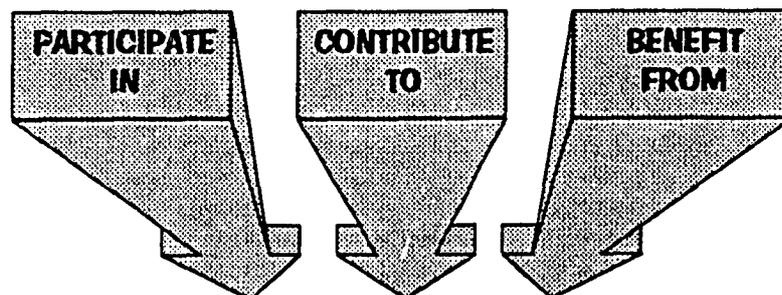
Supplemental Overhead # 3

## Gender and Development



*Goal*

To increase opportunities for women to...



the development of their societies and economies

USAID Office of Women in Development  
The GEMETV8 Project

Supplemental Overhead # 4

## Attributes of Experiential Learning



- ✓ significant learning is acquired through doing
- ✓ learning is facilitated by the learner's active participation in the learning process
- ✓ learning involving feelings as well as intellect is the most pervasive and lasting
- ✓ in learning, self-evaluation is primary and evaluation by others is of secondary importance

USAID Office of Women in Development  
The GEMSPV Project

Supplemental Overhead # 5

## "Successful" development is:

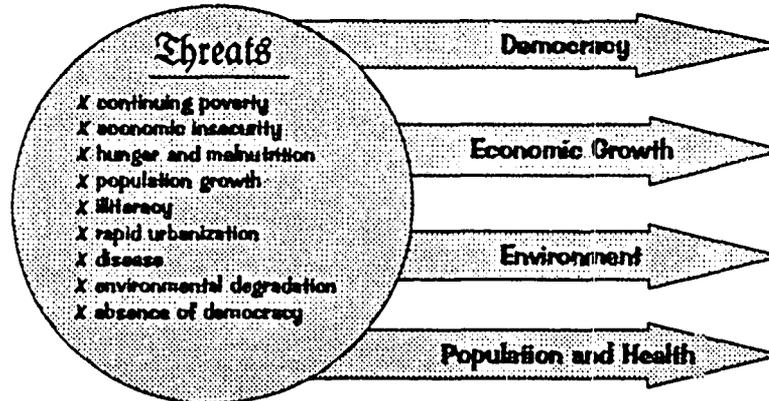


- ◆ **SUSTAINABLE.** It continues to benefit the local community, both women and men, after the development agency or project has completed its support and departed from the area. Understanding social dynamics of the community is key to planning for sustainability.
- ◆ **EQUITABLE.** It facilitates access to resources by all members of the local community because its the right thing to do.
- ◆ **EFFECTIVE.** It achieves development objectives by assuring that essential resources are put in the hands of those who do the work.

USAID Office of Women in Development  
The GEMSPV Project

Supplemental Overhead # 6

# Challenges & Responses



USAID Office of Women in Development  
The GENIEYS Project

Supplemental Overhead # 7

# Sustainable Development...



- ◆ permanently enhances the capacity of a society to improve the quality of life
- ◆ is characterized by economic and social growth that...
  - ◇ does not exhaust the the resources of a country
  - ◇ respects and safeguards the economic, cultural, and natural environment
  - ◇ creates many incomes and chains of enterprises
  - ◇ is nurtured by an enabling policy environment
  - ◇ builds indigenous institutions that involve and empower the citizenry

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The GENIEYS Project

Supplemental Overhead # 8

## **Sustainable Development...continued**



- ◆ **shifts USAID's focus from projects to the web of human relations changed by those projects**
- ◆ **requires investments in human capital -- in the education, health, food security, and well-being of the population**
- ◆ **challenges the status quo**
- ◆ **mandates participation**
  - ❖ **it must involve, respond to, and be accountable to the people who will live with the results of development efforts**
  - ❖ **it must help people build institutions of free discourse and inclusive decision-making**

USAID Office of Women in Development  
The GENIEVIB Project

**Supplemental Overhead # 9**

## **Partnerships...**



- ◆ **begin with collaboration between donors and the developing nations**
- ◆ **impose certain responsibilities on host governments**
  - ❖ **e.g., fostering local empowerment, particularly of women and members of minorities, as part of the development process**
- ◆ **are strengthened by donor coordination**
- ◆ **are reinforced by coordination with PVOs, NGOs, universities, professional and academic groups**
- ◆ **utilize the strengths of multilateral development banks and private enterprise**
- ◆ **require local participation, build local capacity and empower**

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The GENIEVIB Project

**Supplemental Overhead # 10**

## USAID's Approaches and Methods



### ◆ To address the development problems confronting peoples in countries where USAID works, it will...

- ❖ cooperate closely with host governments, local communities, and other donors
- ❖ consider how social, economic, political, and cultural factors affect development and develop strategies to address impediments
- ❖ minimize projects that operate without regard for other development programs or larger objectives
- ❖ integrate the needs and participation of women as well as men into development programs and into anticipated societal changes
- ❖ establish a paradigm of full participation, local involvement, and empowerment

USAID Office of Women in Development  
The GENIEYS Project

Supplemental Overhead # 11

## Participatory Development: Statement of Principles



### ◆ USAID seeks to support:

- broad access by people to their country's economy and participation in their society's decisionmaking processes
- broad participation by people in defining development priorities and approaches

◆ participation describes both the kinds of results desired, and the way that USAID must nurture those results

USAID Office of Women in Development  
The GENIEYS Project

Supplemental Overhead # 12

## Principles Six and Ten



- ◆ To overcome the tendency of projects to benefit only local elites, we will use gender analysis and techniques for data collection and consensus building such as participative rural appraisal
  
- ◆ We will take the measures necessary to equip ourselves to make good on these principles.... We will strengthen relevant skills and aptitudes in our staff and contractors -- stronger language and cultural skills, skills in discerning social processes, gender analysis and other techniques to enhance participation...

UNRWA Office of Women in Development  
The GENERTS Project

Supplemental Overhead # 13

**WID**  **GAD**



- ◆ **Women in Development**
  - ❖ highlighted the importance of women's contributions
  - ❖ focused only on women
  - ❖ tended toward women-only projects or components
- ◆ **Gender and Development**
  - ❖ evolved from WID to include both women and men
    - ❖ in reality, women and men together support families and, in the growing number of female-headed households, it is women who do so alone
  - ❖ focused on the needs of each member of the household
  - ❖ tends toward projects in which women and men both participate

UNRWA Office of Women in Development  
The GENERTS Project

Supplemental Overhead # 14

## Gender Analysis



**Gender analysis is not a specific technology.**

**Rather, it is a way of looking at the world, a lens that brings into focus the roles, resources and responsibilities of women and men within the system under analysis.**

- Aruna Rao

UNRSD Office of Women in Development  
The GENEWS Project

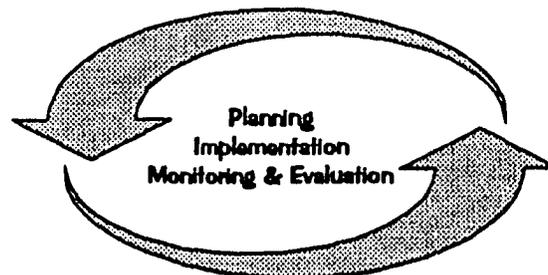
Supplemental Overhead # 15

## Gender and Project Analysis



◆ **WHEN to analyze gender differences in roles, constraints and opportunities?**

**In ALL phases of the project cycle:**



UNRSD Office of Women in Development  
The GENEWS Project

Supplemental Overhead # 16

## **Gender and Development Programming**



⇒ **WHEN to analyze gender differences  
in roles, constraints and  
opportunities?**

↗ **At ALL levels of programming:**

↘ **country**

↘ **sector**

↘ **program**

↘ **project**

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The GEMETYS Project

**Supplemental Overhead # 17**

## **We Need Data To...**



- ◆ **challenge assumptions**
- ◆ **describe the current situation**
- ◆ **plan accordingly**
- ◆ **monitor**
- ◆ **make adaptations**
- ◆ **evaluate**

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The GEMETYS Project

**Supplemental Overhead # 18**

## **Attributes of Good Objectives**

---



- ◆ in the project's manageable interest
- ◆ time-bound
- ◆ can be measured (with indicators)
- ◆ specific and observable

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**Supplemental Overhead # 19**

## **Manageable Interest**

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**Your project actions  
will clearly contribute  
to meeting the development  
objective(s).**

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**Supplemental Overhead # 20**

## Meaningful Objectives



- ◆ Objectives should be stated as completed actions
- ◆ Select strong action verbs

built    constructed    reduced from X to Y  
installed    increased from X to Y    conducted  
                  made    eradicated

**STRONG**

weak

coordinate    participate    organize  
contribute    enhance    support    advise  
collaborate    advocate    assist    improve    integrate

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Supplemental Overhead # 21

## Means of Verification, or...



- ◆ How do we get the evidence?
  - ◆ available from normal sources?
  - ◆ special data gathering required?
- ◆ Who will pay for it?
- ◆ Who will implement it?
- ◆ How much data gathering is worthwhile?
  - ◆ remembering Robert Chambers
    - ◆ optimal ignorance
    - ◆ proportionate accuracy

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Supplemental Overhead # 22

# Project Features

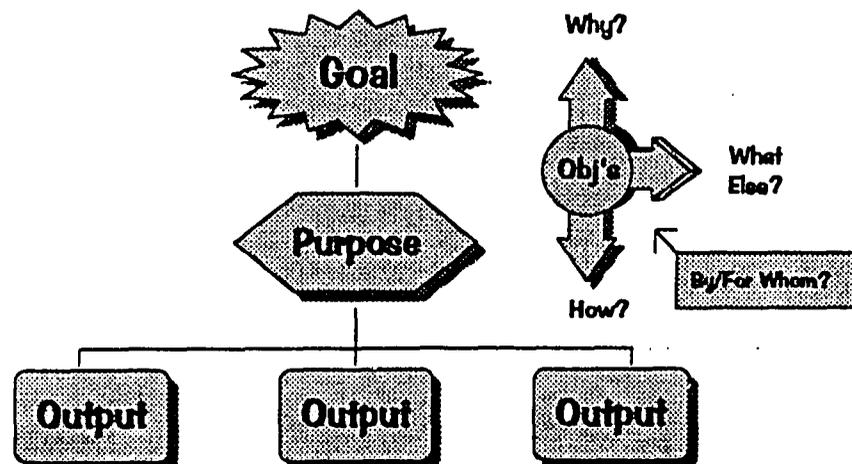


- ◆ Choice of promotion strategy
- ◆ Choice of technical package
- ◆ Timing and duration of activities
- ◆ Delivery systems
- ◆ Location of project activities or services
- ◆ Eligibility criteria
- ◆ Nature and distribution of benefits

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Supplemental Overhead # 23

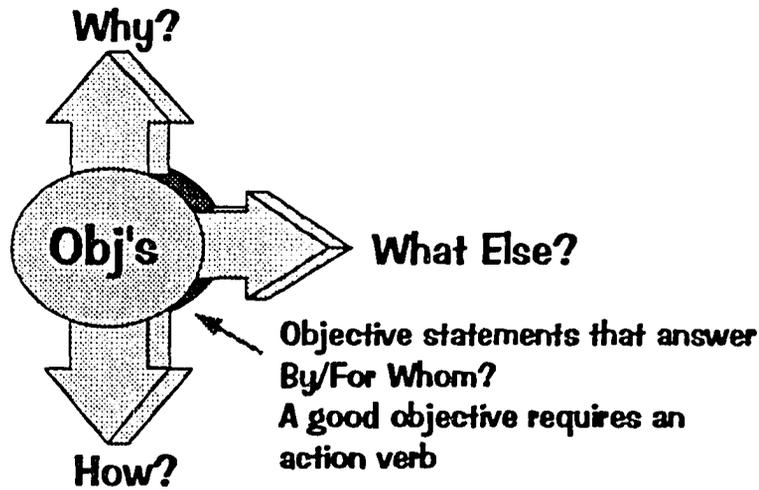
# Hierarchy of Objectives The Objective Tree



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Supplemental Overhead # 24

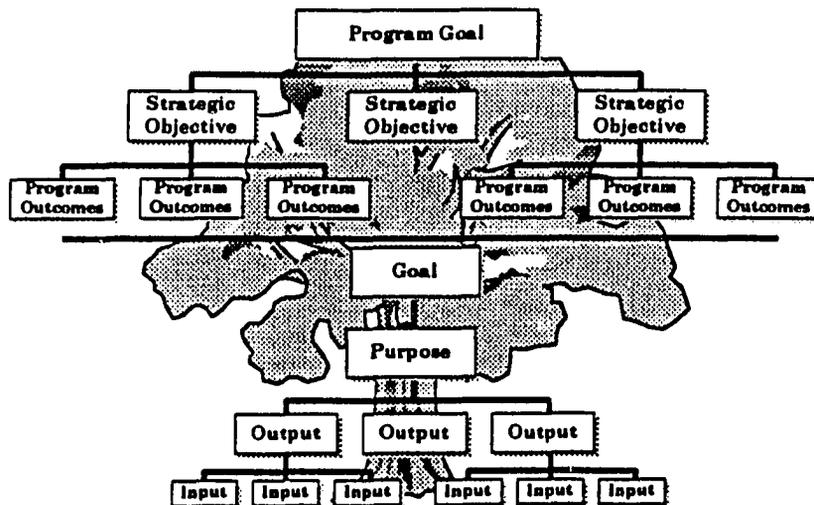
# The Essential Questions



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Supplemental Overhead # 25

# Objective Trees for Programs and Projects



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Supplemental Overhead # 26

## Forcefield Analysis

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- ◆ Effective performance
- ◆ Positive forces
- ◆ Negative forces
- ◆ Effective completion
- ◆ First steps