

# COMPASS GENDER TRAINING MANUAL

DOCUMENT 63 MAY 2003



Community
Partnerships for
Sustainable
Resource
Management in
Malawi

# **COMPASS Gender Training Manual**

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USAID Contract: 690-C-00-99-00116-00

Activity: 612-0248

## **ACKNOWLEDGEMENTS**

The development of this manual would not have been possible without the contribution of COMPASS, partner organizations and Government officials in the natural resource management sectors as well as CBNRM groups in the Districts.

Special thanks go to DAI/ COMPASS Chief of Party, Dr. Watson, and COMPASS staff members for their support, information and direction, the Ministry of Gender, Youth and Community Services for their guidance in the National Gender Policy on natural resources management, representatives of International Eye Foundation (IEF), National Initiative for Civic Education (NICE), RUFA, OXFAM, among others who attended the gender training workshop and contributed to the testing of this manual.

Special thanks also to USAID/DAI for funding the policy development exercise.

Thank you.

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#### **ACRONYMS**

AIDS Acquired Immuno-deficiency Syndrome

CBNRM Community-Based Natural Resource Management

COMPASS Community Partnerships for Sustainable Resource Management in

Malawi

GAD Gender and Development

GAM Gender Analysis Matrix

HIV/AIDS Human Immuno-deficiency Virus/Acquired Immuno-deficiency

Syndrome

IEF International Eye Foundation

NICE National Initiative for Civic Education

NGO Non-Governmental Organization

PRA Participatory Rural Appraisal

SWOT Strengths, Weaknesses, Opportunities and Threats

UN United Nations

USAID United States Agency for International Development

WID Women in Development

# **INTRODUCTION**

Gender has become an important aspect in programs particularly those funded by international funding agencies. The agencies are increasingly demanding to see in the proposals and in project implementation, how the programs address the gender issues. Organizations and Governments therefore want to integrate gender in the proposals and make an effort to implement the same in the programs.

While there is willingness to integrate gender, many organizations do not have personnel with relevant gender skills. In addition, gender has been misunderstood to mean 'women' programs and activities.

This manual provides development professionals, working as planners, organizers, educators, project managers, with the concepts on gender and gender analysis tools to facilitate local empowerment and capacity building and to make their work both more effective and more appropriate to the needs and interest of local people. It assists the development worker to visualize the interconnectedness processes of environmental, social and economic change, clarifying the relevance of social factors; e.g. class, gender, age, ethnicity and religion) in determining access and control over resources. Gender analysis tools enable the development worker to understand the gender relations, social structures and resource bases, in order to work with a community to change the conditions that hinder promotion of equity and social justice.

Underlying the approach of this manual is the basic premise that all social relations, and especially gender, are important variables in the development process. Recognizing the regional and cultural diversities in gender relations and how that determines the level and extent of participation of men and women in the development process is a crucial factor in planning to address the varying needs of men and women.

The manual provides a basic approach that facilitates community involvement in the conceptualization, planning, and implementation of projects, offering an on-going process of mobilization and organization that helps to reshape the community itself through use of gender analysis tools for community organizing, data gathering, consciousness raising, and project formulation. Participation of men and women is both a method and goal of this approach.

The approach in this manual is based on the following key assumptions:

- Social hierarchies exist in every society and often favor the few and disadvantage the majority
- These hierarchies are embedded in social institutions which are designed to perpetuate them through control over the environmental and socio- economic resources base
- Access to and control of the environmental and socio-economic resources are mediated through social institutional relations that are designed to perpetuate the hierarchy
- Social equity, including gender equity, can enhance livelihood security, productivity
  and sustainability because it involves all members of a community in building their
  capacities for their own development.

# Organization of the manual

Section 1 of the manual introduces the concept of gender and its relevance in development. The definition of gender is presented to assist participants appreciate that gender is not about women but about men's and women's roles and responsibilities in development. The evolution of gender as a development concept is also presented in this section

Section 2 provides tools useful for socio-economic and gender analysis. The tools offer a step-by step procedure for data collection and analysis. Procedure on how to interpret the information collected is also provided.

Section 3 of the manual provides a process for gender mainstreaming in institutional program policy development, program planning, monitoring and evaluation. A step-by-step process is also provided on how to identify institutional gender issues as well as analyzing institutional preparedness to mainstream gender and developing relevant actions in order to mainstream gender.

This training manual has been developed to assist institutions understand the rationale and the process in mainstreaming gender in the institutions and programs. It is recommended that the training be done for people from one institution at a time or if a number of institutions attend the training, they work in their institutional groups so that the training can draw on their experiences.

This manual should be regarded as a guideline and trainers are free to adapt in order to respond to the specific needs of the institutions they are dealing with.

#### **TIPS on Participatory Approaches for Facilitating Change**

It has been recognized that gender relationships due to culture determine to a great extent, the way men and women participate in any development process. In using this manual one needs to understand the participatory facilitation process that will make it easier for men and women to participate in the development process.

Enhancing the active participation of people in a group setting is an essential community development skill. How much participation takes place depends largely on the facilitator. To **facilitate** means to **make easier**. It is the task of the facilitator to make discussions easier, to make it flow, and to enable the participants to learn from each other. The facilitator helps the group arrive at decisions that will benefit them.

The role of the facilitator is one of assistance and guidance, not of control. Getting feedback is fundamental to everything the facilitator does. The direction and focus is always received from the group.

#### **Co-facilitation**

Experience in gender training shows that co-facilitation is key to improving the quality of the process. Whenever possible, it is recommended that to have male and female co-facilitators, men and women having the different perspectives and ease of working with various groups. When only women do the training, men view it as a women's event and the inclusion of men removes this feeling.

Managing meetings can be hard work, but the burden can be lightened when we share with a team member. A compatible team provides a balance and synergy that creates energy and stimulates enthusiasm in training.

How to stimulate participation

**Active listening**. Listening attentively and asking open questions encourages participants to expand on their theme. Active listening also involves watching the participants for non-verbal cues, such as facial expressions and posture.

Asking open questions: open questions invite reflection and encourage people to talk. Questions that ask: What do you think about..., Why ...., How...., What if... will elicit thoughtful answers.

**Note:** an open question may not work as a discussion starter with people who are not used to expressing their opinions freely in a group

Closed question call for a brief, exact reply. They limit the discussion by discouraging expression of attitudes related to the topic.

Note: Closed questions, however, can focus discussion on a specific point and can help the facilitator check whether or not the group understands the content and agrees with the content ideas.

A closed question: *Is this a helpful discussion?*An open question: *What do you see happening here?* 

**Rephrasing participants' comments:** Rewording the participants' comments allows the facilitator to clarify if she/he understands what someone is saying and reinforces the points that participants bring up.

Equalizing participation: Some group members may speak more or less than others based on their:

- Interest in the subject
- Knowledge on the issues
- Confidence in speaking in groups
- Self-esteem as affected by sex, age, class, gender, etc

The facilitator should be sensitive to these factors by including more silent group members and asking dominating participants to refrain from speaking at times. It is quite common that men may tend to speak more that women in a meeting.

**Redirecting discussion:** When a group leader is asked an open question it is sometimes a good idea to answer.

**Summarizing the discussion**. This consists of reviewing the main points, restating what decisions have been reached or which issues are still to be clarified.

**Assuming a friendly manner.** Reacting to what people say by nodding, maintaining eye contact or smiling shows that the facilitator is listening attentively.

**Managing conflict:** Disagreement is a natural part of the group process. If disagreements are focused on ideas and issues, they can become a part of the creative process of group interaction. If, however, criticisms are leveled at individuals personally, they can be destructive. The facilitator should interrupt the attack and help participants re-focus on the issues. The facilitator should even be more tactful when resolving conflicts or disagreements between men and women.

# A good Facilitator

- Keeps the group focused on task and process
- Listens more than talks
- Remains neutral
- Encourages everyone to participate
- Keeps the discussion going by asking questions or introducing new ideas
- Acknowledges differing viewpoints
- Speaks clearly
- Maintains eye contact
- Summarizes main points and decision made or issues resolved at close of session

# **MODULE 1: DEFINING GENDER**

# **Introduction:** Gender is a term that has been defined differently by different people.

In most cases gender has been understood to mean 'women' or women projects. This module assists participants to explore the term gender and its definition as used in the development context. The process assists participants to appreciate the fact that gender is about men and women and their roles in society and in development.

**Objectives**: Define the often-confusing term gender

Discuss the historical perspective of Gender from Women in

Development to Gender and Development

**Rationale:** Having a shared understanding of gender is critical for any

discussions on the topic. Gender is usually a sensitive subject and it has often been misunderstood and misused. Some regard gender as anything to do with women only. During this session, participants will develop a common understanding on what gender is all about and how important it is to mainstream gender at home, at the work

place, in school in the community.

**Link:** The session provides the foundation for discussing the value of

gender mainstreaming in institutional policy, programs, projects and

activities.

# **Preparation:** Prepare the following:

- □ Definition of gender written on a flip chart.
- □ Have key words used in gender on transparencies or PowerPoint for projection on the screen during the discussions

Materials: Flip chart paper and markers.

Index cards

#### **PROCESS**

# 1. Large Group

- ☐ Give each participant two index cards with different colors
- Ask them to write what they understand by the term gender and sex. Each person will write in one card what gender is and on the other card what sex is
- Have participants present what they have written on the index cards and then post them on the flip board or the wall using the following format.

What gender is	What sex is
<ul> <li>Societal roles of each sex</li> </ul>	<ul><li>Biological</li></ul>
<ul><li>Culturally determined</li></ul>	<ul><li>Unchangeable</li></ul>
<ul> <li>Varies from society to society,</li> </ul>	<ul><li>Universal</li></ul>
generations to generations	
□ Changeable	

□ Summarize the discussion on gender and sex by using overhead transparencies or flipchart

#### Sex

Sex is the biological difference between men and women. Sex differences are concerned with men and women's bodies. Sexual differences are the same throughout the human race.

#### Gender

While sex is a fact of human biology, gender is not. The experience of being male and female differs dramatically from culture to culture. The concept of gender is used to describe all the socially given attributes, roles, activities and responsibilities connected to being a male or a female in a given society. Our gender identity determines how we are perceived, and how we are expected to think and act as women and men, because of the way society is organized.

☐ Emphasize the following points as addition to what has been discussed above

Sex is a law of nature –from birth, universal and, unchangeable. However, societies can and do construct different gender roles and expect certain different behaviors from men and women. Such expectations can change depending upon the society, the economic climate, or crises such as war or famine.

Gender roles change over time.

# 7. Large Group

 Discuss in plenary why gender roles change. Write the reasons on the flip chart and discuss the implications on the current projects participants are involved in

#### Why gender roles change

Some of the reasons why gender roles change may include:

- War where men are killed and women become the heads of household
- Fragmentation of families because of migration for wage employment
- Technological changes- or labor reducing technologies e.g. the introduction of the microwave makes it easier for men to cook, ox-carts and bicycles make it easier for men draw water etc
- Exposure to other cultures including education
- Globalization
- HIV/AIDS pandemic has created child headed households
- Economic hardships e.g. retrenchments have led to women being the bread winners a role supposedly to be a man's role
- New norms and expectations as families become more fragmented or the social support system fragments
- Empowerment of one gender group which tend to change the roles
- Shifts from exchange work groups to wage labor
- In the large group give participants the following quiz to assist them reflect on the definition of gender and sex. For each statement, mark sex or gender
- Let each person work alone before they start sharing in the big group

#### **Note to the Trainer**

(This quiz is just an example. The trainer can also come up with a gender quiz relevant to the roles and responsibilities of men and women).

#### Statements about men and women

- 1. Males cannot give birth to babies, females can.
- 2. Women can breast-feed babies, men can bottle feed.
- 3. Most construction workers in our country are men. Men's voices break at puberty, women's do not.
- 4. Little boys are tough; little girls are gentle.
- 5. In many countries, women agricultural workers are paid less than men are.
- 6. In most cultures, women cook but men are known restaurant chefs. According to UN statistics, women do 67% of the world's work, but earn only 10% of the world's income.

(Adapted from the Oxfam Gender Training Manual, by Suzanne Williams with Janet Seed and Adelina Mwau, 1994)

□ Review the common terms commonly used in gender and related to gender. They can be projected on an overhead projector. It is important for the trainer to allow participants discuss the terms before providing the definitions.

**Gender Equity:** Equity is a term borrowed from economics which means that a given person or group benefits from an activity to the extent that they invest resources.

**Gender Equality:** Women and men have equal opportunity to participate in and benefit from a given situation.

**Gender analysis:** conducting an analysis of the actual activities, behaviors, resources, roles according to the gender groups in the community.

**Gender Stereotypes:** Fixed societal views of how men and women should behave and what kinds of tasks they should take on in society, such as only women being the caretakers of children or only men responsible for cash crops

**Gender Sensitivity:** Developing and demonstrating awareness of the stereotypes and language that constrain women and men from reaching each individual's potential outside of society's "assigned" roles.

#### GENDER MAINSTREAMING

Mainstreaming gender means that the legitimacy of gender equality as a fundamental value is reflected in development choices and practices;

• Gender issues are reflected not just as women's issues but societal.

- ☐ Gender equality goals influence mainstream economic and social policies that deliver major resources.
- Gender equality is pursued from the center rather than from the margins.

Mainstreaming gender means that women and men equally participate as decision-makers about social values and development directions

- □ Women as well as men are in a position to influence the entire agenda and basic priorities
- □ There are collective efforts by women and men to redefine the development agenda

**Stakeholders:** All those (individuals and / or groups) who stand to gain or lose given a particular development activity, program or policy. They can be women, men, communities, social groups, or institutions from any level of system.

**Gender Gap:** The difference and possible inequities between men and women and men's gender roles that are illustrated as a result of using analysis tools.

□ Talk about three different types of gender training and how each addresses issues around gender.

**Gender awareness:** This is when men and women become aware of the term and its implications in their roles and behaviors. This is often called gender "sensitivity", but the term is not used here because it implies that someone is insensitive when they may just be unaware. Also, we cannot assume that most of the women are aware of the gender implications for men since the focus of the gender work has been almost exclusively for women.

Gender analysis applied to programs and organizations, using checklists and gender analysis tools. Gender analysis tools applied to communities, especially rural areas, is one of the most common type of gender training which uses tools like Participatory Rural Appraisal (PRA), Context Analysis, Activity and Resource Profiles using the Harvard Gender Analysis Framework, and Gender Analysis Matrix (GAM) etc.

#### □ Summary

- 1. It is important that at this stage for the trainer to find out whether participants have grasped what gender is and what it is not e.g.
  - □ What have you learnt about gender that you did not know before?
  - □ What will what you have learnt today assist you to do?

#### **MODULE 2: GENDER SOCIALIZATION**

**Introduction:** Roles and responsibilities of men and women are different in

different cultures. These roles and responsibilities are a result of how people are socialized in each culture. There are some roles in certain communities that are men's roles when in another culture women perform the same roles. This module assists participants to understand the process of socialization and how that influences our

behavior in the family, community, in school and in the institution.

**Objective**: Identify the childhood messages about gender that have shaped their

lives.

Describe how childhood socialization influences gender relations and

behavior in an institution.

**Rationale:** This exercise sets the scene for a discussion on gender and how

gender messages that children receive can affect them in their lives;

at home, school and the workplace.

Children are made conscious of the fact that they are boys or girls from childhood. This is done by the messages given by parents, or family by allocating certain roles. These roles make a child know that because of his/her sex he/she is expected to perform certain roles, or

behave in a particular manner.

**Link:** Childhood messages and the way men and women are socialized

greatly influences gender relations in relation to power and decision making, access to and control over resources, institutional behavior

and institutional policies.

**Preparation:** Prepare a flipchart model with four sections for male and female

participants to fill in.

Boys Do	Girls Do
Boys Don't	Girls Don't

**Materials:** Flip chart paper and markers.

Index cards

#### **PROCESS**

#### 1. Small Groups

□ Divide the participants into small groups (maximum of 6). Give each group paper and markers.

□ Show them the flipchart model "Boys Do, Girls Do" and ask them to come up with as many messages as they can remember based on the following question:

When you were a child, what messages were you given about what boys and girls should or could not do or be? Should or could not be?

- □ While in the small groups, ask participants to discuss the following questions:
  - 1. How would you characterize the messages for girls?
  - 2. How would you characterize the messages for boys?

# □ Large Group

This is an important session because it forms the foundation of the discussions of the other sessions in this training; gender roles and gender in the institution. In the plenary, each group will present their discussion. The facilitator will summarize the main points on one flip chart. The facilitator will have to probe for discussions on the points being raised because this session forms the foundation of discussing gender. Below is an example of what could come up from group discussions.

#### **Typical Responses from Groups**

Boys are bigger
Boys keep the family name
Girls are not allowed to play with cars
Boys are not allowed to play with dolls
Girls should look pretty
Boys can't cry
Girls have to cook food for men

Boys will have to work when they grow up, women don't have to Girls have to sit in a particular way

Girls have to stay at home and help their mothers with particular chores while boys can go and play after school

Boys are the providers Boys handle tough jobs but girls handle easier ones

- □ While in the large group, ask participants:
- 1. Are there any commonalties among the group responses on the roles of boys and girls?
- 2. Did anything surprise you?

# A Gender Stereotype

For a man, the sky is the limit. For a woman, it is the roof of the house -anonymous

#### Trainer's note:

Most boys' messages refer to being in charge, being a leader, being 'out there' in the world, taking care of or protection of females, 'being your own man,' taking initiative, being their provider, being smarter, not crying, etc.

Girls' messages usually illustrate restrictions, being in the background, or fulfilling other people's expectations: keep clean, don't fight, be gentle, be ladylike, look pretty, be nice, and be subservient. Point out that while girls' messages restrict them from fulfilling their abilities or wants, boys' messages place equal pressure on them to fulfil their roles. Mention that in many countries men have more heart attacks from stress and have much higher suicide rates.

# 3. Small Groups

- □ Point out that gender messages touch and influence our very identity and our gender relations.
- ☐ Ask participants to link these childhood messages to our behavior and attitudes today in the family and workplace or institutions. Circulate to the small groups to ensure that they understand the instructions and that their discussions are focused.
- ☐ In the small groups they will discuss the following questions:
- 1. How do these messages shape our behavior in the family?
- 2. How do these messages translate in the workplace?
- 3. How do the messages influence behavior in the workplace between men and women?
- 4. How do these messages influence the way we conceive and design programs and projects? Give some examples from your institutions.

#### 5. Large Group

□ Have each group present their discussions. Emphasize the importance of being open about the gender stereotypes in the work place because of the way people are socialized during childhood. Also emphasize that when there is this awareness about the gender stereotypes arising from the way we were socialized, it is easier to introduce change.

#### How gender socialization influences design of programs and projects

- Labor intensive activities are for men e.g. watchmen, construction work etc
- Projects are sometimes designed to reinforce the stereotype roles of men and women;
   e.g. increasing woodlot for firewood for women, increase income to enhance household level activities etc.
- Decision making positions are filled by men and decisions made reflected the thinking and aspirations of men.

# How gender socialization influences career choice

- Girls tend to choose caring type of careers like being a secretary, nurse, housekeeper etc because they were told that science subjects are for boys.
- Boys are in what is considered tough or labour intensive jobs like engineering.
- Even when boys or girls wanted to do subjects or take careers that they really wanted, society or the school system discouraged them because of the gender stereotype thinking.

Note to the trainer: It is important to emphasize that this is changing and girls are increasingly taking subjects and careers they want due to social changes and attitude change

# Large Group: Quiz Handout

## Quiz on roles and responsibilities for men and women

This is not a test on gender awareness. It is just a way of looking at our first thoughts about peoples' roles and activities. Look at group rather than individual answers. Tick whether you think each role or activity is done mostly by men or women. Do not ponder your answer for a long time- your first thoughts are what matters. If you do not know or cannot decide, leave that one and go on to the next one, in order to finish. Share individual work in plenary after everyone has finished ticking.

Roles Man Woman

- 1. Chef
- 2. Housewife
- 3. Nurse
- 4. Nurse
- 5. Tailor
- 6. Community Leader
- 7. Accountant
- 8. Mother
- 9. Union Organizer
- 10. Refugee
- 11. Politician
- 12. Head of the Family
- 13. Breadwinner

Activities Man Woman

- 1. Sewing
- 2. Carrying heavy things
- 3. Operating machinery
- 4. Cooking
- 5. Selling
- 6. Basket weaving
- 7. Talking
- 8. Planting vegetables

# Adapted from "Oxfam Gender Training Manual" Oxfam UK&I 1994 page 173

Note to the trainer

Discuss with participants the changing trends and the way roles and responsibilities are changing presently. This will reinforce the facts that gender roles change over time. For example, cooking is culturally a man's role but men are chefs and actually best cooks. Women are also community leaders and politicians and even Presidents and Prime Ministers in some countries.

# **MODULE 3: HISTORY AND PERSPECTIVES OF GENDER**

**Introduction:** Gender as a concept in development has evolved over time. It started

with the women's movement on women's rights and the campaign to

address the oppression and marginalization of women in

development. This led to a push for advocacy on discrimination of women. Gender and development is a product of all these movements and this module assists participants to understand how gender

evolved and how it has become an important development issue

**Objective:** Place gender in the historical context of the women's movement and

development

Discuss the difference between 'Women in Development' (WID) and

'Gender and Development' (GAD) approaches.

Describe the difference between practical needs approach and

strategic needs approaches in development planning

Rationale: This session helps participants to understand the evolution of gender

in development and also appreciate the broader context of gender in

development

This session prepares men and women to work together by assisting them to understand that gender is a concern for men and women.

Link: This session justifies why men and women's issues and concerns

should be mainstreamed in policy and programs.

**Preparation:** Prepare flipchart describing the difference between WID and GAD.

This can also be given out as a handout

Prepare some printed information available for distribution to

participants

**Materials:** Flipchart paper, marker pens.

#### **PROCESS**

#### Step 1. Large Group

- □ Ask participants what they know about the women's movement and the focus on women in development in the '70s and late '80s to the present
- □ Ask participants to give some examples of women's projects they know about that were funded through the programs?
- Discuss the responses from the groups
- Discuss the historical evolution of the women's movement and make the following points:

#### **Historical perspectives**

**1970s:** Equity was becoming a development issue particularly during the international decade of women. There was emphasis on integrating women in development. Separate programs for women were developed and funded by development agencies. This approach was called 'Women in Development '(WID)

**1980s:** WID was marginalized. The beginning of the use of the term 'gender' to include both women's and men's concerns in programs and activities.

**1990s:** Gender program were established but the term 'gender' was often synonymous with women because of the previous WID approach where emphasis was on women's activities

**2000s:** emphasis is on men and women, development of gender policies to assist in tackling the causes of gender imbalances in development and promote equity and institutionalizing gender.

#### **Step 2: Small Groups**

- □ Remind participants that in the 70s, there was an emphasis of establishing activities in an effort to integrate women in development and to improve their development status. Have participants discuss in small or buzz groups what they know about the women's projects or activities that were established which they know about? Ask this question:
  - 1. What were the characteristics of women's projects and activities established in the seventies particularly during with the emergency of the United Nations' 'International Decade of Women'?
  - 2. Ask them to think of any projects they have worked with or any that they know about. They should discuss what they think are the strengths or limitations of the women's projects or activities.
  - 3. What were the strengths of these programs and activities?

#### **Step 2: Large Group:**

- ☐ Have participants report what they have discussed in the small groups
- □ Summarize the main points from the discussion. Point out the fact that women's projects

# Characteristics of WID projects and activities

- Targeted women and excluded men to a large extent
- Problem based-activities focused on tackling the practical problems or needs of women
- Did not look at the strategic needs; tackling the root causes of why women were marginalized so that policy could be developed to address those issues
- Focused on economic empowerment of women to fulfil their gender roles at the household
- Introduced labour reducing technologies for women

#### Limitations

- Literacy levels of women were low
- Management skills for initiatives like income generating activities developed were low
- Men were left out of the process leading to social conflict, men sabotaging women's activities
- Management and technology maintenance roles still men's
- Process did not recognize the cultural factor related to gender roles, division of labour and power relations
- Activities determined by donors or sponsors

# **Strengths**

- □ Women were recognized or given centre stage of attention in development
- ☐ Effort was made to develop the capacity of the women to manage their projects and activities although
- □ Women were empowered economically
- ☐ The projects developed into a mass movement of women
- □ Non- Governmental Organizations and Community Based Organizations were developed to facilitate initiation and management of women's projects
- ☐ As a result of the awareness of the role and contribution of women, Governments started to create ministries and departments to facilitate gender related polices and activities
- ☐ There was emergency of the affirmative action to mainstream women in development and management, educational opportunities

# **Step 3: Large Group**

#### 1. From Women in Development (WID) to Gender and Development (GAD)

Discuss in plenary how the evaluation in 1995 by the United Nations revealed that women had not benefited from these small and parallel programs because practical problems did not address causes of disparities. In the late 80's and in the 90's and after, the emphasis has changed to gender and development. The following table shows the difference between WID and GAD both in philosophy and approach

Elements	Women in Development	Gender and Development
The Approach	This approach sought to integrate women into development	An approach which seeks to empower women and transform unequal relations
The focus	Women	Relation between men and women
The problems	<ul> <li>The exclusion of women from the development process</li> <li>The approach was focused on the practical problems of women but did not question the policy and the system which hindered women's participation</li> </ul>	There is effort to address unequal relations of power roles and responsibilities between men and women that prevent equitable development and full participation of men and women
The Goal	More efficient, equitable	Equitable, sustainable

	development	<ul><li>development</li><li>Women and men sharing decision making and power</li></ul>
The strategies	<ul> <li>Women's projects</li> <li>Integrated projects</li> <li>Increase women's productivity and income</li> <li>Increase women's ability to manage their households</li> </ul>	<ul> <li>Identify and address short term needs determined by women and men to improve their condition</li> <li>At the same time, address women's and men's long term interests</li> </ul>

#### 2. The Difference between Practical Needs and Strategic Interests

Discuss with participants what they understand as the difference between practical needs and strategic needs or interests

Trainer can use the following table and afterwards give the hand out below to participants

Practical Needs	Strategic Needs	
<ul> <li>Tend to be short term</li> <li>Unique to particular groups</li> <li>Related to daily or immediate needs</li> <li>Easily identifiable</li> <li>Can be addressed by specific inputs; food, hand pumps, water provision, sanitation</li> </ul>	<ul> <li>Tend to be long-term</li> <li>Common to all groups; men and women</li> <li>Related to disadvantaged groups</li> <li>Basis of disadvantage and hope for change not always easily identifiable</li> <li>Can be addressed by long-term solutions like education, political mobilization, enhancing organizations</li> <li>Need policy to address the issues identified</li> </ul>	
<b>Examples:</b> Food, fuel, housing, health, water, and sanitation	<b>Examples:</b> educational opportunities, freedom from violence/abuse, access and control over resources, equity in wages, self esteem of low status groups, participation in local and national processes	

Discuss with participants the following questions regarding their program approach in relation to WID and GAD;

- 1. Do the trends in your projects, development planning and implementation reflect any changes from WID to GAD?
- 2. What can indicate that there has been that shift of emphasis in your projects?

Summarize the discussions by emphasizing the importance of looking at the historical perspectives of approaches to gender and development.

#### Handout

#### Difference between Practical Needs and Strategic Interests

The Women in Development approach sought to address practical needs of women. Different roles generate both practical needs and strategic interests. Practical needs are immediate and arise from current conditions. Women's practical needs tend to focus on the domestic arena, income-earning activities, housing and basic services, all identified as women's responsibilities. Childcare services, maternal care services, maternal and childcare services, subsistence crops marketing, and traditional employment opportunities are means to address these needs. While practical interventions can increase women's participation in the development, they are unlikely to change gender relations and, in fact, may preserve and reinforce inequitable divisions of labor.

Strategic interests are long-term, related to equalizing gender-based disparities in wages, education, employment, and participation in decision making bodies. Addressing strategic interests may challenge the prevailing policies in relation to balance of power between men and women for example institutionalized forms of discrimination (e.g., the right to own property and access to credit) promotion of political equality, etc.

Practical needs and strategic interests are linked. Responding to practical needs identified by women at the community level can provide an entry point to identifying and addressing their long-term strategic interests. For example, a scholarship fund may enable poor girls to attend school, filling a practical need; while adopting and enforcing laws and policies for equal education addresses a strategic interest.

Projects will benefit measurably when gender concepts are actively incorporated into the development process. Development goals will be met more efficiently if the long-term interests of gender equity are advanced.

# MODULE 4: GENDER ANALYSIS AND GENDER ANALYSIS TOOLS

#### **Introduction:**

In developing countries, women are the primary managers and users of natural resources. Yet gender is an often-overlooked element in agriculture, water, forestry and other natural resources programs and projects. Gender analysis is one important process of increasing our understanding of gender- based division of labor, indigenous knowledge, access and control of resources, and participation in community institutions with respect to natural resource management.

Gender analysis provides a step-by-step process of collecting and analyzing information for planning of projects aimed at ensuring gender equity. Effective program and project planning is therefore based on adequate information and sound gender analysis.

**Objectives:** 

Introduce the purpose of Gender Analysis Clarify gender analysis terminology and concepts Present an overview of the gender analysis framework

Rationale:

Gender analysis is crucial in understanding the context within which gender issues and concerns are integrated in planning and management of natural resource programs. Information from gender analysis is useful in ensuring that development objectives address the needs and priorities of both men and women as well promoting levels of participation in projects.

Link:

Gender analysis provides the foundation for justifying integration of gender disaggregated data in planning, implementation, monitoring and evaluation of natural resource management projects.

**Preparation:** 

Have the following for this session:

- Case studies for group work
- Community with a natural resource management project

Materials

Flip chart stand Flip charts Marker pens

Written up cases studies

#### **PROCESS**

#### Step 1: Large Group

 Ask participants to write on index cards what they understand by gender analysis

Gender analysis is a planning tool. It provides a step-by-step method for incorporating gender issues appropriately into natural resource management projects.

 Share in plenary what they have written on the cards and summarize what gender analysis means

#### **Step 2: Small Groups/Buzz Groups**

- Based on the definition of gender analysis, ask participants in plenary or in buzz groups (a pair or groups of three) to discuss the purpose of gender analysis in natural resource projects
- Summarize the discussions in plenary and summarize as follows:

# Purpose of Gender Analysis in Natural Resource Management Projects

- Enhances development of natural resource projects ensures that development objectives address the needs of both men and women
- Generates gender disaggregated information for (people-centered, men and women) development planning, implementation, monitoring and evaluation
- Contributes to positive social impacts of natural resource management projects. Projects consider both environmental and social needs for better impact; who is most affected, therefore the need for gender disaggregated data.
- Contributes to program success because men and women's needs are taken into consideration and their participation is enhanced.
- Helps make efficient use of natural resources because both men and women are involved in decision making

#### **Step 3: Large Group**

#### **Gender Analysis Frameworks**

In the large group, introduce to participants what gender analysis frameworks are as follows:

Gender analysis is done using certain frameworks that have been tested and found to be useful in generating disaggregated information required. The frameworks can be used by planners, policy makers; program or project managers in their work not only in natural resource management sector but the methodology provided can be applied to any sector.

# What is a Framework?

A framework is a standard format into which specific information is fitted to arrive at an analysis of a development situation. Using a framework provides a step-by-step method to guide the application of gender analysis to development policies, plans, programs, projects or activities.

The framework serves a sort of compass; it is a tool to help find the way to more successful natural resource management development.

The gender analysis profile has four tools or frameworks, each of which is used to organize and analyze information in order to determine whether or not initiatives meet the needs of both men and women. In using the frameworks one discovers the linkage between gender issues and natural resources use and management. These are:

- Context Analysis
- Activity Profile
- Resource Profile

Gender Analysis Framework

# **MODULE 4A: CONTEXT ANALYSIS**

**Introduction** In gender analysis, there are three levels of social interaction;

households, social institutions, and natural and socio-economic resources. Constraints to and opportunities for social equity are embedded in the interlinking systems. A development program that seeks to improve the situation of disadvantaged groups must analyze how systems at all levels interact to affect a marginalized group.

**Objective:** Describe the use of the context analysis

Describe levels of context analysis

Discuss the framework used for context analysis

**Link:** Context analysis is a tool for examining the various systems

interacting to influence a priority group's circumstances. Use of the

tool allows a systematic analysis of factors contributing to marginalization as well as a means to strategize for change.

**Prepare** an outline of the contextual analysis framework that can be

filled in during the session

**Materials:** Newsprint, paper and markers

#### **PROCESS**

#### **Step 1: Large Group**

- Ask participants to discuss the following questions
- 1. What do you understand by the term 'context analysis?
- 2. Why is context analysis necessary?
- Write answers on the newsprint and discuss each of them as they are presented for purposes of clarity
- Summarize the discussions by using the following

#### **Context Analysis**

A context analysis/profile examines the environmental, social, economic, and institutional factors that make up the development the 'constraints' or 'supports' related to gender that might determine the failure or success of a project.

In a context analysis, one is able to identify norms, trends and changes that present constraints or support for development in a particular area. This analysis is called a 'development context' analysis that is done at three levels:

- Household level e.g. gender division of labor
- Institutional level e.g. institutional policy and gender arrangements in relation to natural resource management
- National (macro level) policy issues that affect management of natural resources; do they articulate gender issues.

# Context profile is used to:

- Highlight natural resource issues and as they affect men and women
- Broadens the context for natural resource development t to include economic, institutional, demographic, social and political cultural norms, trends and changes
- Identify constraints and supports to development in natural resource management

# **Step 3: Small groups**

- Select one, two or three group with an ongoing project in natural resource management that participants are aware of (e.g. fishpond, afforestation). Divide participants into groups so that each group select one project. Let each group do a context analysis by answering the following questions.
  - 1. What are the contextual issues that will support or hinder the achievement of the project selected
  - 2. What actions or interventions can improve the situation?

# Use the following context analysis framework to complete the exercise

Context	Condition	Support factors	Constraints	Action/intervention
Household				
<b>Socio-Institutions</b>				
Political				
Legal Issues				
Cultural				
Socio-economic				
Capital/Income				
Knowledge and Information				
Literacy				
Natural Resource Base				
Land				

#### Step 4: Process for conducting a context analysis

- 1. The context profile is best done in a participatory process; with the community; men and women.
- 2. The facilitator should first of all develop the context framework with categories of context issues to be discussed
- 3. Develop a checklist of questions to guide the discussion. The questions should be openended to allow community a chance to discuss freely.
- 4. The context framework is filled as the discussions go on.
- 5. At the end of the discussion, the facilitator should tell the group what is emerging; the support issues and the hindering issues
- 6. Discuss with the men and women the appropriate actions to be taken to make sure that the planned activities are achieved without any problem

#### Notes to the Facilitator

In the context profile, the dynamic relationship between different categories of constraints and supports also can be considered, say, between the social and economic. For example, in every culture there are norms of gender roles. However, nearly everywhere, these norms are undergoing change due primarily to economic crisis. As real incomes erode, men migrate to find wage labour, increasing the work of women who remain on the farm.

# Example of how a summary of the supports and constraints cab done:

Constraints	Supports		
Environmental	Environmental		
<ul> <li>Frequent forest fires</li> <li>Increasing rates of soil erosion</li> <li>Rapid deforestation</li> </ul>	■ 6-months rainy season		
Institutional	Institutional		
<ul> <li>Women lack legal rights to own land</li> <li>Few extensionists trained in participatory approaches to natural resource management wok</li> </ul>	<ul> <li>New Forestry policy emphasizes agro- forestry and woodlot activities in addition to forest protection</li> </ul>		
Demographic			
<ul> <li>High fertility rate</li> <li>Increasing male out migration to cities</li> <li>25% farms are female headed</li> </ul>			

# **MODULE 4B: ACTIVITY PROFILE**

**Introduction:** Men and women may have very different types and levels of

involvement at the community level. New projects can affect the distribution of responsibilities, either positively or negatively. The Gender Analysis Activity profile offers a means to discuss community activities, the reasons they are undertaken, and the division of responsibility for them. Discussions take place with men

and women, preferably in small groups.

**Objectives:** Define what gender activity profile is.

Describe the importance of a gender activity profile. Demonstrate the gender activity profile frameworks.

**Rationale:** The activity profile clarifies factors that determine the gender-based

division of labor and gender related control over resources of the community. Discussing these issues in a public forum raises awareness of gender-based inequities in resource access and control,

as well as in labor demands. It can also lead to community action to

address these inequities.

**Link:** The activity profile; gender roles and responsibilities are related to

the context profile and the access and control over resources. These roles determine the power relations in the community and the

household.

**Preparation:** Prepare some formats for activity in advance for analysis like the

Harvard Framework of Analysis.

Materials: Newsprint or other larger paper

Markers

#### **PROCESS**;

#### **Step 1: Large Group**

Ask the group to discuss in plenary the following questions:

- 1. What is gender activity analysis/analysis?
- 2. Why is it necessary to do activity analysis/profile?

# Why gender activity analysis is important

The activity profile is used to analyze gender-based divisions of labor. It identifies the activities of both men and women. The profile is used to

- Discover productive and reproductive activities of both men and women.
- Understand dependency on natural resources by gender.
- Identify labor bottlenecks by producing a complete picture of women's and men's workloads to discover where introducing improved methods or appropriate technologies would be most beneficial.

- Identify locations where activities take place- this has implications for program delivery, particularly if women's mobility is restricted.
- Identify clearly who does what, in which activities do women or men predominate? Which activities are carried out by both men and women?

Women's and men's roles differ between and within cultures; women and men are responsible for different though complimentary productive activities. Their overall labor roles may reflect:

- Type of activity e.g. natural resource, crop, livestock.
- Stage of production such as nursery management, planting, weeding, pruning, harvesting, and marketing/selling. Sometimes the activities overlap and sometimes they can be distinctly separate.
- Women and men are not only farmers, but also wives/husbands and mothers/fathers within responsibilities for reproductive activities. These roles must be taken into consideration in planning. Tasks like water and fuel collection and processing of food and no-wood fuel products, can be particularly time consuming because they are often carried out with traditional tools and processes.

# Step 2:

Ask the participants to choose a community and choose some common community activities. The list might include items such as:

- Tree planting
- School maintenance
- Fundraising for a church
- Organizing a health clinic
- Organizing community celebrations
- A political activity
- Work on an NGO funded project

#### Step 3:

When the list is complete, ask the group to identify whom i.e. responsible for each of the activities, including

- Male/female children
- Male/female teenagers
- Male/female adults
- Male/female elders

#### **Gender Analysis Activity Profile**

Activity	Who does it?	Why?
Tree planting		
School maintenance		
Fundraising for a church		
Organizing a clinic		
Organizing community		
celebrations		
A political activity		
Work on an NGO funded project		

# Step 4

The trainer should then lead a discussion focusing on why one group rather than another undertakes a particular activity. A set of subsidiary questions, such as the following, will clarify the issue.

- 1. Why do men (rather than women) do a particular activity?
- 2. What are the implications of men doing this activity and not another?
- 3. How do the people who do the work benefit? Is it paid work?
- 4. *In what ways are roles changing?*
- 5. Given the patterns of division of labour noted in the analysis, what type of projects are most valuable to men, to women, in the community, who has time to be involved in the projects and why?

#### **Note to the Trainer**

It may also be appropriate to raise questions concerning community activities vis-à-vis specific ethnic groups, castes, or social classes, not simply gender. The activity can be organized around the most suitable social variables.

# Step 5

Show participants that Gender Activity profile can be done using the following format or framework.

# **Activity profile**

Location	Activities	Gender	Time /Season
State forest	Fuel collection	F/M	
	Fodder collection	F/M	
	Timber collection	M	
Lowland field	Rice production		
	. land preparation	F	
	. transplanting		
		F	
	. weeding		
	. harvesting	F/M M/F	
Lakes and rivers	Fishing	M	
	transport	M	
Homestead	Furniture making	M	
	Post harvest processing	F	
	cooking	F	

#### Step 6. Using the Harvard Analytical Framework

Introduce participants to the Harvard Analytical Framework since it one of the ones most often used.

The Harvard Framework consists of the following four major components: the activity or division of labour profile, access and control over resources and benefits.

# 1. Activity Profile/Division of Labour

This one generally answers the question 'Who does what? The activity profile provides a contextual database or a picture of the community in question with a detailed analysis of relevant productive and reproductive roles. Reproductive roles are more than those that are associated not just with procreation but include household activities related to family sustenance. In this analysis, one can go further to include when, how, how often etc and by as many specific roles as necessary.

The activity profile measures the following areas at the household level. One can use the following scoring: 0-not involved, 1- sometimes involved, 2- fully involved

	Women	Men	Girls	Boys
Reproductive activities				
Productive activities				
Community activities				

• Discuss the implications of the analysis on the on program design and implementation

# MODULE 4C: ACCESS AND CONTROL PROFILE

**Introduction:** Lack of information on access and control over resources and

benefits has led to false assumptions about what groups can accomplish and how they may benefit from particular projects. All types of work require resources. Engaging in work and utilizing resources usually generates benefits for individuals, households, and communities. The Access and Control profile helps delineate a group's access to and control over resources needed for work. The profile also helps to show whom has access to the benefits derived from work and the extent to which any group is able to exert control

over benefits.

**Objectives** Describe the use or importance of Access and Control Profile

Demonstrate the access and control frameworks used.

**Rationale:** the Access and Control profile allows analysis of resources and

benefits that can help planners to compensate for or increase a marginalized group's limited access and control within a project.

**Preparation:** Prepare the Access and Control framework for analysis on newsprint

or on A4 paper for each participant.

Also select a community where some filed practice can be conducted.

Materials: Newsprint

Marker pens

#### **PROCESS**

#### **STEP 1: Large Group**

- Ask participants the following questions:
- 1. What is Access and Control profile?
- 2. Why is it useful?
- Summarize the discussion on a newsprint for discussion.
- Use the following to summarize the discussion.

# **Access and Control Profile**

Access and control profile identifies resources and benefits associated with the productive and reproductive roles in question and whether men or women control and benefit them. Resources and benefits should be as broadly interpreted as necessary to adequately describe the community being analyzed. Besides physical resources such as land, capital, inputs, these can include less tangible resources as time, access to education etc.

The resources profile is used to identify;

• Resources of men and of women especially land, trees, equipment and inputs

- Benefits derived by women and by men from their use of resources, such as food, fuel, and income.
- Resource needs and constraints of men and women, especially with respect to those necessary for subsistence and income.
- Participation incentives for women and men in development program activities.

The resource profile answers the question:

- Who has what? Meaning whom has access and control over resources? Even if someone has user rights like land, control can be vested in the state, the forestry department, a village chief or other authorities.
- Who needs what? Meaning what resources are at risk or diminishing due to environmental degradation or development interventions, and how important are these resources to women and men for survival.

# **Step 2: Deciding on the resource categories**

- Access and control profile is usually used to delineate women's relations to resources and benefits from men's, but it could also be used for any marginalized subgroup within a community. For example, instead of creating categories of 'men' and 'women', categories could also be 'rural', urban', 'rich', 'poor', etc
- The trainer should decide, given a particular context, a group of men and women in a particular project. Select the category, rural, urban etc
- Participants should work with the trainer/facilitator to fill out the profile. Resources
  may include land, , seedlings, tools, cash, information, skills, etc. benefits may
  include, cash, skills, political power, poles, firewood etc.
- Ask the following critical questions to assist do the profile:

#### Resources

- What resources does each group have access to?
- What resources does each group have control over?
- What are the implications of this information for the project?
- How can the project help to increase a disadvantaged group's access to and control over resources?

#### **Benefits**

- What benefits does each group receive from work?
- What benefits do they each have control over?
- What are the implications for project activities?
- How can the marginalized group's access to and control over benefits be increased?

# Step 3

Practise using the following format

# **Access and Control Profile Matrix**

			Control				Access	
	Women	Men	Girls	Boys	Women	Men	Girls	Boys
Resources								
Benefits								

# **Influencing Factors**

While doing Activity, Access and Control profiles, it is often useful to consider what factors over time influence and change gender relations, division of labour and access and control over resources. Constraints and opportunities for promoting equity and empowerment presented by change s should be presented. Some factors to be aware of may include those in the table below:

# **Influencing Factors**

Factors	Impact	Opportunities	Constraints
Political			
Economic			
Cultural			
Educational			
Environmental			
Legal			
Out migration			
Religious			

# Process for conducting Activity, Access and Control Profile

- 1. The facilitator should prepare the framework in advance for the profiles
- 2. Decide on the site or project
- 3. Prepare a checklist of questions to be used to facilitate the discussions. The questions should be open ended as much as possible to assist elicit information
- 4. Men and women should be assisted to fill the profile separately
- 5. After the completion of the profile men and women should come together to discuss the results and the implications of the results on the planned or existing project

# **MODULE 4D: GENDER ANALYSIS MATRIX**

**Introduction:** Development practitioners often lack information as to how a

proposed project in natural resource management may affect or be affected by different roles in the community. The Gender Analysis Matrix (GAM) is a technique for identifying and analyzing gender roles in a community in order to assess the different impacts of projects on different people. It is essentially a visioning tool, allowing groups to predict changes. Additionally, use of the GAM begins a consciousness raising process which identifies and

challenges assumptions about gender roles.

**Objectives:** Describe the use of GAM as a technique in gender analysis.

Discuss the levels of analysis using the GAM.

Demonstrate the GAM format.

**Rationale:** The Gender Analysis Matrix is designed to facilitate community

discussions about project impacts for women, men, household and community in regard to labour, time, resources and culture. The GAM both tests and increases awareness of project's functioning in

relation to gender roles and responsibilities.

**Preparation:** Prepare the Gender Analysis Matrix on newsprint or on an A4 paper,

leaving the boxes blank, to be distributed to every participant. Select a community project where participants can conduct a

differential impact analysis using the GAM

Materials: Newsprint, marker pens

#### **PROCESS**

# **Step 1: Large Group**

- Ask participants to discuss how natural resources management projects affect women and men; positively or negatively?
- What implications does that have on the project?

# The GAM is based on the following principles

- Men and women are able to analyze how their lives (men and women) are being affected by the community.
- Gender analysis does not require the technical expertise of those outside the community
- Gender analysis is meaningful and can promote transformation if carried out by the people themselves; men and women
  - Summarise the responses on the newsprint and hold a discussion on issues raised.
  - Inform participants that the GAM is one technique of analyzing how the project impacts on men and women in a project

#### Step 2:

 Distribute the GAM structure to all the participants and display one on a flip chart stand or board or overhead projector as follows: on the structure are the four levels of analysis (women, men, household, community) and areas of analysis (labour, time, resources, resources, culture)

	Labour	Time	Resources	Culture
Women				
Men				
Household				
Community				
·				

- Select a project that participants may be implementing or they know about
- Participants should go through the matrix in the class before they go out to the community to practise the same.
- If it is done in the community, the community members then discuss the matrix and work with the facilitator to fill the boxes based on their expectations of the project activity
- Beginning at the first line of the matrix on 'women', the facilitator will want to ask the expected impacts of a project on women's labour, women's time, women's access to and control over resources and women's as well as men's status on cultural changes.
- After the matrix has been completed, the group should assign a (+) sign to those potential effects that are consistent with program goals and a (-) sign to those that are contrary to program goals. If the group is uncertain of the desirability of an outcome, a (?) may be assigned.
- Discuss with participants when the GAM can be used

#### When can GAM be used?

GAM can be used at different stages in the project cycle, to assess both the potential and the actual impact of an intervention on the community's gender relations. The objectives at each stage are as follows

- At the planning stage to determine whether potential gender effects are desirable and consistent with the program goals and objectives
- At the design stage where gender considerations may change the design of the project; or
- During monitoring and evaluation stages to address the broader program impacts

#### Notes to the facilitator

Effective use of the GAM requires men's and women's active participation. The process, if carried out at various stages of the project cycle, will raise questions and provide insights regarding the project's capability to incorporate the needs of men and women.

#### Notes on GAM

# GAM Analysis Tool 1: Analysis at Four 'Levels' of Society

- 1. The GAM analyzes the impact of development at four levels: **Women:** All women who are in the target group.
- 2. **Men:** This refers to all men in the target group or to all men in the community
- 3. **Household:** This refers to all men and women and children living together, even if they are not part of one nuclear family. The community could be allowed to define what a 'household' is to them
- 4. **Community:** everyone within the project area. The purpose of this is to extend the analysis beyond the family. The community also may define what constitutes a community

# **GAM Analysis Tool 2: Analysis of Four Kinds of Impact**

The GAM looks at impact on four areas:

- 1. **Labor:** This refers to changes in tasks (for example, fetching water from the river), the level of skill required (skilled or unskilled, formal education, training), labor capacity
- 2. **Time:** This refers to changes in the amount of time it takes to carry out the task associated with the project activity
- 3. **Resources**: this refers to the changes in access to resources (income, land, and credit) as a consequence of the project, and the extent of control of changes in resources for each group analyzed
- 4. **Socio-cultural Factors**: this refers to the changes in social aspects of the participant's lives, including changes in gender roles and or status as a result of the project

# Why GAM is Useful

- Designed specifically for community-based development workers: designed to fit
  in the reality of community-based work, is simple, flexible, and designed to
  accommodate changes over time
- **Simple and systematic**; uses familiar categories and concepts. Does not rely on unique or unfamiliar concepts but instead employs ones familiar to gender and development workers and the community.
- Transformational and technical. Designed to initiate a learning process the
  community and development workers gain knowledge and experience as they see
  gender issues emerging. GAM raises consciousness on gender inequalities through
  the design of the categories

- Fosters 'bottom-up' analysis through community participation. The process o analysis fully involves men and women
- Consider gender relations between women and men, as well as examining what each other category experience. Use of the categories of household and community, as well as of women and men is one way of trying to draw out the connectedness of gender relations. It helps move the gender and development workers away from a tendency to see men and women
- Levels of analysis can be added to in order to suit particular interventions: the levels of analysis can incorporate various groups within the community, e.g. a project targeting girl children can include them as a category
- Can be used to capture changes over time
- Can be used for participatory impact assessment

# **Potential Limitations**

- Needs a good facilitator
- Some factors can get lost because categories have many aspects
- Requires careful repetition in order to consider changes over time
- Does not seek out the most vulnerable community members
- Excludes macro-and institutional analysis

# MODULE 5: INTEGRATING GENDER IN THE PROJECT PLANNING CYCLE

**Introduction:** Mainstreaming or integrating gender in project planning and

implementation has been one of the major problems for project managers and implementers. Mainstreaming is best done by

integrating gender issues and concerns which have been determined during the gender analysis in the project planning cycle. This assists in ensuring that all the steps of the planning cycle have included information therefore making the project gender sensitive. When developing indicators, gender sensitive indicators will be picked

since gender issues have been included in the planning.

**Objectives**: Identify the steps in the project planning cycle

Describe the type of issues or information that must be included in

each cycle to ensure gender sensitivity

**Rationale:** The project planning cycle is a suitable way of integrating gender

issues in a project. In the planning process effort is made to close the gaps between what women and men need, and what development delivers. The factors which determine who undertakes what

activities, and with what resources, are critical. Gender analysis data or information will have identified areas which may need to change.

**Preparation:** Have some gender analysis information specifying gender issues

which can be used as a basis for engendering the project cycle

Materials: Newsprint

Marker pens

#### **PROCESS**

#### **Step 1: Large Group**

- Ask participants to discuss in plenary the steps in project planning
- Summarise the steps on the newsprint and have a short discussion on the developed steps

# Steps in project planning cycle

- □ Needs assessment/Situation analysis
- Setting priorities
- Developing objectives
- □ Implementation of activities
- □ Budgeting
- □ Monitoring and evaluation

# **Step 2: Small Groups**

- □ Divide participants into small groups to discuss how to integrate gender in the project planning cycle. Before they go into the groups, do a summary of the steps in the project planning cycle on a flipchart for clarity. Ask them to discuss in the groups some guidelines they will use in each of the steps to ensure that program planning is gender responsive. (*Participants do not have to be in their institutional groups for this exercise*).
- ☐ Have each group write their responses on flipchart for discussion in the large group.

#### Step 3. Large Group

- □ Summarize the main points for each step on the newsprint. Emphasize that the information to be included in each step will depend on the type of project being implemented by the institution but however, indicate that there are general indicators for each of the steps.(this will be discussed later in this module)
- ☐ The trainer can use the following summary to compare and supplement the information participants have developed:

#### **Gender Dimensions in Project Identification**

#### 1. Assessing gender needs

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

#### 2. Defining general project objectives

- ☐ Are project objectives explicitly related to both men's and women's needs?
- Do these objectives adequately reflect those needs?
- ☐ Have women and men participated in setting those objectives?
- ☐ Have there been any earlier efforts?
- ☐ How has the present proposal built on earlier activity?

#### 3. Identification of possible negative effects

- Might the project reduce women's access to or control of resources and benefits?
- ☐ Might it adversely affect women's situation in some other way?
- □ What will be the effects on women in the short and longer term?

#### **Gender Dimensions in Project Design**

#### 1. Project Impact on women and men's activities

- Which of these activities (production, reproduction and maintenance, socio-political) does the project affect?
- Is the planned component consistent with the current gender denomination for the activity?
- ☐ If it is planned to change the men's or women's performance of that activity, i.e.

focus of activity, remunerative mode, technology, mode of activity) is this feasible,, and what positive or negative effects would there be on women? If it does not change it, is this a missed opportunity for women's (for example) roles in the development process? How can the project design be adjusted to increase the above-mentioned positive effects, and reduce or eliminate the negative ones? 2. Project impact on women's access and control How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the production of goods and How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the reproduction and maintenance of the human resources? How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the socio-political functions? What forces have been set into motion to induce further exploration of constraints and possible improvements? How can the project design be adjusted to increase women's access to and control of resources and benefits? **Gender Dimension in Project Implementation** 1. Personnel Are project personnel aware of and sympathetic towards men and women's needs (gender)? Are women used to deliver the goods or services to men and women beneficiaries? Do personnel have the necessary skills to provide any special inputs required by men and women? What training techniques will be used to develop delivery systems? Are there appropriate opportunities for men and women to participate in project management positions? Remunerative mode, technology, mode of activity) is this feasible,, and what positive or negative effects would there be on women? If it does not change it, is this a missed opportunity for women's (for example) roles in the development process? How can the project design be adjusted to increase the above-mentioned positive effects, and reduce or eliminate the negative ones? 2. Organizational structures Does the organizational form enhance men and women's access to resources? Does the organization have adequate power to obtain resources needed by men and women from other organizations? Does the Organization have the institutional capability to support and protect men and women during the change process? Are the organization's delivery channels accessible to men and women in terms of

#### 3. Operations and logistics

- personnel, location and timing? Do control procedures exist to ensure dependable delivery of the goods and services
- Are there mechanisms to ensure that men or women do not usurp the project resources or benefits?

#### **Finances**

- Do funding mechanisms exist to ensure program continuity?
- Are funding levels adequate for proposed tasks?
- Is preferential access to resources by men or women avoided?
- Is it possible to trace funds for women and men from allocation to delivery with a fair degree of accuracy?

#### **Flexibility**

- Does the project have a management information system which will allow it to detect the effects of the operation on men and women?
- Does the Organization have enough flexibility to adapt its structures and operations to meet the changing or newfound situations of men and women?

# **Gender Dimension in Project Evaluation**

#### 1. Data requirements

- Does the project's monitoring and evaluation system explicitly measure the project's effects on men and women?
- Does it also collect data to update the Activity Analysis and the Women's Access and Control Analysis?
- Are women and men involved in designating the data requirements?

#### 2. Data collection and analysis

- Are the data collected with sufficient frequency and disaggregated by gender so that
- Are the data collected with sufficient frequency and disaggregated by gender so the necessary project adjustments could be made during the project?

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

  Are women and men involved in the collection and interpretation of data?

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

  Are key areas of WID/GAD research identified?

# **Step 3: Large Group**

#### **Developing Indicators for Monitoring and Evaluation**

- In the large group, indicate that the gender sensitive indicators will be drawn from the gender responsive issues that have been integrated in each step in programming.
- In buzz groups, ask participants the following questions?
- 1. What is an indicator?
- 2. Why are indicators important in a project?
- When should indicators be formulated?
- Summarize the buzz group discussions on a flipchart and discuss the main points. Allow participants to ask questions and emphasize the importance of gender indicators and desegregation of information to ensure that the impact of the project on men and women is assessed
- Summarize the session with a lecturette on indicators, levels of data collection for development of gender sensitive indicators and categories of indicators.

#### What are indicators?

- □ Communicate information about progress towards particular goals
- □ Provide clues about matters of larger significance
- □ Make perceptible a trend or phenomenon that is not immediately detectable

Note: The choice of indicators depends on the purpose for which they are required and the audience

# Levels of data collection and analysis for development of gender sensitive indicators in programs

- 1. Contextual analysis: This information is needed to understand the context of project and gender related elements of the specific project e.g. Other tools related to contextual analysis may deal with issues of access and control of resources and benefits between men and women
- 2. Social and gender analysis: This will include gender division of labor, gender related access to and control over resources, views and expectations of women and men regarding the project
- **3. Institutional analysis:** This should yield information on institutions that will be implementing the project e.g. identification of institutional constraints and opportunities for implementing the project, perceptions and attitudes regarding gender issues among both men and women staff of the institutions concerned, attitudes of the local community towards the relevant institutions, capacity and capability of the institution implementing the project e.g. existence of gender policy within the institutions
- **4. Project Analysis:** this information is necessary to analyze the impact of project interventions on the community e.g.
  - □ Project log frame this enables understanding of the relationship between goal, objectives, input, output and benefits and gender responsiveness in this process
  - ☐ Benefit analysis to demonstrate which member of household or community benefit for particular project activities
  - Gender analysis to show the impact of a project in terms of labor, time, resources, values for men, women, youth
  - □ Cost -effect analysis to compare costs to a community, the ratio of net benefits to costs or cost per unit

# **Categories of Indicators**

Three categories may be used to determine whether progress is being made towards the project objectives. The indicators of course require baseline data to determine the nature and rate of progress towards the objective

# 1. Process Indicators

Dimensions	Characteristics
Capacity building	What new skills have been acquired?
	What local knowledge has been identified and used?
	What institutions have been strengthened?
Organizational skills	<ul> <li>Development of groups capabilities in identifying problems</li> </ul>
	<ul><li>Implementing programs</li></ul>
	<ul><li>Dealing with conflict</li></ul>
	<ul> <li>Building consensus</li> </ul>
	<ul><li>Negotiating</li></ul>
	<ul><li>Solving problems</li></ul>
Leadership	<ul> <li>We have identified local organization and participation as critical</li> </ul>
	elements in project success and in building partnerships for
	development purposes
	<ul> <li>The emergence of local leadership committed to these goals and able</li> </ul>
	to mobilize and organize local groups is an essential element in
	strengthening local communities
Partnerships	<ul> <li>Strengthen development efforts by building relationships between</li> </ul>
	local communities and external agents, regional, national and even
	international;
	<ul> <li>Help bring projects to fruition and serve as indicators that the project</li> </ul>
	is not likely to wither from isolation and neglect.

# 2. Impact Indicators

Dimensions	Characteristics
Productivity	<ul> <li>Improved productivity may also take the form of decreased labor time for the same output;</li> <li>It can often be determined by measuring changes in income.</li> </ul>
Welfare	Has many dimensions: One or two welfare indicators most relevant to the type of project, e.g. health, educational opportunity, nutrition, housing, sanitation, can be selected to reveal changes in individual and/or community well-being
Equity	<ul> <li>Indicates how broadly based the improvements in welfare and productivity are;</li> <li>Evaluates the effectiveness with which a project is addressing the entire group or the entire community's needs in an equitable way;</li> <li>Another might focus on a group, which is particularly disadvantaged.</li> </ul>
Environment	<ul> <li>Requires measures of the ways a project is affecting soil fertility, water quality and retention, erosion, natural vegetation and biodiversity;</li> <li>Measures appropriate to the particular setting and project are selected.</li> </ul>

3. Sustainability Indicators			
Dimensions	Characteristics		
Replicability	If there is spontaneous replication, so much the better.		
	The project is spreading on the basis of its own merits without an outside organizer or initiator		
Local ownership	If local people find it useful, want it to continue, and are prepared to assume responsibility for assuring its continuation, local ownership has been achieved and so has a new level of local empowerment		
Cost effectiveness	Three types of cost-effectiveness, each designed to meet the needs of different kinds of projects include:  Measures of costs in comparison to community resources;  The ratio of net benefits to costs; and  The ratio of per-unit benefits to costs.		
Environmental suitability	If the project or program has, on balance, a negative impact on the environment it may bring short-term benefits (such as some types of mining) but is not sustainable over the long-term. Many projects have both positive and negative effects on the environment; these must be weighed in each situation.		

# MODULE 6: ANALYSIS OF INSTITUTIONAL GENDER POLICY ISSUES AND GAPS

**Introduction:** Many organizations are now taking up gender as an important aspect

in their programming since there is a realization that integrating gender improves performance indicators. However, there are a number of reasons why institutions are not able to fully mainstream gender. This module is designed to assist program managers do an analysis of the gaps that need to be addressed so that an institution

can fully mainstream gender

**Objectives:** Describe the characteristics of institutions

Identify institutional gender gaps and issues, causes and effects on

men and women

**Rationale:** The session will assist participants identify gender issues and gaps in

their institution. The issues and gaps identified will assist in creating

awareness on the gender imbalances and ways of reducing the

imbalances.

**Link:** This session also builds on how gender socialization influences

gender behaviour and gender relations in institutions. The

information generated during this session can be used as a basis to develop further research on gender issues or to justify policy change.

**Preparation:** Write session objectives on the flipchart.

Prepare separate rooms for participants to discuss in institutional

groups if you have more than one institution.

**Materials:** Flipchart stand and paper, marker pens

#### **PROCESS**

#### 1. Large Group

- □ Point out the objectives of the session, explain the rationale and link the session to with the session on how gender socialization influences gender relations in organizations
- ☐ In the large group ask participants the following question:

If you were told that an institution is gender sensitive, what will you find in place that will make the institution gender sensitive?

Either

- □ Participants can either buzz in pairs or in groups of three as they are sitting and write on index cards the characteristics of a gender sensitive organization.
- □ Summarize on the newsprint what the participants have written on their index cards.

Or

What are the characteristics of a gender sensitive institution and summarize the main points on the newsprint?

 Summarize the plenary discussions on newsprint. Some of the characteristics may include the following:

# Some of the characteristics may include A gender policy in place Equal salary and benefits for men and women Maternity leave Paternity leave Equal opportunity for training and staff development for men and women Promotion on merit not on gender etc No sexual harassment Equal representation of men and women in decision making positions Equal opportunity employer

- ☐ In institutional groups (if there is more than one institution), participants will be asked to examine whether the institution has the characteristics that will make it gender sensitive. They will use the format below and for each characteristic, they will use the following score:
  - 0 Characteristic does not exist
  - 1 Exists but is not followed
  - 2 Exists and is followed

Characteristic	Rating
Gender policy in place	
Equal salary and benefits for men and women	
Promotion on merit not on gender	
Equal representation in management positions	
Maternity leave	
Paternity leave	

☐ The characteristics that score the least; 0-1, rating are the gender gaps or issues that need to be addressed

# **Step 2. Small Groups**

- ☐ Using the following table, participants should analyse the causes and effects of the identified gender gaps on men and women in the institution and the possible action or interventions
- □ Each group should write their discussions on flipchart for presentation.

Gap	Causes	Effects		Possible interventions
		Women	Men	
1				
2				
3				
3				
4				

#### **Notes for the Trainer**

Some of the **causes** will include:

- . No gender policy in place
- . Gender policy exists but is not followed
- . No career or staff development policy
- . Policy is silent on gender
- . No gender skills among staff

Some of the **effects** on men and women will include:

- . Low staff morale
- . High staff turnover because of inequalities
- . Inequality in resource allocation for men and women in programs thus widening the gender imbalances
- . No gender reflection in project design
- . Discomfort and stress for women if sexually harassed
- . Low performance and productivity on either men or women
- . Poor team spirit

#### Step 3. Large Group

- ☐ Have each group present their group output
- Trainer will summarize the main causes and effects as presented by the groups
- □ Summarise the main points on possible interventions. If there is more that one institution, do separate summaries for each institution.

# MODULE 7: ANALYSIS OF INSTITUTIONAL PREPAREDNESS TO MAINSTREAM GENDER IN POLICY AND PROGRAMS

**Introduction:** It is important to recognize that when introducing change in an

institution, there are certain factors that will determine how that change is taken and managed. Institutional preparedness is a process of analyzing the strengths, limitations and opportunities in an organization that will determine the preparedness of an institution to introduce change like gender mainstreaming and manage it. The process leads to development of developing an action plan

**Objectives** Identify possible strategies for mainstreaming gender in an institution

Analyse institutional preparedness to mainstream gender institutional

policy

**Rationale:** This session will assist participants to analyse readiness to

mainstream gender in their programs and projects. The process will involve analysing strengths, weaknesses opportunities and threats if

gender has to be mainstreamed.

**Link:** This session brings together all the possible interventions discussed

in the various sections of this session for analysis.

**Prepare on a flipchart the recommended interventions on the** 

following areas discussed in this session:

Gender gaps and issues

□ Sexual harassment

Programming

Prepare a format of the SWOT Analysis on a flipchart to demonstrate

the method to be used for this analysis

**Materials:** Flipchart paper, marker pens, and index cards

#### **PROCESS**

#### **Step 1: Large Group**

Summarize the gaps and strategies identified in the earlier sessions. Divide participants into groups to analyse the possibilities and potential of their institution to mainstream gender. The Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis could be used to do this exercise.

**SWOT analysis** means evaluating the organization's internal strengths and weaknesses and the opportunities and threats associated with the organization's external environment. SWOT analysis emphasizes that the fit between an organization and its environment is of paramount importance, and the organization's strategy should be built around this match.

#### **Step 2: Small Groups**

□ Have participants in their institutional groups to do the SWOT analysis for each proposed intervention. If they are from one institution, divide them into groups of maximum six people for group discussion.

Proposed Interventions	Strengths	Weaknesses	Opportunities	Threats
Gender Policy				
Sexual harassment				
Programming				
Other				

#### **Definition of Terms**

- Strength is ability or attribute that the organization possesses which has the potential of giving it a distinctive competence. Potential strengths may rest in the organization's financial capability, its management skills, cost advantages, proprietary knowledge, and/or its marketing approaches.
- A weakness is a skill or attribute that the organization lacks or one that it has not developed and at which it performs poorly.
- An opportunity is an environmental circumstance that is potentially beneficial for an organization. For example, an organizational recognition of gender as an important aspect in programming provides an environment for project people to be trained on gender and also allocation of resources to integrate gender in the programs.
- A **threat** is an environmental factor that could be potentially harmful to the organization. The increasing demand by donors that organizations must show how they are integrating gender, has prompted many organizations to want to understand what gender is an how it can be integrated in their programs rather than lose funding.

#### Step 3: Large Group

- ☐ Have groups present their discussion by institution or by group. Allow for discussion at the end of each presentation.
- Draw out the main areas of intervention as presented by the groups

# **Step 4: Small Groups**

- ☐ Have participants discuss a plan of action for their institution to implement the recommended actions.
- ☐ Emphasize that the plan of action must be realistic considering the existing policy, institutional willingness to mainstream gender, existing gender skills etc. also indicate that mainstreaming gender might require financial resources. Secondly, it means change in policy that could be threatening the status and culture of the institution.

# **Step 5: Large Group**

- ☐ Have groups present their plans
- □ Allow time for discussion of each plan

# **COMPASS Publications**

Document Number	Title	Author(s)	Date
Document 1	COMPASS Year 1 Work Plan	COMPASS	Jul-99
Document 2	COMPASS Small Grants Management Manual	Umphawi, A., Clausen, R., Watson, A.	Sep-99
Document 3	Year 2 Annual Work Plan	COMPASS	Dec-99
Document 4	July 1 - September 30, 1999: Quarterly Report	COMPASS	Oct-99
Document 5	Training Needs Assessment: Responsive Modules & Training Approach	Mwakanema, G.	Nov-99
Document 6	Guidelines and Tools for Community-Based Monitoring	Svendsen, D.	Nov-99
Document 7	Policy Framework for CBNRM in Malawi: A Review of Laws, Policies and Practices	Trick, P.	Dec-99
Document 8	Performance Monitoring for COMPASS and for CBNRM in Malawi	Zador, M.	Feb-00
Document 9	October 1 - December 31, 1999: Quarterly Report	COMPASS	Jan-00
Document 10	Workshop on Principles and Approaches for CBNRM in Malawi: An assessment of needs for effective implementation of CBNRM	Watson, A.	Mar-00
Document 11	January 1 - March 31, 2000: Quarterly Report	COMPASS	Apr-00
Document 12	Thandizo la Ndalama za Kasamalidwe ka Zachilengedwe (Small Grants Manual in Chichewa)	Mphaka, P.	Apr-00
Document 13	Njira Zomwe Gulu Lingatsate Powunikira Limodzi Momwe Ntchito Ikuyendera (Guidelines and Tools for Community-based Monitoring in Chichewa)	Svendsen, D Translated by Mphaka, P. and Umphawi, A.	May-00
Document 14	Grass-roots Advocacy for Policy Reform: The Institutional Mechanisms, Sectoral Issues and Key Agenda Items	Lowore, J. and Wilson, J.	Jun-00
Document 15	A Strategic Framework for CBNRM Media Campaigns in Malawi	Sneed, T.	Jul-00
Document 16	Training Activities for Community-based Monitoring	Svendsen, D.	Jul-00
Document 17	April 1 - June 30, 2000: Quarterly Report	COMPASS	Jul-00
Document 18	Crocodile and Hippopotamus Management in the Lower Shire	Kalowekamo, F.	Sep-00
Document 19	Cost-Sharing Principles and Guidelines for CBNRM Activities	Moyo, N.	Sep-00
Document 20	Workplan: 2001	COMPASS	Nov-00
Document 21	July 1 - September 30, 2000: Quarterly Report	COMPASS	Oct-00

Document 22	Opportunities for Sustainable Financing of CBNRM in Malawi: A Discussion	Watson, A.	Nov-00
Document 23	Framework for Strategic Planning for CBNRM in Malawi	Simons, G.	Nov-00
Document 24	Kabuku Kakwandula Ndondomeko ya Thumba Lapadera la Wupu wa	Umphawi, A., Clausen, R. & Watson,	Dec-00
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Document 26	October 1 - December 31, 2000: Quarterly Report	COMPASS	Jan-01
Document 27	COMPASS Grantee Performance Report	Umphawi, A.	Mar-01
Document 28	January 1 - March 31, 2001: Quarterly Report	COMPASS	Apr-01
Document 29	Natural Resource Based Enterprises in Malawi: Study on the contribution of	Lowore, J.	Apr-01
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	management in Machinga District		
Document 30	Proceedings of the First National Conference on CBNRM in Malawi	Kapila, M., Shaba, T., Chadza, W.,	Jun-01
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Document 31	Natural Resource Based Enterprises in Malawi: Action Plans	Watson, A.	Jun-01
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Document 33	Media Training for CBNRM Public Awareness	Kapila, M.	Jun-01
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Document 36	Workplan: 2002	COMPASS	Oct-01
Document 37	July 1 - September 30, 2001: Quarterly Report	COMPASS	Oct-01
Document 38	COMPASS Performance and Impact: 2000/2001	COMPASS	Dec-01
Document 39	Coordination of CBNRM in Malawi: Financing Options	Watson, A.	Jan-02
Document 40	Performance Monitoring for CBNRM in Malawi	CBNRM Working Group	Oct-02
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Document 47	Charcoal, Chiefs and Chambo: Status of CBNRM Policies in Malawi	Trick, P. & Manning, L.	Jun-02
Document 48	April 1 - June 30, 2002: Quarterly Report	COMPASS	Jul-02
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Document 51	Workplan: 2003	COMPASS	Dec-02
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Document 60	January 1 – March 31, 2003: Quarterly Report	COMPASS	Apr-03
Document 61	Advanced GIS for Natural Resource Managers	Craven, D.	Apr-03
Document 62	Introduction to Appreciative Inquiry	Msukwa, C.A.P.S., Svendsen, D.S. &	Apr-03
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Internal Report 2	Reference Catalogue (2nd Edition)	COMPASS	Feb-01
Internal Report 3	Workshop on Strategic Planning for the Wildlife Society of Malawi	Quinlan, K.	Apr-00
Internal Report 4	Directory of CBNRM Organizations (2nd Edition)	COMPASS	Jan-01
Internal Report 5	Proceedings of Water Hyacinth Workshop for Mthunzi wa Malawi	Kapila, M. (editor)	Jun-00
Internal Report 6	COMPASS Grantee Performance Report	Umphawi, A.	Jun-00
Internal Report 7	Examples of CBNRM Best-Practices in Malawi	Moyo, N. and Epulani, F.	Jul-00
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