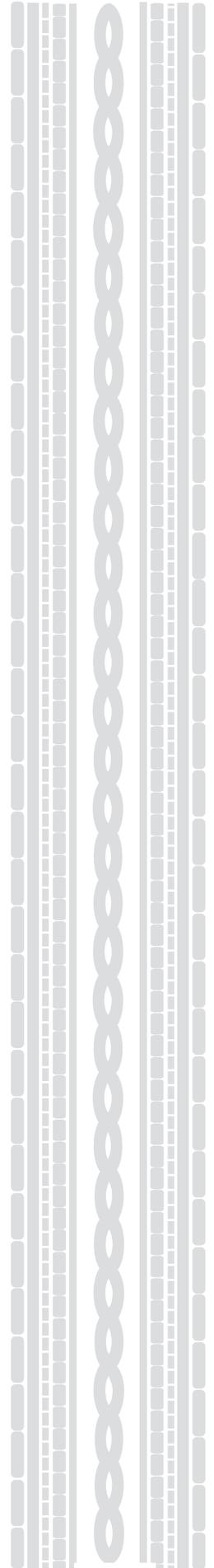


BOOKLET #3

MODEL SESSIONS: BASIC KNOWLEDGE ABOUT WID, GAD, AND PACA

Six session plans provide basic knowledge about Women in Development (WID), Gender and Development (GAD), and Participatory Analysis for Community Action (PACA). In addition to an overview session, there is an introductory session on the systems approach to development, skills training sessions for Contextual Analysis and the Gender Information Framework, and two methods of introducing PACA.



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WID, GAD, AND PACA

RATIONALE

This session provides a basic understanding of the focus of Women in Development (WID), the development of Gender and Development (GAD), and how they relate to each other. It also provides definitions used in the Peace Corps, including the gender-sensitive participatory methodology called Participatory Analysis for Community Action (PACA).

TIME



1/2 to 1 hour

GOALS AND OBJECTIVES

GOAL

To explore the concepts of development, Women in Development, Gender and Development, and PACA

OBJECTIVES

1. To develop a common definition of development.
2. To clarify the distinctions between Women in Development and Gender and Development, sex and gender.
3. To define the key elements of the gender-sensitive participatory methodologies called PACA.

TRAINER PREPARATION



1. If not thoroughly familiar with WID and GAD approaches, read the background reading, "Gender and Development" in this booklet. Keep in mind that the Peace Corps does not employ individual interviews when doing gender analysis of family structures. Focus groups are used. Study the vocabulary list.
2. Prepare flip charts.
3. Copy handouts.
4. Read session plan and provide examples from your own experience.

MATERIALS



- Blank flip chart paper
- Marking pens
- Masking tape

HANDOUTS

- Gender and Development Vocabulary and Definitions
- Optional: Sex and Gender
Development Approaches

FLIP CHARTS

- Pendulum Model
- Development Approaches
- Gender and Sex

PROCEDURE

I. INTRODUCTION (1-5 minutes)

Explain the goals of the session.

II. DEVELOPMENT APPROACHES (30-45 minutes)

- A.** Recognize with the group that all participants come to this workshop with different development experiences. Begin by looking at some definitions of development. Ask,

What words or phrases does the word **DEVELOPMENT** bring to your mind?

On a blank flip chart, list words or phrases that participants suggest.

Definitions will probably include economic improvement, improvement in quality of life (health, housing, employment, opportunities, security, etc.)

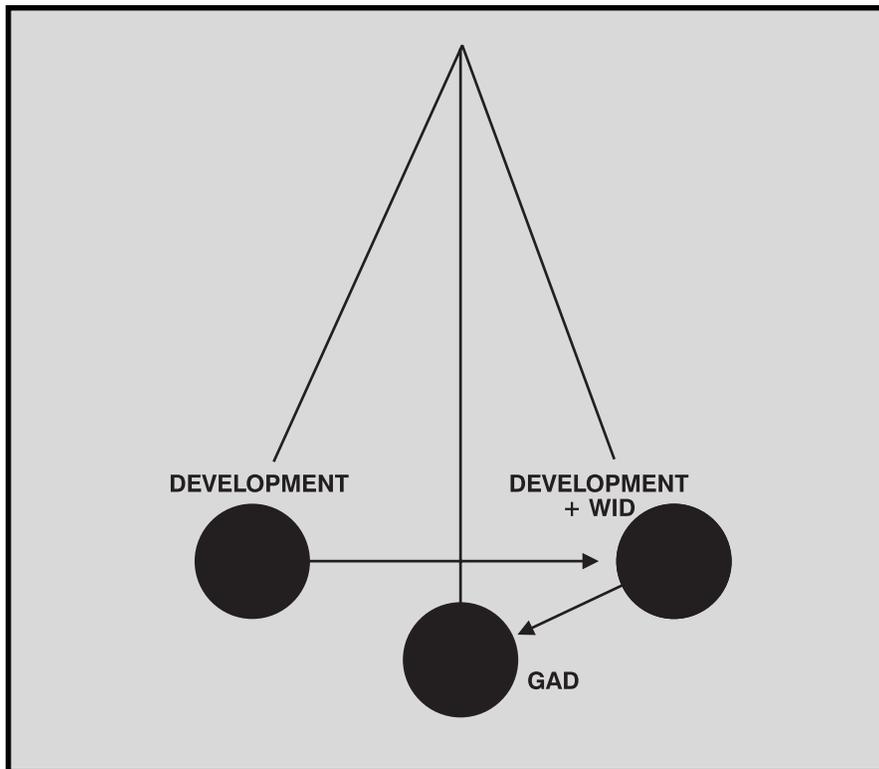
Leave the definitions posted; mention you will come back to them.

- B.** Use pendulum model (on flip chart) to explain:

1. Original “development approaches” were generally designed by men who talked to men who worked with men. The projects were implemented by men who assumed that the projects would meet women’s needs, too.

These often included “technological” packages, such as a new type of rice or another product, that had been developed at an experimental farm somewhere. It was introduced to farmers; they not only had to learn to work with the new product, but also to buy other required items, such as fertilizer, pesticides.

The theory was basically to look at a single way to increase income to poor (usually rural) people.



2. A reaction to this approach was to look at women as a separate group. This came about because women were often left out of development discussions, analysis, and resulting projects. Projects often either did not benefit women or, in some cases, actually left them worse off. The Women in Development movement ensured that women were recognized as important in the development process. Since women's needs and concerns had not been identified in the past, women were singled out, studied, and special funds were provided for "women's projects."

This approach developed excellent information on women's roles and needs but no relational data for how they compared to men. For example, women were found to work very long days, often 12-hour days. But how many hours did men work? And, just as importantly, what tasks did men and women each do? How did their work loads relate to each other, depend upon each other's, and each contribute to the family's well-being?

In fact, on this side of the pendulum swing, we still had traditional development approaches but we added women's projects; however, they were usually separate projects.

C. Introduce Gender and Development:

1. Gender and Development is an approach that looks at women as an integral part of the family, community, and larger society. Through various gender analysis techniques, the roles and rights of both women and men are studied in order to determine how development interventions may be made most effectively. As the Peace Corps usually works at the community level, the basic unit of analysis is the family.

By analyzing how the family system works within its cultural context, including the roles, rights, and responsibilities of both women and men, and boys and girls, projects can be designed to address the appropriate family members with some sense of how the project might impact on the total family system.

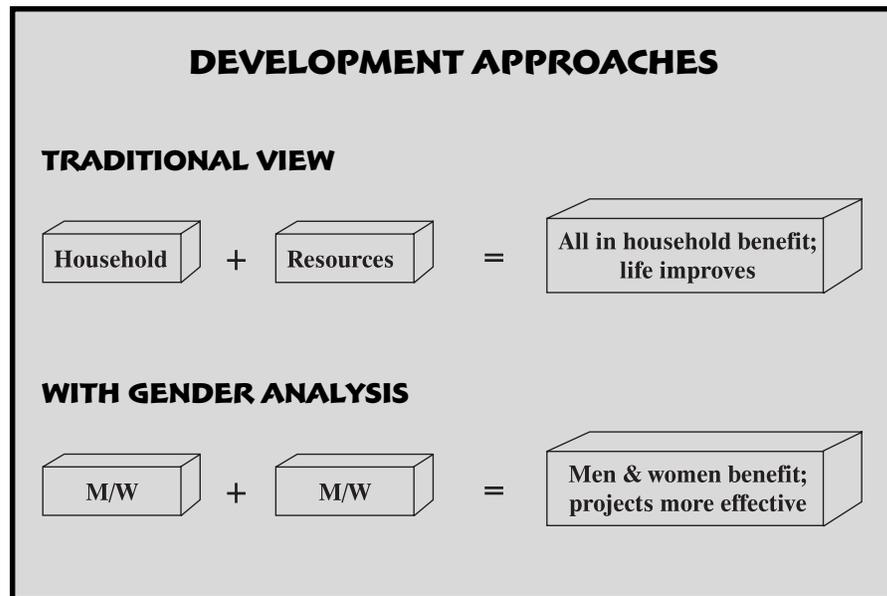
2. Using techniques called “gender analysis”, the family system is studied in terms of:
 - access to and control over income from various sources;
 - access to and control over resources;
 - implications for educational levels;
 - implications for use of time; and
 - labor allocation.

For example, without knowing how money is earned and spent, it is hard to know what kind of additional income will benefit family members. There are different expenditure patterns for men and women. In general, men tend to use their income for agricultural/production inputs (fertilizer, pesticides, new machinery) and entertainment. Women tend to use money at their disposal for food, health care, and education. However, to be sure, the culturally defined patterns of access to and control over income from various sources in the families who are the beneficiaries of a development project must be analyzed.

3. The goal of this approach is effective and sustainable projects, because the project is designed for the specifics of the family structures. This type of development cannot be based on guesses, or old data. Everywhere in the world, families are changing: there are more female-headed households due to wars, out-migration for work, etc. Situations change, such as the return of Basotho men from the mines of South Africa: they now need to fit into the farming system in Lesotho previously run by the women in their absence.

The focus of Gender and Development is sustainable development interventions, not equity issues.

- D. Look at these approaches with another diagram and some examples (Use flip chart “Development Approaches”). Distribute optional handout “Development Approaches,” if used.



1. Traditionally, it was thought that if you add resources to “a household,” all in the household will benefit; life will improve for everyone. It is flawed to think that meeting the needs of one family member will automatically help all members.

Example 1:

Trainer note: This example is one of two possible situations for an activity in the Introduction to a Systems Approach session plan. Do not use it here if you will use it later. Select another example for here.

A good example is a Philippine rice project. The goal of this project was to improve the family income. To do this a new strain of rice was introduced which produced more rice per acre. It was accepted and grown, and after three years, a follow-up study showed that despite the fact the rice had been accepted, family income had gone down. On closer examination, it was discovered that the new rice had short stalks and so left less rice straw after harvesting. Harvesting took more time because there was more rice. The additional income from the rice did not make up for the loss of income from the women’s mat and basketry making from rice straw. They had less straw to use, but also less time because it was their task to do post-harvesting tasks: removing the rice from the straw, etc., and they now had much more rice to work on.

Example 2:

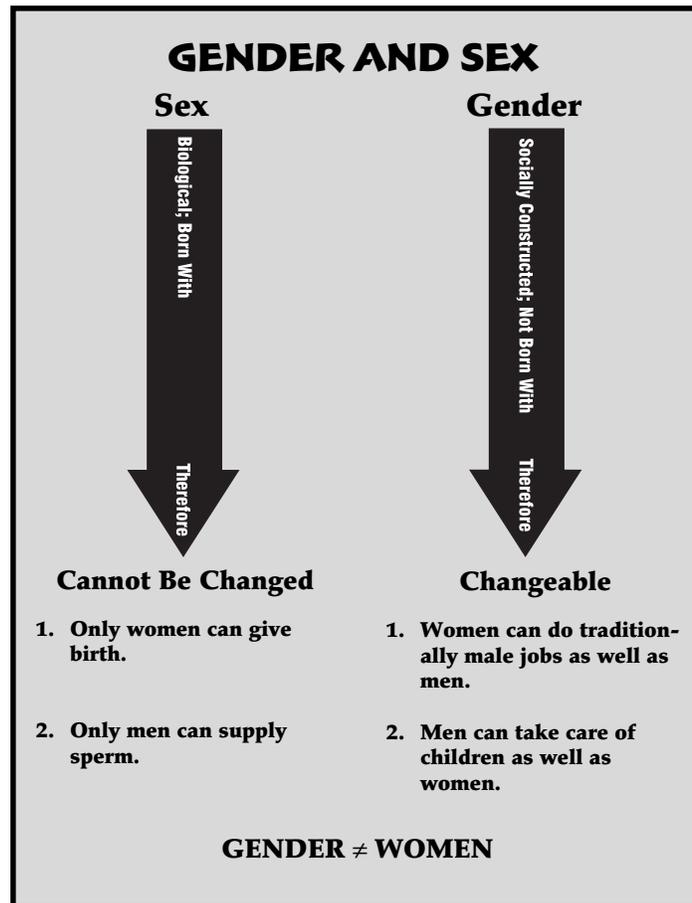
Volunteers and counterparts in a heifer project determined that family well-being would be well-served by providing another cow to each family. Since the cows grazed for food, it was assumed that one more cow wouldn’t adversely affect family expenses, yet provide additional milk, milk-products, or beef for income. However, the roles of family members were not taken into account in terms of the maintenance of the cows. The women were responsible for the milking, preparing milk-products for sale, and for taking the cows to and from the pastures each day. An additional cow would add significant amount of work to their daily schedule, severely limiting a caper and mushroom pickling project that had become a good income-generating activity. Without the women’s input into the decision whether or not to receive another cow, the heifer project potentially could have met resistance, or if forced on them, adversely affected family income if the caper and mushroom project had to be abandoned.

2. Revisiting the traditional view of development towards family well-being, we know we need to find out the roles, rights and responsibilities of the individual family members to be able to determine how a development project will impact on the family as a whole, as well as the individuals within the family.

Gender analysis of family structures can be very invasive and inappropriate if carried out through individual interviews incorrectly. One way the Peace Corps has introduced this type of analysis is through participatory activities in which groups of men and women, boys and girls, describe aspects of their lives. By describing their daily activities, drawing maps of their communities, and developing seasonal calendars of all the tasks, social events, expenses, illnesses, and other aspects of their lives, it is possible to understand how the family units and the community function. These activities in focus groups are not so invasive as personal interviews which would be culturally inappropriate almost everywhere in the world. The participatory activities which are conducted in gender-sensitive ways are called PACA: Participatory Analysis for Community Action. We will learn more about those later.

III. DEFINITIONS (10-15 minutes)

- A. Ask, How many of you have used the term “gender” before coming to this workshop? What does gender mean?
- Using the flip chart “Gender and Sex”, clarify the difference between the terms sex and gender. Distribute optional handout “Gender and Sex,” if using.



What are some examples of gender roles which you have seen men have in one place (or instance) and women in another?

- In some villages both men and women use machetes. But women are not allowed to cut the plants to thatch the roof; only men do that.
- In some countries men are tailors, women are not. Women may do handwork, like knitting or crocheting, but they do not use sewing machines.
- Others:

- Is changing gender roles what we are about???** No. What we want to do through gender analysis is **understand** who does what so that we can accurately gauge the impact of changes development projects may bring **and** so we can accurately target who needs what types of training. Gender roles change over time as families adjust to new pressures and opportunities. This may also occur

as an unintended result of a project, but it is not the primary goal of a GAD approach.

GAD philosophy is understanding the family system within its contexts. We will learn more about that in a session entitled “Introduction to a Systems Approach.”

3. Women in Development Offices and funding for girls’ and women’s activities remain critical because women and girls are still often left out of the development picture. WID coordinators and committees play the role of ensuring that women’s needs and priorities are kept visible, that project reporting indicates in what ways women’s and girls’ needs are addressed, and that when funding for specific girls’ or women’s activities are needed, including those identified through a GAD approach, there are funds for them.

V. SUMMARY (5 minutes)

Distribute “Gender and Development Vocabulary and Definitions” handout.

Review the definitions: development
 sex/gender
 WID/GAD/PACA

GENDER AND DEVELOPMENT

Development is an investment in the future. The links between people and development efforts include food security and nutrition, energy, employment, income, health, education, and sustainable agriculture and natural resources. These links are especially vital to the rural and urban poor. It is increasingly recognized that the socio-economic needs of these women and men must be a priority in any sustainable strategy to resolve development problems.

Increasingly, development policies have begun to move away from a strictly production and industrial sector focus towards a development approach which acknowledges the links between resources and people. Current efforts are designed to address the problems of urban and rural poverty, promoting local people as the *agents* as well as beneficiaries of development activities.

Planning for *people-centered* development requires more precise information about who the people are. They are not a homogeneous group. The people are comprised of women and men. The “poor” are poor women and poor men. The “children” are girls and boys. Everywhere, and within every socioeconomic group, the lives of women and men are structured in fundamentally different ways. A gender-based division of labor is universal; but it differs by culture, place, ethnic group, and class. Therefore, information is not precise enough for development project planning if it is not disaggregated by gender.

Increasingly, gender-disaggregated information is used in international aid development because of its importance, and because many development professionals now have access to the necessary information and training in gender analysis.

THE IMPLICATIONS OF CONSIDERING GENDER IN DEVELOPMENT

Gender-disaggregated information reveals what women and men know, what they do, and what they need. Without such information development efforts may not be appropriately designed, risking failure and negative impacts. Whether women, men, or both should be participants in specific development activities is a highly contextual question. The answer depends on the roles and priorities of the women and men within specific locations. Using gender analysis, development planners gain gender disaggregated information on factors affecting development which guides them to more sustainable and effective development.

Gender-disaggregated information is different from information collected by other methods for development planning because it uses the *individual person* as its unit of analysis. Therefore, it is more precise than other methods employing more aggregate analytic units. Gender analysis is a methodology for presenting a comprehensive picture of women’s and men’s contributions to national development.

WID AND GAD: TRENDS IN PRACTICE

Traditional data collection methods often *omit* women’s multiple roles and contributions to development. The Women in Development (WID) approach to development planning highlights the importance of women’s contributions, focusing primarily on women. Other

development programs focus on the household or family as the **unit** of analysis, but they do not look at the individual rights, roles, and responsibilities of the individuals within the family. These approaches assume that each member of the family shares equally all the benefits accruing to the family as a whole. This assumption has proved to be incorrect.

Gender and Development (GAD) differs from these approaches by adding to WID to include **both women and men**. Development policies and plans are frequently based on the assumption that men alone support families, but in reality it is women and men together who do so; in the growing number of female-headed households it is women alone who do so.

Experience and research supports the assertion that the fundamental elements of effective development management—sustainability, productivity, and equitability—are strengthened through explicit attention to gender. A better understanding of gender as a variable in rural and urban livelihood systems can be gained by using a variety of analytical tools that fall loosely under the rubric of gender analysis.

THE PROBLEM: CHANGING GENDER ROLES AND TRANSFORMING ECONOMIES

Around the world, women's and men's responsibilities differ according to the specific situations in which they live. These circumstances are shaped by:

- environment
- economic conditions
- class
- culture
- national history
- household circumstances
- legal structures
- religion
- occupation

In much of the developing world resource productivity is declining. In order to survive in a cash economy under conditions of a declining resource base, men and women, even in the remotest parts of the world, increasingly seek local wage labor in both rural and urban areas. They are also planting and selling more cash crops, often at the expense of subsistence crops.

Global conditions cause the following phenomena in rural communities:

- extensive out-migration
- more time-intensive work for those left behind
- growing numbers of women-managed households
- new responsibilities for women without increased access to resources
- new norms and expectations as families become fragmented
- changes in gender and generational perspectives
- shifts from exchange work groups to wage labor

LINKAGES: GENDER AND POVERTY

Despite the accumulating forces for greater participation, large numbers of people continue to be excluded from the benefits of development: the poorest segments of society, people in rural areas, many religious and ethnic minorities and, in almost every country, women. Women are the world's largest excluded group. Even though they make up half the adult

population, and often contribute much more than their share to society, inside and outside the home, they are frequently excluded from positions of power. Many developing countries also exclude women from both political participation and productive work—whether by tradition, discriminatory laws, or withheld education. Indeed, for decades, life has changed very little for 500 million rural women in the developing world.

Powerful vested interests erect numerous obstacles to block off the routes to women's political and economic power. These obstacles include:

LEGAL SYSTEMS

Laws are often arbitrary and capricious and favor those with political influence or economic clout. In too many countries, legislation fails to measure up to ideals of transparency, accountability, fairness, and equality before the law. Some countries exclude the participation of women, for example, or of religious or ethnic minorities or deny certain rights to workers.

BUREAUCRATIC CONSTRAINTS

Many developing countries have shackled their people with innumerable regulations and controls, demanding all sorts of permits and permissions for even the most modest business initiative. Fortunately, many governments have started to dismantle the most stifling of these controls and are opening new avenues for entrepreneurial activity.

SOCIAL NORMS

Even when laws change, many old values and prejudices persist, and are often deeply embedded in everyday language and behavior. Laws may promote equality, but it is usually left to the discriminated group to struggle against prejudice. Thus, working women, even when they prove themselves better, are frequently not given equal treatment.

MALDISTRIBUTION OF ASSETS

In developing countries, one of the most significant assets is land. A high proportion of the people struggle to make a living in agriculture, but their efforts are often thwarted by the dominance of feudal elites who exert an overwhelming control over land. In these countries, there can never be true participation in the rural areas without far-reaching land reforms—as well as the extension services, trading, and credit for smaller farmers (particularly women) that can help them become productive and self-reliant.

Whether in urban or rural areas, vested interests that currently enjoy economic, financial, political, or social power are usually determined to defend their position—either individually or through close-knit associations, well-financed lobbies, and even violence.

Changing the power equation requires the organization of a countervailing force. People's organizations—be they farmers' cooperatives, residents' associations, consumer groups, or political parties—offer some of the most important sources of countervailing power. And they often exercise it most effectively through the sharing of information and ideas—it is ideas, not vested interests, that rule the world for good or evil.

TOOLS FOR GENDER ANALYSIS

Tools for gender analysis are essential building blocks for projects and programs aimed at improving lives in sustainable ways. They reveal how gender differences define people's rights, responsibilities, and opportunities in society. Recognizing the ways that development

affects men and women differently allows planners to incorporate this information in the successful implementation, monitoring, and evaluation of development projects and programs.

These tools offer ways of gathering data and analyzing gender as a variable in household and community organization for development. The methods give new insights into the local situation and permit a more comprehensive understanding of the community's situation, and facilitate the creation of a more effective equitable development program.

Through its GAD and Participatory Analysis for Community Action (PACA) training materials, the Peace Corps has introduced several gender analysis tools. For analyzing the macro-level, the Contextual Analysis format provides levels of considerations of both opportunities and constraints to women and men. The Gender Information Framework is a guide for culturally determined elements *within the household* that need analysis prior to project planning. The Participatory Analysis for Community Action materials provide a philosophy and methodologies for including the participants in the gender analysis and subsequent community action, with the development worker as partner.

Gender affects development and shapes opportunities for building local-level capacities across cultural, political, and ecological settings. Project experience shows that information about gender is vital to effective and sustainable outcomes. Interest in gender analysis has been spurred largely by those concerned about women's roles and their desire to transform gender relations across many dimensions of development. In reality, all people interested in effective and equitable development management and in long-term capacity-building for local communities must address issues of gender as it pertains to the development process.

For example, knowledge of differences in men's and women's savings strategies can indicate new ways to mobilize savings and thus establish stronger credit programs. Awareness of how men and women receive information (e.g., through newspapers, radio, at the health clinic) can assist in designing effective information dissemination systems. Knowing gender differences in mobility between and within towns can assist in designing primary and secondary school programs that increase both male and female enrollment. Knowledge of intra-household responsibility for seed selection for next year's planting provides an opportunity for agricultural researchers to gain greater understanding of the drought-resistant, early maturing, and disease-resistant characteristics of a particular plant variety.

APPLICATION OF GENDER ANALYSIS DATA

Development programmers can apply what they have learned at many project stages. As planners and implementers engage in important planning and implementation activities, the following guidance on project features will be useful.

PROJECT FEATURES TO CONSIDER

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

CHOICE OF PROMOTION STRATEGY

Promotion strategies need to take into account communication networks and language differences. Because of limited mobility and less education, women are less likely to speak a European or national language that must be learned in school. Women are therefore less able to take advantage of programs, education, and services. Language requirements need to be considered in outreach and training programs.

Women usually have different communication networks. While men may receive information from newspapers, radios, or at men-only village meetings, women may give and receive information at the clinic, the well, or alternate sources. To ensure that information about resources or new technology is adequately disseminated, it is important to identify gender-specific communication networks.

CHOICE OF TECHNICAL PACKAGES

Different technical approaches to development problems are frequently necessary to appropriately address the roles and responsibilities of men and women. Planners should ask: are technical packages applicable to all households (both male- and female-headed), or only those with certain types of resources? Are technical packages targeted for the person responsible for the activity, and do they match that person's resources? Are credit procedures appropriate for both men and women? Do education and training curricula address productivity issues related to both men's and women's activities?

TIMING AND DURATION OF ACTIVITIES

Women's home constraints differ from those of men because of their dual family and economic roles and responsibilities, which are often intertwined. Project activities, such as trading or voluntary labor contributions, need to take into account women's daily and seasonal time constraints. Training held during morning food preparation hours, for example, essentially precludes the participation of many women.

OUTREACH OF EXISTING DELIVERY SYSTEMS

Often women operate outside existing delivery systems. They frequently have less access to outreach or extension agents. There are a variety of explanations for this situation, ranging from cultural norms constraining contact between nonfamily males (extension agents), to lack of information appropriate to their needs provided by the delivery system.

LOCATION OF PROJECT ACTIVITIES OR SERVICES

Cultural norms often restrict the mobility of women. They are less likely to be able to travel to distant training sites, clinics, village meetings to discuss where water wells and schools should be placed, banks or financial services, and other meetings and services development projects often provide.

ELIGIBILITY CRITERIA

Eligibility criteria often preclude women's participation. English language requirements, for example, can reduce the eligible pool of women candidates for training, since fewer women have had access to educational institutions where English is taught. Age limits on long-term training programs may inadvertently restrict women's participation, since often they must remain at home with their children. Credit programs that require land as collateral essentially eliminate women's participation in many cultures. In some instances the criteria are more stringent than necessary and should be revised. For example, alternative forms of

collateral could be devised. Other options could provide the training and assistance that would enable women to meet the requirements.

NATURE AND DISTRIBUTION OF BENEFITS

Direct access to benefits affects incentives to participate. Where women are expected to work or participate but receive few benefits, which has occurred in agriculture and natural resource management projects, they are less likely to participate. Sometimes development interventions put additional burdens on women's daily tasks because those tasks are not identified in advance. Furthermore, unexpected tasks may limit other important activities and may not provide income that directly benefits the women and children.

CONCLUSION

Saying that the "people" or "community" will participate in a development project obscures the different activities, resources, and constraints of women and men. Gender roles are critical to any effort. These roles vary greatly by culture, and may change over time. Therefore, they must be examined in each specific context to avoid faulty generalizations or assumptions. "Standard" gender-sensitive project design is a contradiction. Every development context is unique and requires specific analysis to yield appropriate and adequate responses.

Excerpted from materials produced by the United States Agency for International Development's GENESYS Project; *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management* by Thomas-Slayter, Esser, and Shields, Clark University's International Development Program; and *Human Development Report 1993*, Oxford University Press.

GENDER AND DEVELOPMENT VOCABULARY AND DEFINITIONS

GENDER A sociocultural variable that refers to the *comparative, relational, or differential* roles, responsibilities, and activities of males and females. They are what a society or culture prescribes as proper roles, behaviors, personal identities, and relationships. Gender roles vary among societies, within societies, and over time; they are not bound to either men or women.

GENDER AND DEVELOPMENT (GAD) An approach to development that focuses on everyone: men and women, boys and girls. Gender is much more than an equity issue; gender roles, including access to resources, affect economic growth as well as social stability and well-being in a society.

GENDER ANALYSIS Gender analysis is not a specific method as much as it is a type of lens for focusing on particular aspects of cultural reality. In gender analysis, the effects of other variables are taken into account to provide a complete picture of the factors affecting people's participation in the economy and development efforts and the impact of these efforts on their lives. The analysis examines the roles and participation of women and men belonging to specific groups involved in a development activity.

GENDER ANALYSIS TOOLS Gender analysis is conducted through various types of tools, both quantitative and qualitative, such as analysis of sex-disaggregated data on national as well as regional and local levels, and contextual analysis including policies/laws, cultural norms, and community and household distribution of tasks, allocation of resources, and means of decision-making.

GENDER DIFFERENCES Differences in males' and females' roles in society usually operate in association with other socioeconomic variables. Neither all men nor all women necessarily share the same interests, concerns, or status. These vary by race, ethnicity, income, occupation, age, level of education, etc. Additionally, concerns and status of men and women differ *within* groups, whether racial, ethnic, age, or class.

GENDER-NEUTRAL Two *significantly* different uses of this term appear in development literature and even training materials:

- (1) Approaches to development that *assume* equal opportunities and benefits to both men and women without questioning whether a person's gender constrains or favors his/her access to resources and participation in decision-making are called gender-neutral.
- (2) Projects that have been analyzed and shown to show no gender bias may be termed gender-neutral.

SEX As an analytical category, sex distinguishes males and females exclusively by biological characteristics. For example, quantitative data are sex-disaggregated, because the whole universe consists of two sexes, men and women, who are mutually exclusive and exhaustive.

SEX-DISAGGREGATED DATA Information collected and reported by sex.

WOMEN IN DEVELOPMENT (WID) WID is a special effort to include women as participants in and beneficiaries of development because women, more often than men, have been left out of the development process. Sometimes it has focused on women's projects rather than being integrated into other development projects.

WORK How one fills one's time.

PRODUCTIVE Paid or wage labor, income-generating activities.

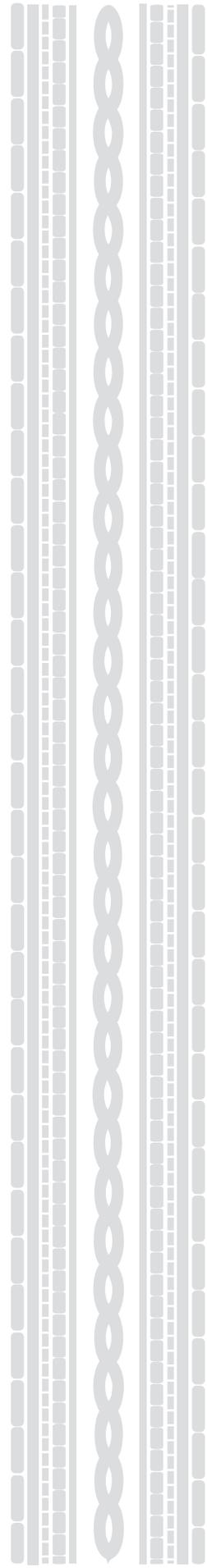
REPRODUCTIVE Domestic, child care; generally non-paid. Often includes subsistence farming and food preservation.

INTEGRATIVE Tasks with the function of holding society together and building morale in the community, such as tempering disappointments and grief and celebrating success and joy, or related to life stages: care for disabled and elderly, rituals and religious observances. It is generally unacknowledged as work.

STATUS ENHANCEMENT Activities usually seen as result of economic privilege: public volunteer work, entertaining, consumerism/shopping, social and cultural obligations.

NON-WORK Activities involving personal maintenance (sleeping, eating, exercise, physical grooming) and leisure activities of one's choice done for pleasure.

INVISIBLE WORK Non-paid work is considered invisible as it is not reflected in income statistics.



DEVELOPMENT APPROACHES

TRADITIONAL VIEW

Household

+

Resources

=

All in household benefit;
life improves

WITH GENDER ANALYSIS

M/W

+

M/W

=

Men & women benefit;
projects more effective

GENDER AND SEX

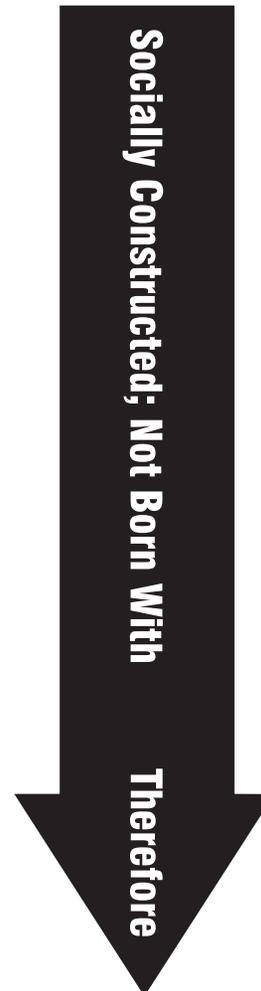
Sex



Cannot Be Changed

1. Only women can give birth.
2. Only men can supply sperm.

Gender



Changeable

1. Women can do traditionally male jobs as well as men.
2. Men can take care of children as well as women.

GENDER ≠ WOMEN

INTRODUCTION TO A SYSTEMS APPROACH

RATIONALE

This session introduces the concept of systems analysis as a point of reference for understanding the process of socio-economic change in households and local communities. It provides an integrative framework that places gender role differences within a broader context of development. The systems approach helps identify the nature of household decision-making, constraints on change to various aspects of the household, and strategies for project development.

TIME



2 - 2 1/2 hours

GOAL AND OBJECTIVES

GOAL

To understand individual and family behavior within a larger societal context.

OBJECTIVES

1. To identify the variation in rights, roles, and responsibilities within families.
2. To identify culturally determined aspects of the family system.
3. To consider how changes in one household activity will effect changes in other activities.
4. To analyze the potential issues in a project at various contextual levels outside of the household itself.
5. To introduce a gender analysis framework.

SESSION OUTLINE

- I. Introduction – includes case study/game (20 minutes)
- II. The Household as a System (45 minutes)
 - A. Components of the Household System (30 minutes)
 - B. Concepts of Work (15 minutes)
- III. The Household within a Larger System (15 minutes)
- IV. The Importance of Gender Analysis in Understanding the System (40 minutes)
- V. Gender Information Framework (GIF) Activity (20 minutes)
- VI. Summation (10 minutes)

TRAINER PREPARATION



1. Select from activities in the session, as needed; do each exercise and make individual notes, as needed.
2. Determine whether the rice project activity will be done as a game or an exercise. By adding the element of a game with competition, some trainers feel it stretches people to be more creative in their search for reasons the project had unexpected results. If you feel this trivializes the activity, leave out the game element.
3. Watch video.
4. Prepare flip charts and copy handouts.

MATERIALS



- Flip chart
- Markers
- Masking tape
- VCR and monitor
- Video: *Gender Analysis — Strengthening Winrock Projects*
- Prize for game (candy or ???)

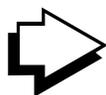
HANDOUTS

- Philippine Rice Project
- Household as a System
- The Concept of Work
- Contextual Analysis
- Gender Information Framework (outline or form)

FLIP CHART

- Gender Information Framework (outline)

PROCEDURE



I. INTRODUCTION (20 minutes)

- A. Introduce the session with a statement about the purpose: to consider the family as a system and review how gender roles vary among societies and within a community, and develop an awareness as to why gender analysis is important for project development.
- B. Begin with an activity. Divide the participants into small groups, each group with a piece of flip chart paper and a marker. Explain that each participant will receive a description of a Philippine rice project that had some unexpected results. Explain that participants are to brainstorm a list on the flip charts of all possible reasons for the results. They should be creative. They will have a 10 minute time limit. At the end of 10 minutes, the group with the most possibilities will win.

- C. Distribute the "Philippine Rice Project" handout and set the groups to work.
 - D. Call time. Ask for each list to be brought forward and posted. Have someone from each group report out on their discussion and read their list of reasons for the unexpected results. After the first report, subsequent groups can simply add any items not previously mentioned. Add up numbers of entries and award prize.
- Keep the flip charts posted and handy for referral during following sessions.

II. THE HOUSEHOLD AS A SYSTEM (45 minutes)

A. Components of the Household System (30 minutes)

- 1. Distribute "The Household as a System" handout. Discuss the diagram and emphasize the points made at the bottom of the diagram.

THE HOUSEHOLD AS A SYSTEM

All households have three components. All of the components are inter-related.

STRUCTURE
an organization with rights, roles,
responsibilities
(the "3 Rs")

RESOURCES
land
labor
capital
knowledge
time

NEEDS
consumption
income
health
education
etc.

Household Structures Are Culturally Determined:

1. Rights: belonging, ownership
2. Responsibilities: child care, production, education, health, interaction with outsiders, savings and investment
3. Roles for each family member: head of household, decision-maker, caregiver, etc.

These components are not independent of each other but are integrated in a functional sense. A change in one component can have an impact on activity somewhere else in the system.

Issues for discussions about development:

1. It is difficult to change culturally-determined roles.
2. Distribution of benefits cannot easily be changed from the outside.
3. Change at any point in the system will cause changes elsewhere, planned or unplanned.

2. What examples of household structure can be noted from the rice project case study that was discussed?

Possible responses:

STRUCTURE:

- Roles:**
- decision-making
 - planting, weeding
 - harvesting
 - post-harvest tasks
 - purchasing seed, fertilizer
 - selling rice
 - craft production and sales
 - other?

Rights: what is the relative distribution of rights to family resources, such as savings and income, livestock, land ownership?

Responsibilities: who is responsible for which rice production tasks, and who is responsible for providing funds for health, education, and other needs?

RESOURCES: who has access to and control over:

- Land:**
- land use
 - mechanisms of land access
 - quality of land

- Labor:**
- division of labor
 - seasonal availability
 - levels of skill
 - off-farm labor
 - subsistence and income-generating labor

- Knowledge:**
- access to technical assistance
 - language skills to attend training
 - literacy and numeracy
 - understanding of local environment
 - understanding of how family income is used

NEEDS: What is the impact on:

- time spent on each aspect of rice production
- other income generation for family
- family health and nutrition
- children's education

3. We have attempted to point out the need for more careful analysis of the household by considering how a project might impact one or more activities within the system. One of the areas we identified was the tasks or work that has to be done. Let's look more specifically at the concept of work.

B. Concepts of Work (15 minutes)

1. Distribute "The Concept of Work" handout. Go through the definitions. Relate the definitions back to the example used in the first part of the session.

THE CONCEPT OF WORK

PRODUCTIVE – To earn money

- Income-generating activities
- Paid or wage labor

REPRODUCTIVE – To maintain the home and family

- Housework (wash, clean, etc.)
- Caring for children
- Subsistence food production

INTEGRATIVE – To hold society together

- Care for elderly, people with disabilities
- Birth, marriage, funeral observances
- Other religious observances
- Local, regional, national celebrations

NON-WORK

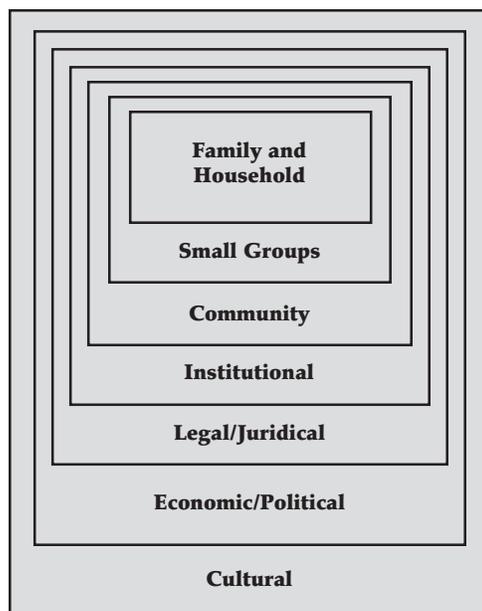
- Eating
- Sleeping
- Personal grooming
- Exercise
- Leisure activities of own choice

Note: Work that is not paid for is considered “invisible” and, as such, is not reflected in economic statistics. Historically, development projects focused only on productive work. These projects often interfere with important household functions and activities.

2. Apply these definitions to the rice project discussed previously. What type of work did the project address? What other types of work influenced the project’s outcome? How might some of the errors of this project have been avoided?

III. THE HOUSEHOLD WITHIN A LARGER SYSTEM (15 minutes)

- A. State that the household doesn’t function as a closed system. There are many influences on the household from outside the system. Another diagram provides some of these influences.
- B. Distribute the “Contextual Analysis” handout.



- C. Here we see the household at the center of many other concentric rings, each of which has an impact in different ways on the family. What are possible issues or factors that might have an impact on a family who is trying to increase income by more rice production?

Possible responses:

SMALL GROUPS:

- rice farmers — all chosen to get new rice or only some?
- “strong men”
- perhaps groups of women who have a craft cooperative
- rice farmers’ wives who may not now be able to make crafts to sell
- others?

COMMUNITY:

- population: women, children, youth, elderly, different ethnic groups (affected the same or differently by the project?)
- other farmers not included in this project
- How are community decisions made?
- What is the impact on water resources for everyone?
- Are there factions, feuds within the community?

INSTITUTIONAL: (NGO OR GOVERNMENT)

- Who provided the rice? at what cost? with what type of training, agreement for repayment?
- What is its relationship with community
- What are other institutional influences on the situation?

LEGAL/JURIDICAL:

- Any legal issues over land use?
- Who “owns” the land?

ECONOMIC/POLITICAL:

- Any political reasons this community was chosen to get this project?
- Is there a market for the extra rice? the infrastructure (roads, markets) for selling it?

- Are there higher costs for the seed? or need for additional products, such as fertilizer? cost? availability?

CULTURAL:

- Roles, rights, responsibilities
- Is rice, alone, the issue?
- Other events associated with income generation? use of income?
- Religious implications?

- D.** How can the information be obtained to better understand why a past project did not succeed, or whether a new one will? *The people who are involved, or potentially will be involved, in the development activities need to analyze their own systems, within their culture and contexts.*

The rice project failed its goal of increasing family income because the net gain from increased rice production did not make up for the loss of income from women's crafts made from the rice straw. Why? There was less straw from the new rice (look at the drawing) and less time to make crafts because more time was needed for post-harvest processing.

A more comprehensive analysis of the family system of the rice-farming family would have given the development agency important information. But, without considering the roles, responsibilities, and rights of both men and women, perhaps the impact of the project would not have been predicted. Let's add to our analysis, then, the gender component.

IV. THE IMPORTANCE OF GENDER ANALYSIS IN UNDERSTANDING THE SYSTEM

(40 minutes)

Introduction to video:

The video we are about to see describes how gender roles, rights, and responsibilities can vary, and how those variations might affect the impact of outside interventions.

Show the video *Gender Analysis—Strengthening Winrock Projects*.

The video has introduced the term "gender analysis." Let's now look at a framework for looking at gender data.

Either:

Use the "GIF Outline" on flip chart if doing the exercise below,

or

Distribute the "GIF Outline" handout, if not going to work with the tool.

The Gender Information Framework (GIF) is just that—a framework—to help us generate and analyze information. **It is not a survey form.** Many types of information listed on the GIF are quite personal. It would not be appropriate to ask individual questions about such information. As we learn about how a family functions, through observation, group discussions, participatory techniques, etc., we can begin to identify the more important information that the GIF produces. Review the aspects of the household that need analysis. (flip chart)

GENDER INFORMATION FRAMEWORK (OUTLINE)

Exploratory Factors

Task implementation
Income
Expenditures
Resources
Time/seasonability
Decision-making
Other factors

Analytic Factors

Constraints
Opportunities
Assumptions

V. GIF ACTIVITY [OPTIONAL] (20 minutes)

Distribute the blank “GIF Form” handout. Assign pairs or small groups to look at one section in I.A. (Exploratory Factors), assigning each group a different section. They are to list what they know about the family system of the rice farmers and the information that is needed to understand it.

After they have had about 10 minutes to work, go through the GIF categories, taking examples for each category from the groups that worked on them.

Finally, ask them, What questions did this raise for you?

VI. SUMMATION (10 minutes)

This session has introduced a systems approach and why it is important to development. We learned about the different components of the system and why an understanding of gender roles is crucial to project success. We have also identified who has the knowledge: the people themselves, not the outsiders. In future sessions, we will explore how this type of information can be gained and analyzed by the community itself, and what the role of the Volunteer (or other development workers) is in the process.

[Optional] Ask who can:

1. Describe how a household works as a system?
2. Give an example of a change in the household that will cause other changes? What might the resulting changes be?
3. Explain some of the contexts within which households function?
4. Give an example of a contextual factor in the project we looked at?
5. Explain what the GIF helps us do?

PHILIPPINE RICE

In a region of the Philippines where families are rice farmers on small land holdings, development workers looked for ways to increase family income. All family members had their own roles in rice production, harvest, and post-harvest. Additional income-earning schemes included the making and selling of straw baskets by women and children. Still there was not sufficient family income to permit all children to attend school and for adequate health care.

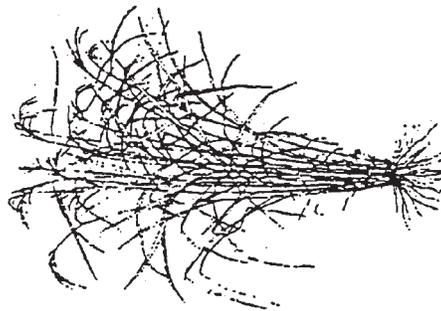
To increase family income, the intervention decided upon was to increase rice production through an improved high-yield strain, as it appeared to be the least disruptive to the rice culture already in existence and would not require more land. A new “modern rice” (see next page) was introduced and, over several years, it was accepted. By the end of five years, production had more than doubled. However, family income went down.

What happened? Using your creative thinking, generate as long a list of possible impacts on individuals, households, and the community of the introduction and successful production of modern rice as you can imagine.

SUPER RICE

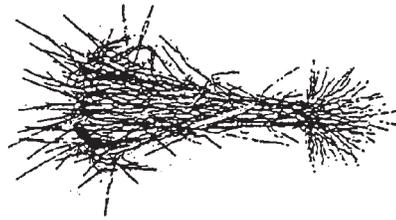
A new breed of "super rice" developed by agricultural researchers produces a high yield with less fertilizer than varieties currently being grown. Here is a comparison:

TALL CONVENTIONAL RICE



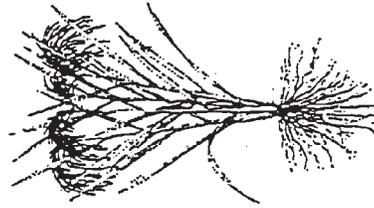
- Period in use: Before 1968
- Height: 43 - 70 inches
- Leaves: Thin, long
- Growth duration: 140 - 180 days
- Grain yield potential: 0.6 - 1.4 tons/acre

MODERN RICE



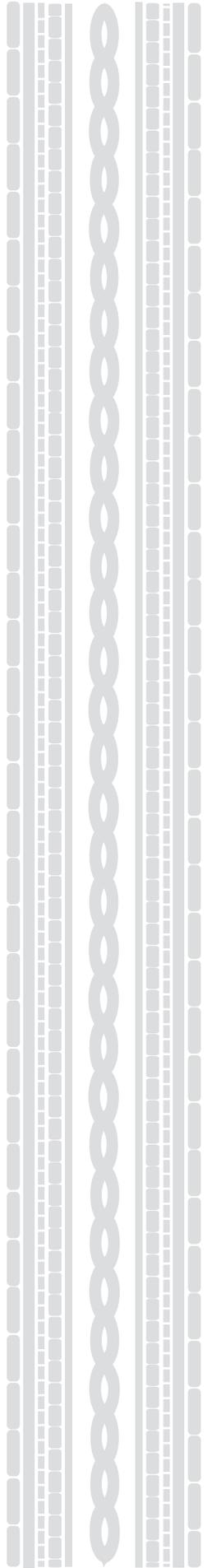
- Period in use: 1970s and 80s
- Height: 35 - 43 inches
- Leaves: Thin, short
- Growth duration: 110 - 140 days
- Grain yield potential: 2.4 - 4 tons/acre

SUPER RICE



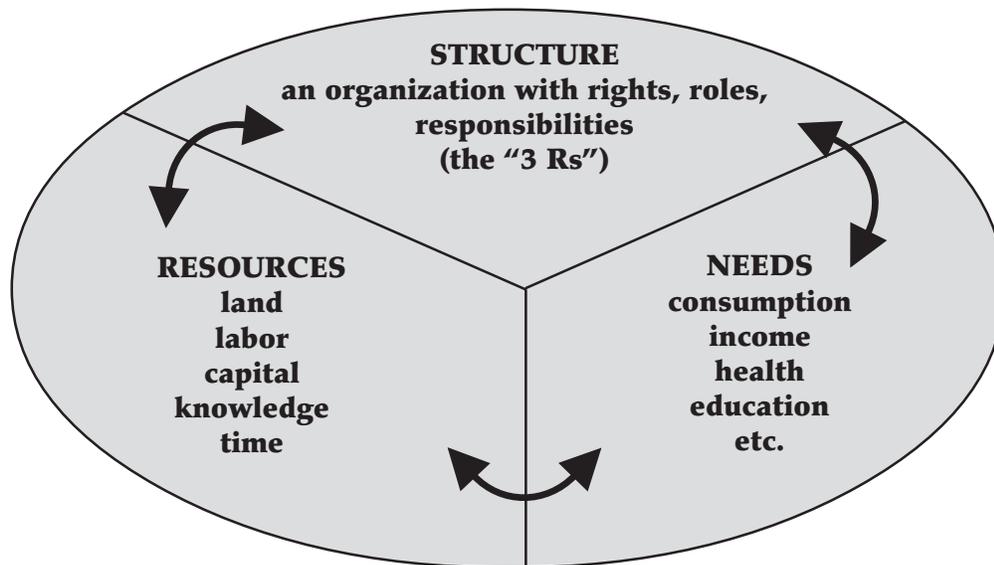
- Period in use: Introduction expected in 21st century
- Height: 35 - 43 inches
- Leaves: Thick, short
- Growth duration: 100 - 130 days
- Grain yield potential: 5.3 tons/acre

Source: International Rice Research Institute



THE HOUSEHOLD AS A SYSTEM

The household has three components. All of the components are inter-related.



Household Structures Are Culturally Determined:

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3. Roles for each family member: head of household, decision-maker, caregiver, etc.

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THE CONCEPT OF WORK

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INTEGRATIVE – To hold society together

- Care for elderly, people with disabilities
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- Other religious observances
- Local, regional, national celebrations

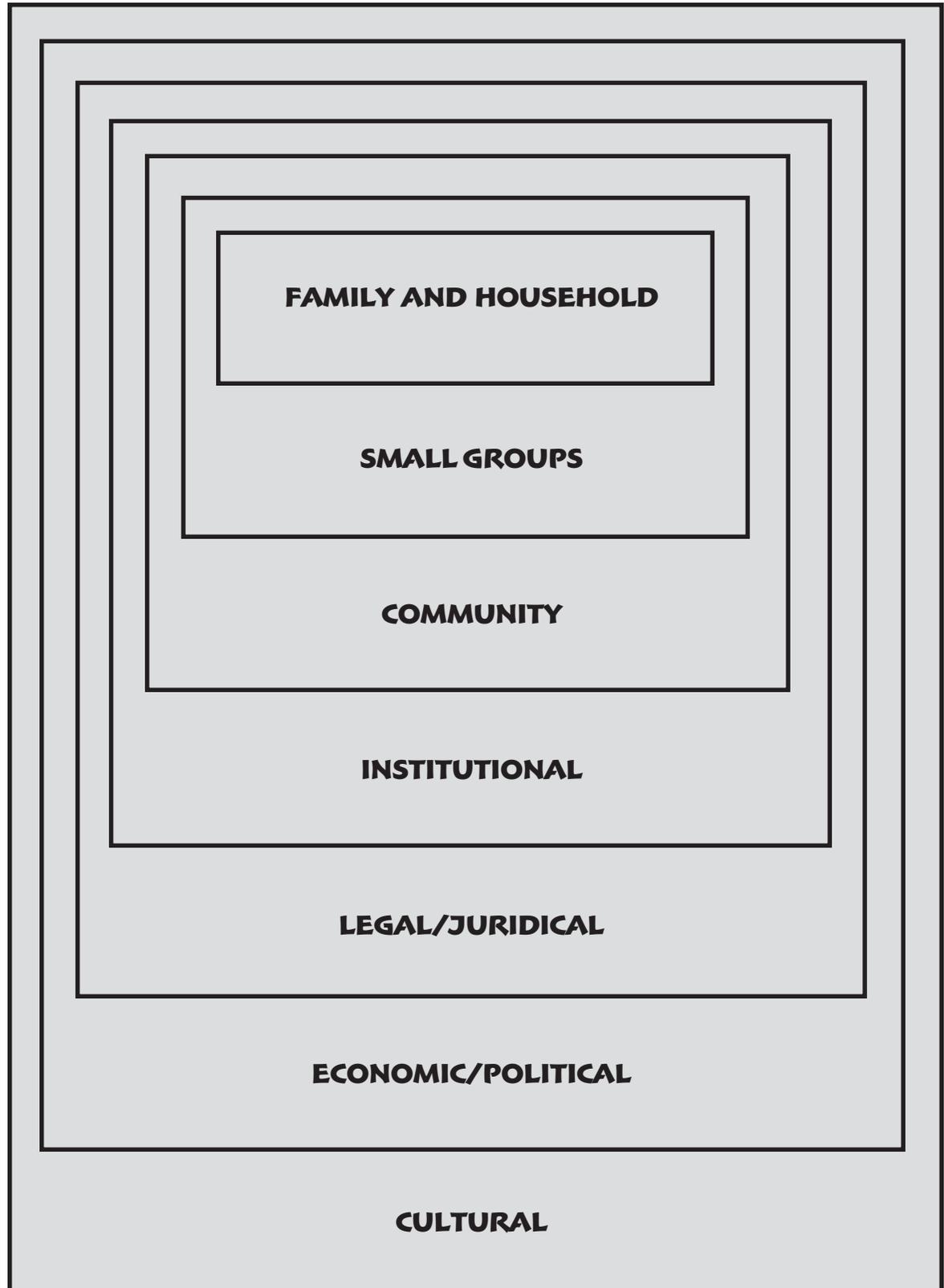
NON-WORK

- Eating
- Sleeping
- Personal grooming
- Exercise
- Leisure activities of own choice

Note: Work that is not paid for is considered “invisible” and, as such, is not reflected in economic statistics. Historically, development projects focused only on productive work. These projects often interfere with important household functions and activities.

Adapted from work by Mary Hill Rojas

CONTEXTUAL ANALYSIS



From USAID's GENESYS Project

GENDER INFORMATION FRAMEWORK (OUTLINE)

Exploratory Factors

Task implementation

Income

Expenditures

Resources

Time/seasonality

Decision-making

Other factors

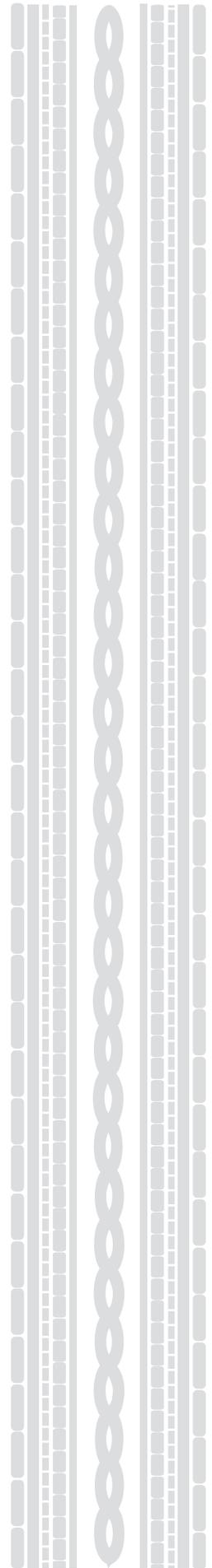
Analytic Factors

Constraints

Opportunities

Assumptions

Recommendations

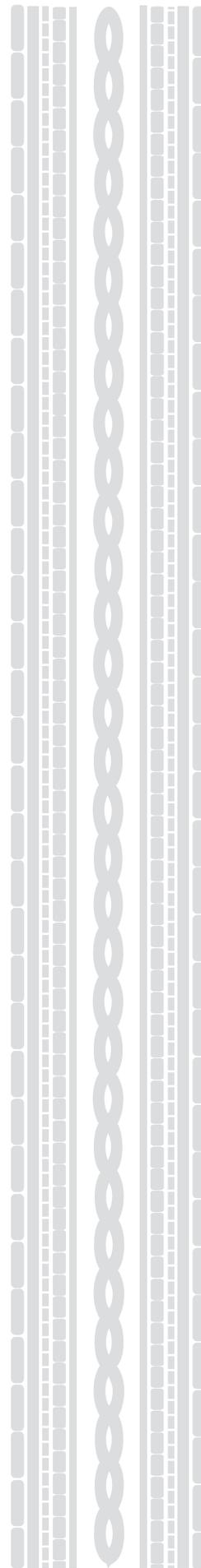


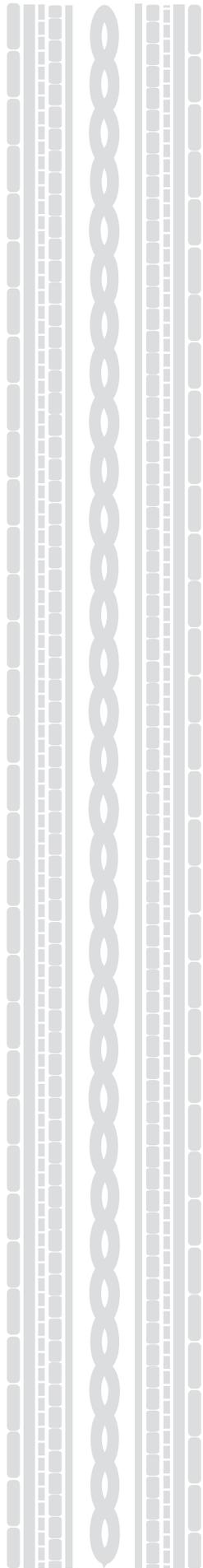
GENDER INFORMATION FRAMEWORK

I. EXPLORATORY FACTORS

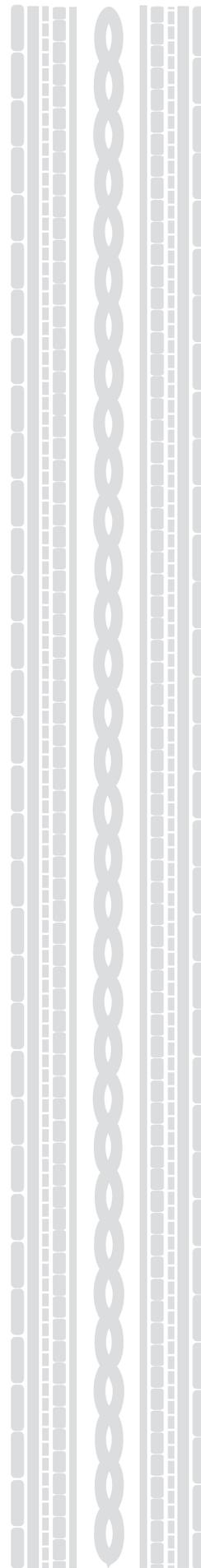
A. EXPLORATORY FACTORS 1. TASK IMPLEMENTATION (Who does what task? Include paid work, agriculture, other income-generating activities; food preparation and allocation; other household activities like cleaning, laundry, child care, tool-making/repair, sewing, schooling; out of home work, community work, "leisure" activities which produce products for the home or for sale.)	WOMEN and GIRLS	MEN and BOYS

<p>2. INCOME (Who earns what, in cash or kind? For example, through sale or exchange of products [raw or finished], family or individual enterprises, crafts, wage labor or work parties, any extra income-generating activities.)</p>	<p>WOMEN and GIRLS</p>	<p>MEN and BOYS</p>
<p>3. EXPENDITURES (Who contributes what toward household finances? For example, certain foods or basic goods, clothing, ceremonial costs, agriculture/business inputs, tools/equipment, education, medical fees, purchase of land/animals/materials/goods, savings, hired labor, etc.)</p>		





<p>4. RESOURCES</p> <p>(Who has access to and/or controls key resources? Include physical, such as land, buildings, labor, water, animals, vehicles, tools/equipment, raw materials, agriculture/business inputs; financial, such as capital, credit; informational, such as formal education/literacy, technical assistance, extension services, official languages, local agro-ecological-technical knowledge; socio-organizational, such as membership in dynamic, powerful, or legally recognized organizations, political connections/patrons, etc.)</p>	<p>WOMEN and GIRLS</p>	<p>MEN and BOYS</p>
<p>5. TIME/SEASONALITY</p> <p>(Of any of the following factors: labor availability [both household and non-household], access to markets/transport, income/expenditures, resource access/control, daily use of time/availability for other events, including training.)</p>		



	WOMEN and GIRLS	MEN and BOYS
<p>6. DECISION-MAKING (Who decides about behaviors or investments required? For example, can men and women make independent decisions about certain of the foregoing factors, or only men, or do they do so jointly? Or, must some decisions be made by entities larger than just the household, such as the community, elders, or local government?)</p>		
<p>7. OTHER (Any other gender-related factors you feel might be basic to any community action or project?)</p>		

B. ADDITIONAL DATA NEEDED

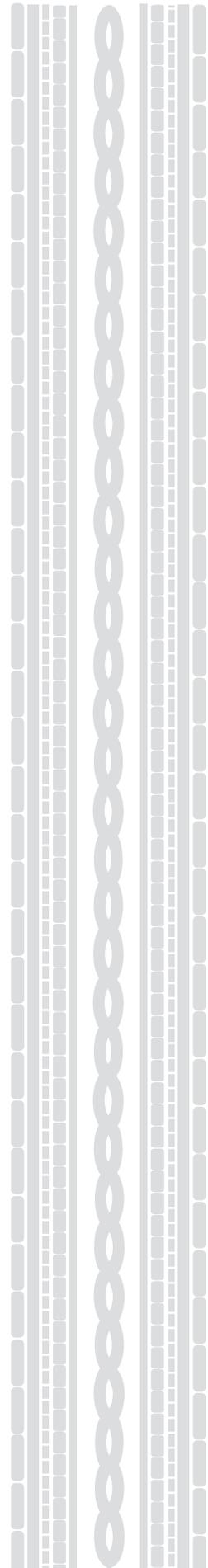
(These are “missing data” that are not known or available for completing some of the factors above but that are likely to be relevant to designing and implementing a project.)

**WOMEN and
GIRLS**

**MEN and
BOYS**

II. ANALYTIC FACTORS

<p>A. ANALYTICAL FACTORS</p> <p>1. CONSTRAINTS</p> <p>(In general or in relation to specific project objectives, such as on labor, time, on access to all the various kinds of resources, on decision-making; any cultural constraints; no clear incentives to change; project participation could jeopardize other current activities)</p>	<p>WOMEN and GIRLS</p>	<p>MEN and BOYS</p>
<p>2. OPPORTUNITIES</p> <p>(In general or in relation to specific project objectives, such as roles traditionally assigned to one or the other gender that facilitate project implementation; gender skills and knowledge that can be tapped; good fit of potential project with current cultural norms; clear incentives to project participants in terms of likely benefits)</p>		



B. ASSUMPTIONS

(Guesses you had to make in order to complete an analysis pending finding out the needed information)

**WOMEN and
GIRLS**

**MEN and
BOYS**

Based on Gender Information Framework developed by USAID's GENESYS Project

CONTEXTUAL ANALYSIS

RATIONALE

This session introduces gender analysis through the use of a broad-ranging tool, Contextual Analysis. This gender analysis tool focuses on the various levels of the socio-economic context in which development happens. Practice in analyzing the potential gender issues at the various levels is accomplished with a video.

TIME



1 hour 45 minutes

GOAL AND OBJECTIVES

GOAL

To introduce a tool which assists in the analysis of issues in the interwoven social and economic systems of a country.

OBJECTIVES

1. To identify gender issues in a particular situation (presented through a video).
2. To analyze one or more gender issue through the Contextual Analysis matrix.
3. To apply the learnings of this exercise to potential projects, situations.

SESSION OUTLINE

- I. Introduction (10-15 minutes)
- II. Video (30 minutes)
- III. Group work (45 minutes)
- IV. Summary (5 minutes)

TRAINER PREPARATION



1. Read the "Contextual Analysis of Gender and Social and Economic Issues" handout. Study the "Contextual Analysis Matrix."
2. View the video *Where Credit is Due* (or an alternate choice), noting gender issues and/or adding information to the notes on the video found in Booklet #1.

3. Practice using the Contextual Analysis tool by working across the matrix horizontally for one or two of the components.
4. Prepare some examples from your own experience.
5. Prepare the handouts.

MATERIALS



- VCR and monitor
- Video: *Where Credit is Due* or alternative, such as *Local Heroes, Global Change Part II: Against the Odds*
- Blank flip charts
- Marking pens
- Tape

FLIPCHARTS

- Contextual Analysis diagram
- Small group task
- Contextual Analysis Matrix

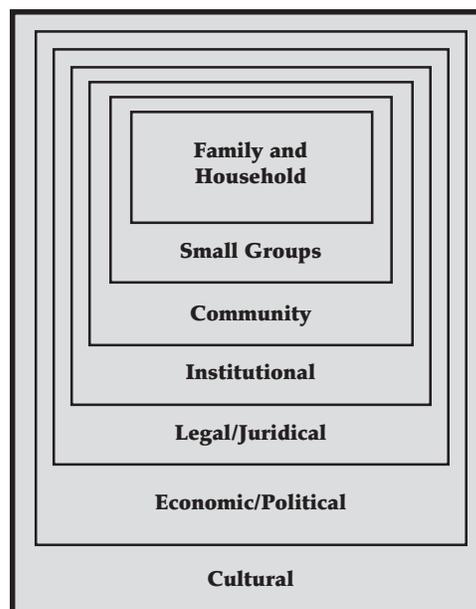
HANDOUTS

- “Contextual Analysis of Gender and Social and Economic Issues”
- Contextual Analysis Matrix (extra copy per person)

PROCEDURES

I. INTRODUCTION (10-15 minutes)

Introduce concept of gender analysis, if not done previously.



With use of a flip chart, introduce the concept of Contextual Analysis:

Contextual Analysis examines the social and economic components which make up the development context.

It suggests that constraints to and opportunities for ensuring men's and women's participation lie in an interwoven context of levels of social and economic systems.

An analysis of those constraints and opportunities for action must be conducted in that context, and at each level, in order to define feasible steps toward change.

Although Peace Corps development projects focus on the family, small group, and community, they operate in the context of the institutional, legal, political, and cultural levels. Constraints at other levels may block successful completion of a project at any other level.

Other agencies and non-governmental organizations (NGOs) with whom the Peace Corps cooperates may be working for change at other levels.

Examples:

In Bolivia, training for beekeeping interested both men and women. Both attended the training for awhile and then the women stopped coming. It was assumed they lost interest. However, on closer examination, it was realized that they stopped coming after the beekeeping protective clothing was introduced. The clothing included pants. Culturally, the women were unable or unwilling to wear pants instead of their traditional skirts. Once the issue was determined to be a cultural one, a solution could be found: they put the pants on and wore their skirts on top!

In Lithuania, women legally could get small business loans but they did not. It was discovered that even though they legally could get loans, they had to leave one-half of the amount of the loan in the bank as collateral while paying interest on the entire amount of the loan. This was a bureaucratic procedure, not a law.

II. VIDEO (30 minutes)

We will be exploring various contexts through the use of a video.

As you watch *Where Credit Is Due*, please take notes on gender issues you see or hear about. After the video, we will discuss them.

Show video.

Give participants a few minutes to complete their notes.

III. GROUP WORK (45 minutes)

Explain the small group work using the top half of the flip chart:

TASKS

1. **Discuss the gender issues each person noted and select one or two to analyze.**
2. **Use the Contextual Analysis Matrix to further investigate the issues you identified.**

Distribute a copy of the “Contextual Analysis Matrix” handout to each person. Together look at the categories across the top of the page:

ASSUMPTIONS: what assumptions are you making? what ones are being made by others?

CONSTRAINTS: what are the limitations at various levels of the social and economic system?

OPPORTUNITIES: where might opportunities be?

FURTHER INFORMATION: what other information would you need to investigate this issue further?

Have participants pull chairs together into groups of three. Remind them of the order of the tasks, as noted on the flip chart.

Monitor their progress. If they are still discussing issues in general after 30 minutes, ask them to pick one issue and work it through the matrix.

Stop the group work after 45 minutes.

Debrief, using some of the following questions:

1. What was valuable about this exercise?
2. What was difficult?
3. What issue did each group analyze?

Continue to work in your small groups for another 15 minutes on the last part of the task (reveal rest of flip chart):

4. Determine what might be one potential project Peace Corps could initiate to address some aspect of the situation they just saw?

5. In what contexts (e.g., legal, institutional, familial, cultural) would the problem need to be investigated prior to initiating such a project? Make a list.

In the full group, ask each small group what its potential project might be. If time, allow each to indicate one or more contexts they would need to investigate further.

IV. SUMMARY/TRANSITION (5 minutes)

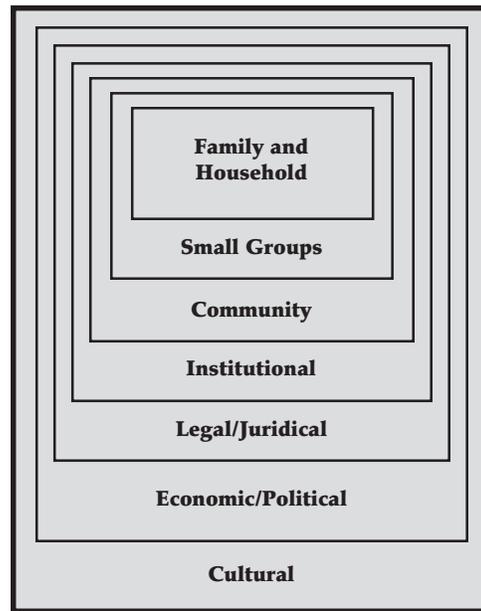
In what ways can this tool be applied? By whom?

Distribute the handout “Contextual Analysis of Gender and Social and Economic Issues.”

CONTEXTUAL ANALYSIS OF GENDER AND SOCIAL AND ECONOMIC ISSUES

This analysis examines the social and economic components which make up the development context; and is predicated on a history of observation suggesting that constraints to and opportunities for insuring men's and women's participation is an inter-woven context of levels of social and economic systems. An analysis of those constraints and opportunities for action must be conducted in that context, and at each level, in order to define feasible steps toward change. Although the Peace Corps' development projects focus on the family, small group, and community, they operate in the context of the institutional, legal, political, and cultural levels.

A development agency, like USAID, which operates at a macro level, might seek to make changes at the institutional, legal, political, and cultural levels, but, nevertheless, cannot ignore the community, small group, and household contexts.



This analysis, simple and straightforward in its application, subjects each of the levels of social and economic systems which are key for gender analysis—identified in the diagram above—to seven investigations, as follows:

- issues at each level which help us to clarify components of an equity problem related to gender, age, ethnicity, or race
- identify assumptions that exist about the problem
- test those assumptions
- specify change needed to achieve development objectives
- articulate specific constraints to change
- define opportunities for change
- develop specific steps for action

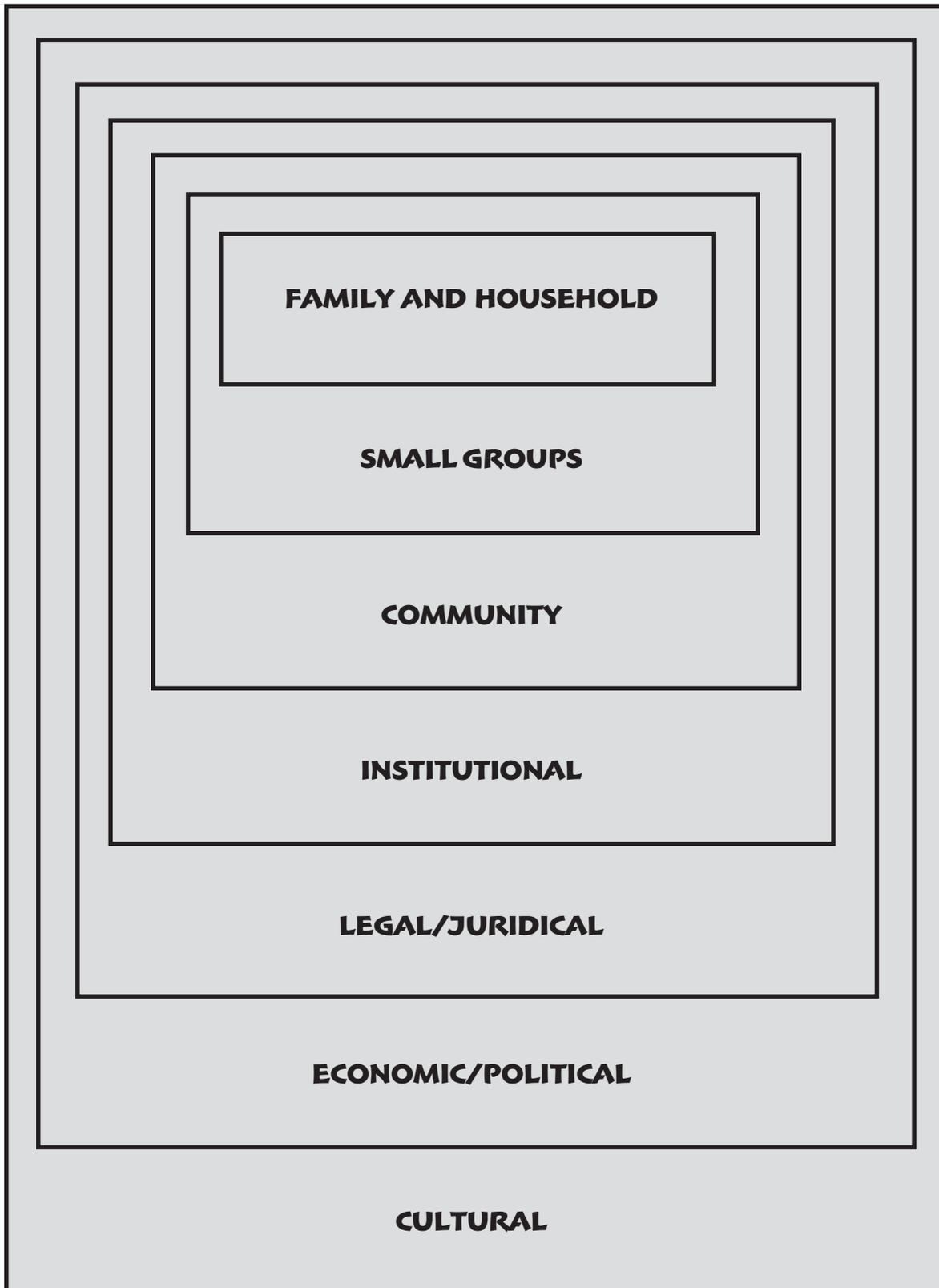
Component aspects to keep in mind as these investigations take place include:

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

* As is true with all components.

Adapted from materials produced by USAID's GENESYS Project

CONTEXTUAL ANALYSIS



Adapted from USAID's GENESYS Project materials

CONTEXTUAL ANALYSIS MATRIX

Gender Issues	Assumptions	Constraints (such as cultural, historical, economic, political, legal, institutional, community, familial)	Opportunities Opportunities	Information Needed

GENDER INFORMATION FRAMEWORK (GIF) WITH PROJECT WORK

RATIONALE

The Gender Information Framework (GIF) is a gender analysis tool which focuses on the household and the family system. This session introduces the GIF tool in combination with the Participatory Analysis for Community Action (PACA) tools of seasonal calendars and daily schedule to provide data for developing gender-sensitive project goals, objectives, and milestones.

TIME



2-3 hours

GOAL AND OBJECTIVES

GOAL

To explore culturally determined family systems and how that information is key to determining project designs that meet their stated goals.

OBJECTIVES

1. To explain the categories contained in the Gender Information Framework.
2. To identify several sources, not including individual interviews, that would provide information on family systems.
3. To write goals, objectives, and milestones that recognize gender differentiated roles and responsibilities.

SESSION OUTLINE

- I. Introduction (15 minutes)
- II. Case study (45 minutes)
- III. Application to a project (15-45 minutes)
- IV. Summary (15-30 minutes)

TRAINER PREPARATION



1. Read the background reading "Gender Information Framework" with the GIF form as reference. Add any examples of your own to the session plan where the GIF is introduced.

2. Read the case study and determine which of the regions are most appropriate to the participants. It is possible to use more than one, but that limits the effectiveness of the report out.
3. Select and copy the appropriate handouts based on your decision above.
4. Read the case study and complete the GIF so that you are prepared to answer questions.
5. Determine which of the options in the final step you will use to apply the GIF to a project.

MATERIALS



- Blank flip charts
- Marking pens
- Masking tape
- Table tents to identify regions, La Sierra, La Costa, La Selva (if using more than one region).

FLIP CHARTS

- Gender Information Framework (outline)
- Case study tasks

HANDOUTS

- Case Study: Tierralinda
 - Briefing Paper Prepared by Ministry of Planning
 - Notes on the Case
 - La Sierra (narrative, seasonal calendars, daily schedules)
 - La Costa (narrative, seasonal calendars, daily schedules)
 - La Selva (narrative, seasonal calendars, daily schedules)
 - Peace Corps/Tierralinda Assessment Report
 - Tierralinda Agricultural Development Project
- A Peace Corps Project – from country where training being done

Please note: The following handout starts on page 34 in the “Introduction to a Systems Approach” training session in this booklet.

- Gender Information Framework

PROCEDURE

I. INTRODUCTION (15 minutes)

Refer to the Contextual Analysis tool, introduced previously, which helps explore gender issues at all levels. This session will focus on a tool that can be used at the household level.

Introduce the GIF tool by describing its parts using a flip chart:

GENDER INFORMATION FRAMEWORK (OUTLINE)

Exploratory Factors

Task implementation

Income

Expenditures

Resources

Time/seasonality

Decision-making

Other factors

Analytic Factors

Constraints

Opportunities

Assumptions

Recommendations

- A.** Exploratory factors are the various aspects of the household:

TASK IMPLEMENTATION

Who does what tasks: household activities, agricultural production, natural resource management, family enterprise activity, extra income earning activities—both household tasks and tasks contributing to family income production.

This will frequently be the starting point of gender analysis: being aware of who does what in the situation the project will affect. This information is often the first step in identifying the target audience for a project; and it is important to ensure that resources are targeted to the right person(s) to achieve project objectives.

INCOME

Who earns what through agricultural production, family enterprise activity, and extra income earning activity? What are the primary sources of income for men and for women, and for boys and for girls, if any?

In most parts of the world, women have traditionally made significant contributions to family income—through cash earned, cash savings or self-provisioning, which also represent family income. Women’s economic contributions to the household have been under-acknowledged for several reasons. Often coming in small amounts, women’s income is often invisible.

EXPENDITURES

Who contributes what toward meeting family financial obligations? What expenditures are there? Do men and women have individual financial responsibilities?

Men and women have different expenditure patterns and financial responsibilities. In some parts of the world, men and women have very separate purses, with each responsible for different household expenses. This factor is important in the design of projects that will affect family income. It provides a broader perspective for decisions on a project’s or program’s target audience.

RESOURCES

Who has access to and who controls the resources needed to improve economic and social well-being. This look at “resources” includes land, labor, capital, information, education, technical assistance, and other elements that lead to enhanced economic and social well-being.

“Access to” and “control of” have very different meanings and implications. Access refers to being able to use something but not establishing parameters for its use; it can always be taken away. Control of means that there is decision-making power over usage.

For resources required by a project, how is access to and control of these resources different for men and for women? How does that affect ability to increase economic productivity or improve family well-being?

TIME/SEASONALITY

What are the daily activities and uses of time? How do they differ for men and for women? In what ways do daily activities change according to the seasons?

When are project beneficiaries most available to carry out new activities? What effects does the project have on other daily or seasonal activities and sources of income?

DECISION-MAKING

How are decisions made within the family? What are the different roles filled by men and women at different stages of decision-making? Who must be involved in the decision-making process to ensure that the particular decisions are implemented?

OTHER FACTORS

In addition to the factors above, what others might impact on a particular project? Decide on questions to ask to help determine whether there are or may be gender-related differences to each of these other factors.

B. Analytic factors: these are conclusion-drawing factors:

Constraints that affect men and women differently

Opportunities for either men or women in a specific area or sector

Assumptions that were made about the constraints and opportunities

C. Recommendations, depending upon reasons for analysis:

- Specific actions for project implementation
- Re-design or refinements to project

II. CASE STUDY (45 minutes)

Describe tasks of groups for next 40 minutes: (unveil first two steps of “Case Study Tasks” flipchart).

CASE STUDY TASKS

1. **Read case (introductory part and La Sierra), analyze data and enter it on GIF. Use (1) narratives and (2) results of two tools used in community: seasonal calendars, daily schedules.**
2. **Discuss and identify gender-related constraints, opportunities, and assumptions. Print on flip charts provided. Select reporter.**

Divide participants into small groups of five or six.

Distribute the case study handouts and the GIF form for agriculture/natural resources.

Remind of time five minutes before end. Ask them to post their flip charts around room. As groups, have them go to the other groups' charts and read and discuss any differences they found.

In the total group, discuss any questions that arose during the gallery above.

Trainer note: This would be an appropriate stopping point for a 15 minute break.

III. APPLICATION TO A PROJECT (15-45 minutes)

Option 1:

Use the handout from the case study that gives a Problem Statement and Agriculture Project purpose only. Assign the following final task to the original groups that analyzed the case study:

Use flip chart to unveil final task:

CASE STUDY TASKS (CONTINUED)

3. **Read project description and purpose.**
4. **Write one goal for the project which may have gender implications and requires sex disaggregated objectives to meet that goal. Write the objectives. Print on a flip chart.**
5. **For one objective, develop milestones which disaggregate data by sex. Print on flip chart.**

Post flip charts and either have each group report out or have participants circulate and read them.

Option 2:

Have country groups/APCDs and their counterparts/or some other grouping work in small groups using their own project to modify any goals/objectives/milestones that should address gender differences. They may need to make a list of questions for further analysis.

For reporting out, ask participants to discuss the process they went through as they worked on their project. What did they discuss? Why? If desired, ask groups to give one example of a modification they made, explaining why.

IV. SUMMARY (15-30 minutes)

Review the various sources of information used in this case study:

- Narrative
- Seasonal calendars
- Daily activities

Where did it come from? How much confidence can we have in it? How can we get insightful and valid information that forms the basis for project planning, monitoring, or evaluation.

Make a transition from using case study information to gathering information firsthand through participatory analysis—our focus from here on.

REFERENCES



1. *The Peace Corps Programming and Training System Manual (PATs)*, [ICE – T0054].
2. *Programming and Training for Peace Corps Women in Development Projects*, [ICE – T0084].

GENDER INFORMATION FRAMEWORK

The basic premise of the Gender and Development approach is that gender is an important variable in the development process. In other words, projects matching resources to the roles and responsibilities of men and women are more effective than are projects that do not. Therefore, to ensure more positive project outcomes, development planners and field workers need to identify key differences in female and male roles and responsibilities, analyze the implications of these differences for programming, and incorporate that information into development activities.

Analysis of gender as a variable is useful at all stages of programming, beginning with the formation of a country programming strategy. At the project development or adaptation level, more detailed knowledge of gender differences is needed to guide effective targeting of resources. For development workers, an understanding of how gender may affect projects or interventions at the household level provides the awareness needed to begin to work with their communities to define their assets and needs.

THE GENDER INFORMATION FRAMEWORK

Gender analysis tools and techniques are used to identify the roles and responsibilities of men and women which affect the design and implementation of development programs. In exploring the culturally determined family systems, more indirect methods are preferable to individual interviews because of the personal nature of some of the data. Observation is one method. Focus groups where men and women participate in group activities such as developing sample daily schedules, community maps, and seasonal calendars by gender group are extremely rich. Many details about roles and responsibilities, resources and needs, are explored and discussed in a non-threatening atmosphere, and the community members themselves are involved in analyzing the meaning of the data.

The Gender Information Framework is a tool for entering and analyzing data. **It is not a questionnaire** and should not be used as such. The process of gender analysis involves exploring six factors in the context of the situation the project wants to affect. Analysis of these factors leads to conclusions about gender differentiated constraints to participation in, contribution to, and benefits from intended development activities. It also helps identify opportunities that gender-based roles and responsibilities provide for improving project design. These factors are not mutually exclusive (on occasion they will overlap), and not all will have relevance. In fact, some will be significant for only specific kinds of projects. However, it is important that each be assessed for its relevance to the project under consideration.

It should also be noted that although gender analysis should be carried out for all levels of programming, most of the examples used in the following factor descriptions will focus on household level projects, where gender issues are often most easily identified.

STEP ONE: EXPLORATORY FACTORS

The six exploratory factors help to identify where gender intervenes in the social and economic production systems to be affected by development activities.

1. TASK IMPLEMENTATION

Key issues:

Who does what in household activities, agricultural production, natural resource management, family enterprise activity, extra income earning activities; looks at both household tasks and tasks contributing to family income production.

This frequently will be the starting point of gender analysis: being aware of who does what in the situation the project will affect. This information is often the first step in identifying the target audience for a project, and it is important to ensure that resources are targeted to the right person(s) to achieve project objectives.

Question:

For projects that affect daily household activities, who is responsible for these activities?

Women have household and family responsibilities which usually include fuel and water collection, building maintenance, food preparation, child care, and family health and education. Information on these activities needs to be considered, because new activities for women in the form of “projects” often increase an already overburdened work day.

For agricultural and natural resource management projects, planners will want to know the male and female division of labor among and within specific crops, livestock, or natural resources. In crops, for example, who is responsible for rice, maize, vegetable production? Who plows, plants, weeds, fertilizes, stores, and processes? Who uses the crops and for what purpose?

This information will be followed, through the analysis, to assess who controls the use of the crop, clarifying the relationship between responsibility and benefits.

EXAMPLE

NORTHEAST THAILAND RAINFED AGRICULTURE DEVELOPMENT

The objective of this project was to increase rice production by the introduction of power tillers and the use of a nitrogen-fixing crop. Individual farms were to carry out their own trials of new technologies. Men were assumed to be principal farmers and were trained to carry out crop trials. However, men had outside income sources and were frequently away from the farm. Women were not informed about the research, even those whose husbands were present. The project experienced problems: power tillers were not used and the nitrogen-fixing crop was not planted. Also, some women, whose work would increase because of the new trials, pressured their husbands to drop out.

For enterprise development activities, is family labor included in enterprise accounts? How do family members contribute labor? Who is responsible for bookkeeping; for cleaning and repairs; for product finishing and packaging; for product sales?

2. INCOME

Key issue:

Who earns what through agricultural production, family enterprise activity, extra income earning activities, and health and education projects counting on user fees?

Questions:

What are the primary sources of income for men and women?

In most parts of the world, women have traditionally made significant contributions to family income—through cash earned, cash savings, or self-provisioning, which also represent family income. Women’s economic contributions to the household have been under acknowledged for several reasons. Often coming in small amounts, women’s income has sometimes been invisible.

In Peru, for example, early national census surveys identified 25-30 per cent of women as economically active. More recent surveys showed a sharp decline—down to six percent—which seemed unlikely in the face of Peru’s recession, inflation, and the need for more cash income. On reflection, researchers reviewed the census questionnaires. In earlier surveys, women had been asked the question, “What did you do last week, last month, six months ago?,” to identify their occupation. In more recent census surveys, women were asked the question, “What is your occupation?” Because of cultural norms which give higher status to households where women do not work outside the home, women listed their occupation as “housewife,” despite employment in food processing, crafts, or other sectors.

Another reason cited for not taking women’s income into account is that women are constrained, often by culture, in their ability to respond to economic incentives. It is sometimes suggested that efforts to increase men’s income can be more cost effective. However, even women with very strict cultural constraints may provide income to the family.

EXAMPLE

MARKETING BY NIGERIAN WOMEN IN SECLUSION

It is commonly assumed that Muslim Hausa women in Nigeria, many of whom live in total seclusion, do not earn income. In fact, many women manage grain distribution and sales networks from their homes using children and male relatives. It is they who plan sales, design and manage marketing strategies, and keep records.

Women are also said to be less productive than men, though few studies have examined the relative productivity rates of men and women. The most frequently cited study in this area was carried out by Moock in Kenya. He noted that when men’s educational, technological, credit, informational and other advantages were factored out, women farm managers were at least as productive as men and perhaps more so, having yields as high or higher than men with similar levels of education and access or use of inputs. Results of a more recent study follow.

EXAMPLE**ROAD CONSTRUCTION AND MARKETING
IN CAMEROON**

In Southern Cameroon, a road was built that connected a rural village to a larger one with a bigger market where higher prices for fruits and vegetables could be obtained. When road usage was evaluated, it was discovered that both men and women had increased usage (and increased vegetable production). However, more women—already working 60 hours per week—than men added another several hours to their work week, to carry their vegetables to the more distant market to get higher prices offered there.

Because of the growing number of female-headed households, the rapid monetization of national economies that require more cash for survival, and the increasing dependence on women's income to survive economic adjustment programs, women's income is increasingly acknowledged.

Therefore projects, programs, and policies designed to raise incomes need to assess gender differences in ability to participate in project activities and to receive benefits. Awareness of gender considerations in such activities is also needed to avoid adverse impacts on female-headed households. Consideration of this factor is especially important in private sector development projects, as well as in agricultural projects.

Do income sources vary during the year?

Women's and men's incomes are not only derived from different sources, but in many cultures women's are more diverse and are earned varyingly throughout the year. Women typically obtain income from handicrafts, processed food, sale of surplus vegetables/grains, seasonal wage labor—the production of which takes place at different times of the year.

Women's earnings are often the only available income during the "hungry" season before harvest, and because this income is not tied to one source (one cash crop or a full-time job), it often saves the family in times of drought or recession. Men's income, in contrast, is typically derived from wage labor, employment, export crop agriculture, livestock, or other more formal sector sources.

More and more women are entering the formal labor market, especially in export processing zones where they work in fruit and vegetable packing and processing plants, textile factories, and pharmaceutical firms. However, this kind of employment is still considerably less frequent for women than men.

Knowledge of men's and women's income sources, and how such income is obtained over seasons, is important for planning both macro and micro level strategies to increase incomes. Such knowledge is also important to avoid unintended adverse effects on a family member's income.

What inputs are used to earn income?

Input in this sense is not restricted to agricultural inputs such as fertilizer and pesticides. It also includes credit, technical assistance, and other contributions to earned income.

Women and men generally have different levels of input usage, with women using far less. For example, women and men generally have different levels of credit. Women's credit is typically in small amounts and obtained through informal networks. In agriculture, women typically use few purchased fertilizers. In all economic endeavors, women usually have less access to technical assistance. Because of this, in part, women's productivity appears to be less than men's.

Agricultural subsidies can have significantly different effects by gender. Subsidies, which are often provided to promote export crop production, can lead to a decline in food crop production. Women represent a high proportion of food crop producers. Surpluses are sold, providing a significant source of income for them and their family, albeit in small doses throughout the year.

Policies that promote export crops such as cotton and coffee by providing subsidies on fertilizers or seeds, extension assistance, or other incentives may result in male household heads taking away the wife's food producing fields for use in export crop production. This can increase her labor requirements on his fields while decreasing her production. Ultimately, the woman's income derived from surplus sales of her crops is decreased. Subsidies, then, need to be planned with an understanding of potential impact on all family members' income, both cash and in the form of food for consumption. Agricultural research has similar gender considerations.

3. EXPENDITURES

Key issue:

Who contributes what toward meeting family financial obligations? Look particularly at projects (e.g., agricultural-projects, contract growing schemes, natural resource management projects, projects that charge fees for services) that directly or indirectly change division of labor and access to resources.

Questions:

Do men and women have individual financial responsibilities? Who pays for what?

Women and men have different expenditure patterns and financial responsibilities. In some parts of the world, men and women have very separate purses, with each responsible for specific household expenses. This factor is important in the design of projects that will affect family income. It provides a broader perspective for decisions on a project's target audience.

Knowledge of family expenditure patterns will be very helpful in checking assumptions that increasing one family member's income, sometimes at the expense of another member, will benefit the family overall.

A common division of financial responsibilities is that men are responsible for house building and repairs, livestock, land purchases; while women provide food (home grown or purchased), pay school and medical fees, i.e., most of the day-to-day expenses. However, this varies widely among and within different cultures.

Research indicates that around the world women contribute a larger proportion of their income to household expenses than do men. Women typically contribute 95 per cent of their income to family expenses, while men's contribution ranges from 45 to 75 per cent of their income.

EXAMPLE

CONTRIBUTION TO HOUSEHOLD INCOME IN SOUTH INDIA

In a study of very poor agriculture households in South India, wives earned a median income that was 55 per cent of their mates'. However, they contributed an average of 93 per cent of this income to family expenses. Their mates contributed 60 per cent of their income to family expenses. This meant that the women contributed 84 per cent of their families' expenses.

How do changes in family member incomes affect ability to meet family financial obligations?

Increases in women's income have been closely correlated with increases in family well-being, as measured by nutritional and educational status of children in some countries.

EXAMPLE

WOMEN'S GARDENS AND CHILD NUTRITION IN INDIA

Another study in South India found that mothers with gardens or income had better nourished children than those who did not. The single largest contributor to the child's nutrition was the presence of a home garden and produce distributed by the mother. There was no positive increase in child nutrition as paternal income rose, but increasing maternal income did benefit child nutrition. Data indicated that resources under the mother's control were the most important factor in the level of child nutrition.

EXAMPLE

MALE AND FEMALE WAGE INCREASES AND CHILD NUTRITION IN THE PHILIPPINES

A longitudinal study of 800 rural Filipino households discovered that as the wife's estimated wage rate rose, both she and her children did relatively better in terms of intra-household allocation of calories; the male household head typically had the largest allocation of calories in the household. An inverse relationship was found between increases in the estimated wage of a male household head and child nutrition.

Another important aspect in gender differences is savings patterns, another form of expenditures. Women as a rule do not deposit their savings in formal sector institutions, for reasons ranging from lack of literacy, to deposit and withdrawal conditions, to minimum deposit requirements. Instead, women tend to rely on savings associations such as tontines, burial societies, and other forms of savings clubs, the objectives of which are very specific. Projects which look to mobilize savings (described as considerable) of either rural or urban people need to look at the savings motivation and mechanism of the men and women savers before making investment potential projections.

4. RESOURCES

Key issue:

Who has access to and who controls the resources needed to improve economic and social well-being? This look at “resources” includes land, labor, capital, information, education, technical assistance, and other elements that lead to enhanced economic and social well-being.

“Access to” and “Control of” resources have very different meanings and implications. Access refers to being able to use something but not establishing parameters for its use; it can always be taken away. The difference is in the decision-making power over usage.

Questions:

For resources required by a project, how is access to and control of these resources different for men and women? How does that affect ability to increase economic productivity or improve family well-being?

Women and men often have different access to resources. This differential access affects their ability to participate in and benefit from projects in a way that reflects their roles and responsibilities. In many parts of the world, women do not control their own labor or income; they are often unable to obtain credit without their husband’s or another male family member’s signature. In some countries, women are required to have their husband’s permission to obtain contraception. Lack of access to information, credit, and other resources has limited women’s contribution to economic development on a broad scale and has affected project success.

EXAMPLE

ACCESS TO AND CONTROL OF PROJECT RESOURCES IN GUATEMALA

In Guatemala, three villages were involved in a vegetable contract growing scheme. In two villages, women were expected to take time away from their own income-generating and family activities to work on crops their husbands had contracted to produce. In one village the cooperative coordinating the project paid “household heads” for all family labor. Women received little of the proceeds of their work, and yields were much lower than where women were paid directly.

Women often have less access to education and one of the results is they are less likely to know the national European languages or other languages spoken in the country. Therefore, extension agents, credit program promotions, and other development-related activities are less accessible to women. Men and women often have different channels for receiving information.

As noted earlier, access to land is often controlled by male household heads. Despite their responsibility for providing food to the family, women may be allocated fields that are far away and less fertile.

EXAMPLE

FARMING SYSTEMS PROJECT IN RWANDA

In a Farming Systems project in Rwanda, an agronomist working with farmers was encouraged to tag soil samples to identify male and female fields. The agronomist thought this was unnecessary, but finally agreed to do so. The agronomist was surprised to discover that the women's fields were less fertile, requiring different fertilizer recommendations from those for their male counterparts.

5. TIME/SEASONALITY

Key issue:

How does the division of labor change throughout the year (seasonality)?

Questions:

When are the project beneficiaries or partners the most available to carry out new activities?

Where male and female labor contributions for their own or community benefit are incorporated into project design, knowledge of seasonal labor patterns by gender can be critical. This information will be especially important for agricultural and natural resource management projects.

Does availability to perform labor, make purchases, use new resources change over the seasons?

EXAMPLE

AGRI-BUSINESS IN BOLIVIA

In a project to develop a citrus canning factory in Latin America, planners discovered too late that women, on whose labor they were counting for factory jobs, worked in citrus groves harvesting at the same time their labor was needed for processing. They were unable to work in the canning factory, and the factory was unable to start on time because of a labor shortage.

How are project activities affected by the availability of family members fulfilling current domestic responsibilities?

EXAMPLE

SOIL CONSERVATION IN KENYA

This project to build soil terraces to prevent soil erosion relied on women's voluntary labor for terrace construction. Original project scheduling did not take into account women's seasonal agricultural labor requirements; it scheduled soil terrace construction for the traditional harvest time. The resulting labor bottleneck prevented utilization of women's labor. The project came to a standstill until it was redesigned to take into account labor availability. Women's labor contribution to the project, after the redesign, was valued at over \$2 million.

6. DECISION-MAKING

Key issue:

What changes in decision-making behavior are required for project success?

Questions:

How are decisions made at relevant levels of society (e.g., in the family, in the community, at the local and national governments)?

What are the different roles filled by men and women at different stages in decision-making?

Who must be involved in the decision-making process to ensure that the particular decisions are implemented?

7. OTHER FACTORS

What other factors, in addition to labor, income, expenditure patterns, resources, seasonality and decision-making, are basic to an analysis of YOUR situation?

Decide what questions should be answered in order to help determine whether there are or may be gender-related differences to each of these other factors.

STEP TWO: ANALYSIS

Gender analysis provides the basis for conclusions about constraints to and opportunities for programming that result from gender differences.

1. CONSTRAINTS

Key issue:

How are the constraints to participation in or benefits from a particular project or program different for women than for men?

Based on the exploratory factor analysis of gender differences, programmers can draw conclusions about gender-specific constraints relevant to a specific project or program.

Questions:

For the unit of analysis and the project under consideration, what are the key differences between men's and women's constraints (e.g. labor, time, access to credit, education, training, other)?

For example, in some efforts to provide credit for small businesses, it has been determined from the assessment of sources of income that both males and females are involved in small-scale manufacturing or trading. Project designers should, in these cases, review gender-specific constraints to starting small businesses, such as collateral requirements or lending procedures.

How do constraints affect women's or men's ability to contribute to or benefit from a program? What are the implications for incentives to participate?

In an attempt to increase food production by increasing land under cultivation, planners would first identify the target audience for a program by identifying who does what in the situation. If the primary food producers are female, project designers would then identify constraints specific to women such as land ownership, and access to and control of labor. This would enable planners to design strategies to address those specific constraints.

2. OPPORTUNITIES

Key issue:

What opportunities for enhancing development programs are provided by gender-specific roles and responsibilities?

Information from the exploratory factor analysis and the identification of constraints is synthesized and then used in formulating recommendations for program or project design or adaptation. This process is carried out in the context of setting project goals and purpose.

Question:

For the unit of analysis and the project under consideration, what are the opportunities for increasing project effectiveness by recognizing and building on differences in gender roles, responsibilities, skills, and knowledge?

Gender analysis can reveal information that increases opportunities for more effective project planning. For example, knowledge of differences in men's and women's savings strategies can indicate new ways to mobilize savings and thus establish stronger credit programs. Awareness of how men and women receive information (e.g., through newspapers, radio, at the health clinic) can assist in designing effective information dissemination systems. Knowing differences in constraints to mobility between and within towns can assist in designing primary school programs that increase both male and female enrollment.

Adapted from USAID's GENEYS Project materials

GENDER ANALYSIS, AGRICULTURE AND PEACE CORPS/TIERRALINDA - A CASE STUDY

NOTES ON THE CASE STUDY

This case study is designed to illustrate some key issues that relate to gender analysis, as well as demonstrate some of the practical manifestations of this process. It is intended to be used in a training exercise for enhancing attention to the implications of gender in development programs. It requires participants to put themselves in someone else's shoes, listen to others, come to grips with the constraints of the "real" circumstances described, and make decisions about feasible recommendations. The case study will encourage participants to work with and test gender analysis ideas and the relationship of those ideas to practice.

The participant's role is that of a project design consultant to Peace Corps/Tierralinda working to make practical gender sensitive recommendations for an agricultural development project. The recommendations must deal with the political, social, cultural, and resource realities of the country itself.

Adapted from USAID case study "Gender Analysis and Runapacha" by Betsy Davis, Weyman Fussell, George Rowland, and Judee Blohm. Peace Corps/Washington, 1994. Draws on Hirschman, and Garrett & Waters 1990.

TIERRALINDA BRIEFING PAPER

(PREPARED BY THE MINISTRY OF PLANNING)

Tierralinda lies between the equator and the Tropic of Capricorn, with marked variation in topography, altitude, climate, and rainfall. It is a country rich in natural resources. There are three major ecological areas: La Costa, the western lowland; La Sierra, the mountainous highlands; and La Selva, the eastern jungle. Traditionally, there has been a reliance on the export of agricultural products—most notably bananas, coffee and cocoa—for foreign exchange. The majority of farmers work at a subsistence level. Agriculture output has grown at an average annual rate of two percent during the last ten years, reflecting increased agricultural yields and expansion on to new land. The current government encourages improvements in the rate of private investment in both industry and agrochemical-based agriculture, intra-regional trade, export diversification, agricultural credit for small farmers, and the sustainable use of Tierralinda's natural resources.

Tierralinda has a culturally diverse population—55 percent mestizo, 25 percent indigenous, 10 percent Spanish, and 10 percent black. Many of the indigenous people of the Selva and the Sierra speak Spanish as a second language, if any Spanish at all. Many of the indigenous groups have been in conflict with the government to contest their land rights under current legislation. These groups are reacting in part to increased migration to the Amazonian area, which has brought settlers onto traditional indigenous land holdings. The government is in continuing negotiations with these groups in an effort to reach agreement on the land rights issue.

The population growth rate has dropped to just under three percent nationally and child mortality rates are low, but child illness rates remain high. Access to health care has improved; however, approximately one-third of the population has severely limited access or none at all. The population is rapidly urbanizing, with no indication that the current pattern of internal migration will slow. There remains a large gap between access to services in urban versus rural areas. The urbanization process has increased the demand for food (maize and potatoes), encouraging higher productivity among farmers. The literacy rate has risen from 68 percent in 1960 to nearly 90 percent in 1990, with 70 percent of all women literate compared to 90 percent of men. Primary school enrollment rates were nearly 100 percent in 1980; secondary school enrollment rates reached 53 percent in 1983. Primary school completion rates for rural areas, however, are one-third lower than in urban areas.

PEACE CORPS/TIERRALINDA ASSESSMENT REPORT

This paper describes the Peace Corps/Tierralinda Project Assessment Team's findings and conclusions on some of the gender issues that will affect the implementation and impact of the proposed project.

A. GENERAL INFORMATION

In Tierralinda, rural women tend to marry early and begin child bearing while they are young. Frequent and closely spaced births, combined with women's generally poor nutritional status and limited access to health care, contribute to jeopardizing women's health. Childbearing practices also place youngsters at risk for low birth weight, developmental delay, and repeated illnesses, all of which constitute additional burdens for mothers.

With or without a male partner, women are generally responsible for meeting most of the subsistence needs of their families. The man's contribution through on-farm production, wage labor, and/or artisan work is significant to total household income. The division of labor and the maintenance of multiple enterprises within the farm reflects a family's survival strategy. Thus, a critical issue in intra-household dynamics becomes who controls which resources.

The productive activities of rural women in Tierralinda are closely linked with their responsibilities for child care and homemaking. In each region, there are some tasks which men and women perform interchangeably, although there are other tasks associated more closely with men than with women. What women and men do varies by the agro-economic characteristics of the region in which they live, the demographic composition of the household, ethnic group membership, and the nature and size of farm operation.

In general, the role of women in agricultural production and natural resource management in Tierralinda is greater today than in the past. This change basically reflects the impoverishment of the countryside. Small farms are increasingly unable to provide an adequate standard of living or to absorb available family labor. The demographic pressure placed on the small farm sector has aggravated an unequal distribution of agricultural land. As a result, it takes longer to haul water and to find forage and firewood, even of poor quality.

B. RURAL EMPLOYMENT

With the exception of the sugar cane industry, most large farms are moving towards increased mechanization and there is not much demand for wage labor in the rural sector, forcing men to migrate to urban centers on a weekly, biweekly, or monthly basis. This practice is so common that in some rural communities, virtually all males between the ages of 15 and 50 are absent during weekdays. Studies have demonstrated that as much as 80 percent of the rural male labor force migrates to urban areas during at least part of

the year, and that as much as 60 percent do so year round. Since most of these temporary migrants have limited education and job skills, they usually work in poorly paid jobs. Rural families survive by allocating their labor in an efficient way. A rural family that can combine subsistence and/or market production with outside wage labor can usually make ends meet.

C. ALLOCATION OF LABOR IN RURAL AREAS

While there is considerable regional and seasonal variation, studies carried out in Tierralinda show that rural women work approximately 15 hours per day in activities related to production of agricultural and other goods, and maintenance of the family unit. Research has found that the work day of rural women begins between 4:00 and 5:00 am and ends between 8:00 and 9:00 pm.

Small-scale agriculture requires careful management of natural resources, particularly because land scarcities have pushed small farms into marginal areas. Small-holder households, therefore, have adopted techniques that are designed to optimize production and to balance risks.

Evidence reveals that women play a crucial role in maintaining biodiversity in a wide range of plant species, either in home gardens or via their work in seed selection and storage for food crops. Also, indigenous groups have been the primary protectors of biodiversity in livestock germplasm, whether among the native camelids or in non-native small ruminants such as sheep. Women are often the primary caretakers of these species.

D. ACCESS TO/CONTROL OF RESOURCES

Communal use of resources on certain kinds of lands is common, notably among foraging communities in the Amazon basin and indigenous communities with highland pastures. Individuals have the right to use community resources in specified ways because they are members of the social group, although ultimately the community makes major decisions about resource management.

Any development program affecting community-managed resources must negotiate with the indigenous authorities. The Law on Communal Societies specifies that each family is represented by one person, who is typically the male head of household.

The land tenure law allows for women to own title to land; however, they are third in priority after male heads of households and males over the age of sixteen. In practice, almost no women have title to land they farm either alone or with their male partner. Their lack of title can have many repercussions. Since the traditional—although not legally required—criterion for membership in agricultural cooperatives and other organizations is usually to be a land-owner, women cannot usually meet this requirement.

E. SOCIOCULTURAL CONSIDERATIONS

Cultural traditions contribute to restrictions on what women do, thus complex negotiations often accompany women's first excursions into non-traditional participation in production or community affairs. Patriarchal beliefs are held by both men and women, sometimes sustained by force. Under these circumstances, it may be difficult for women

to recognize their own interests, acknowledge them as legitimate and worthy, and act individually and collectively on their own behalf.

The degree to which men and women participate in development programs depends in part on the capacity of communities (communes, cooperatives, associations, etc.) to organize. Colonist families are generally poorly organized. Indigenous and highland groups are far better organized. In La Costa, men are reluctant to “allow” women to participate in projects that involve activities other than those associated with “women’s groups.”

As noted above, a household is represented by the head of household in the comunas; therefore, men tend to be in the majority at community meetings. When women do attend, they frequently are quiet and hesitant to actively participate in discussions. It is important to note, however, that there are no formal barriers to women’s participation in local organizations, but perhaps many informal ones.

Women’s participation is further constrained through the use of extension workers unaccustomed to working with women. Furthermore, many extensionists do not share the social, cultural and economic backgrounds of those with whom they work. Women, especially indigenous women, often possess a traditional knowledge base which is different from that of professionals.

LA COSTA

The economy of La Costa is characterized by marine fisheries, small scale poultry raising, rice production, and a limited amount of fruit production. There is one large banana plantation which is owned by a foreign corporation, and which employs mostly men recruited from other areas on a seasonal basis. The local cocoa industry has come to a virtual halt due to the deterioration of world market prices for cocoa in recent years.

Fishing is generally done in sail powered canoes in the open sea. A few fishermen have gasoline powered motors. Most of the fish is destined for home consumption, with the small surplus finding its way into the market either through roadside restaurants or inland markets. The fishing season extends virtually throughout the year, although there are short idle periods during the rainy season when activity is suspended due to weather. The fishermen control the use of the money generated by the sale of these fish in the fresh market. For home consumption, the fish is generally eaten fresh. However, a portion of the fish catch is dried or smoke cured for use during periods when fresh fish is not available.

Chickens are allowed to roam free around the homestead. Eggs are collected and sold, as are the live chickens, at local markets. Women control the money which is generated. The payment of school expenses for the family children is an important use of the income derived from the sale of poultry products. Clothing for all members of the family is usually purchased from the poultry proceeds. Rarely are eggs or chickens used for home consumption by the producers because these items are considered to be too valuable as a source of cash for the family.

Rice is produced on relatively small plots of one-quarter to one hectare. Unfavorable climatic variations and insect pests have become major yield reducers in recent year.

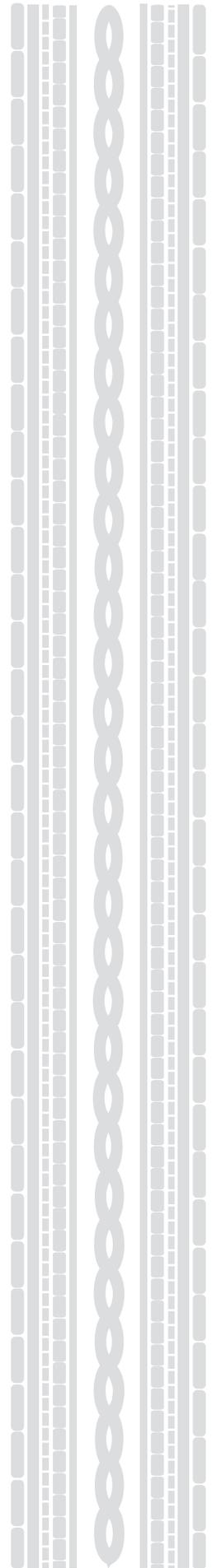
All land use decisions, and any decision on the purchase and use of agrochemicals, are made by the male head of the household. Wholesalers offer high-interest loans to land owners for the purchase of agrochemical inputs. Land titles are traditionally held only by the males, although there are a small number of exceptions.

Banana, papaya, and mango trees are planted in areas that are not required for rice production. These trees are grown on a small scale, often planted in isolated spots around the margins of the homestead. There is a plentiful source of wood for charcoal making. Although charcoal is not generally used by rural households, there is a large demand in near-by population centers.

Regional civil military conflict has significantly reduced the number of adult males. Within the past five years the number of female headed households has increased to 35 percent of the total. This has resulted in the necessity of some women assuming traditional male responsibilities, although this has not included fishing activities which has led to reduced household consumption of fish and income from its sale. Household food security is becoming a problem as a result of reduced rice yields in some years and reduction in fishing activities. Malnutrition and seasonal food shortages are becoming commonplace.

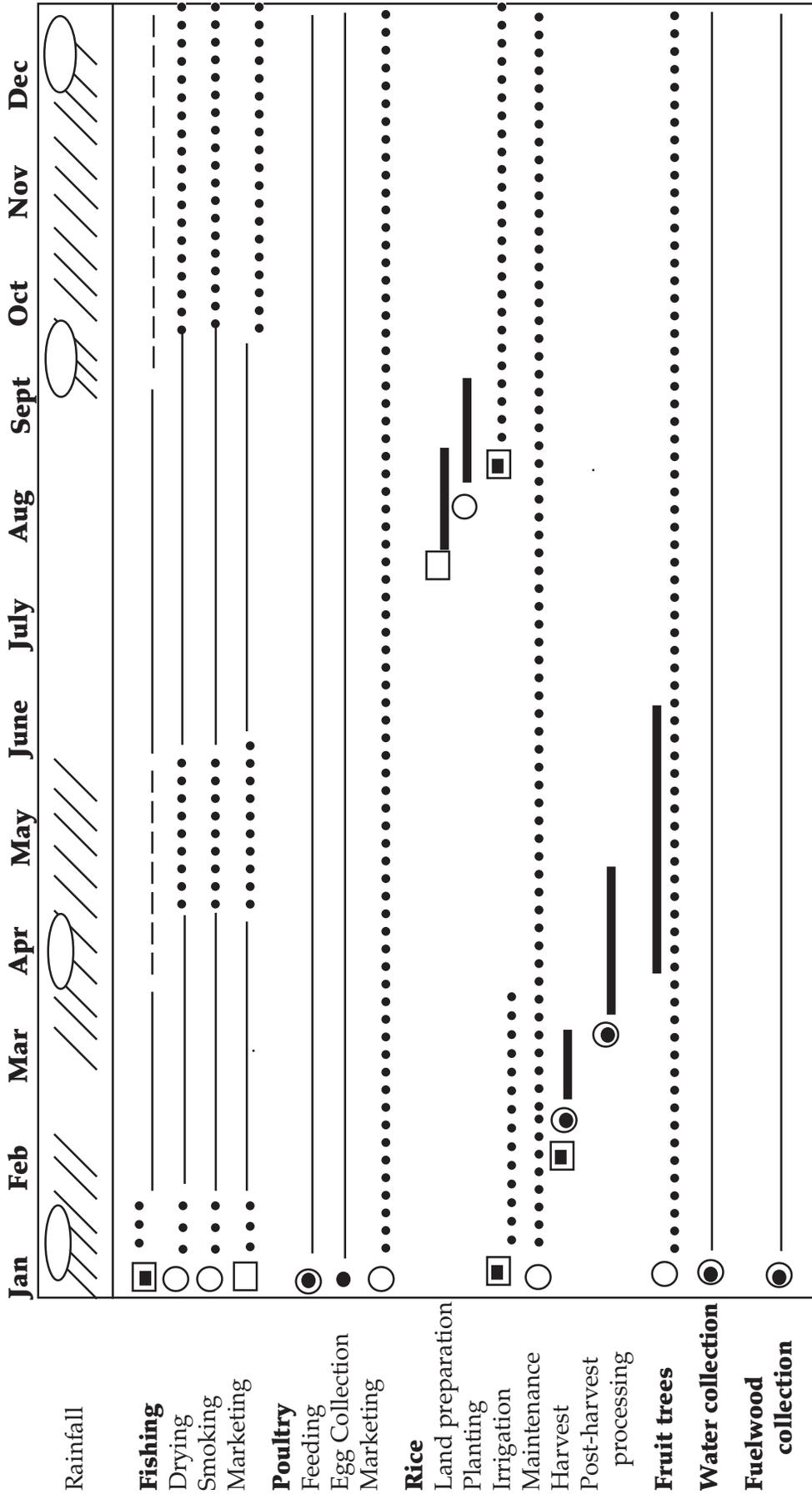
Overall, an adult woman’s productive and family responsibilities consume 15 hours of each day. A man’s workday is somewhat shorter and is characterized by more flexibility in terms of early morning and evening activities.

The Tierralinda Agricultural Extension Service infrastructure is fairly well developed within this region, but its activities are focused entirely on support of rice production. All of the extension personnel are male.



SEASONAL CALENDAR

LA COSTA



KEY: □ men * — continuous activity
 ■ boys ● sporadic activity
 ○ women ● more intense activity
 ● girls — suspended activity

* 35% female headed households

LA COSTA**TYPICAL DAY: WOMAN**

- AM 4:00 Get up
Sweep kitchen and rooms
Start fire
Wash and dress
- 4:30 Collect water for day
Put water on for coffee
- 5:00 Prepare breakfast and lunch
- 5:30 Serve breakfast
Start drying fish
- 6:00 Get children up
Wash, dress, and feed children
(Children collect eggs)
- 8:00 Prepare and send children to school
Weed in rice fields
- Noon 12:00 Return home
Have lunch and nap
- PM 2:00 Collect firewood
- 3:00 Meet fishing boats
Carry fish home
- 4:00 Start preparing dinner
Clean fish
Salt or start drying fish
- 6:00 Serve dinner
Clean-up dinner
Do handwork, mend clothes, while listening to news
- 9:00 Shower
- 9:30 Go to bed

LA COSTA**TYPICAL DAY: MAN**

- AM 5:00 Get up and dress
Collect tools/fishing equipment
- 5:30 Eat breakfast
- 6:00 Check nets, prepare/repair boats
Check/mend sails
Take lunch
Go fishing
- PM 3:00 Return from fishing
Sell excess fish
Clean-up boats, nets
Put away equipment
- 5:00 Shower and dress
Meet with other men
- 6:00 Return home for dinner
Listen to or watch news
(Meet with other men)
- 9:30 Go to bed

LA SELVA

La Selva is characterized by typical Amazon basin topography. It is a region of dense rain forests and few roads. Transportation is mainly by boat on the many rivers of the region. The population consists of indigenous peoples, Afro-Americans, and recent immigrants. The agricultural system is primarily slash and burn. Both men and women gather forest and river products for home and commercial use.

For all practical intents, there is no land tenure system in La Selva. As a parcel of land is cleared, it is claimed by the person who cleared it. The government considers the population to be squatters who have no formal title to the land. No credit systems exist in the region, mainly because there is no land tenure. Little or no agricultural extension services are available for the same reason. Seasonal out-migration is not very common.

The primary agricultural products of La Selva are cattle, maize, beans, manioc, and taro. Beans are an important cash crop; however, losses during storage are a serious problem. Often storage is required for particularly long periods of time due to marketing difficulties. Men have responsibility for managing the storage of the beans. Land use decisions are exclusively made by the men of the family, with women and children providing labor during the year as needed. Mestizos raise livestock for beef, dairy, and leather products. Daily management of the cattle herds is performed by the men, who make the decisions regarding when to buy or sell the family's cattle. When the family has sufficient cattle to allow for the sale of dairy products, this is done by the women. Income from the sale of cheese is controlled by women, while income from the sale of beef and leather products is controlled by men.

Vitamin-A and iodine deficiencies are responsible for widespread health problems. Seasonal food shortages are a problem in approximately one year out of three.

With respect to the primary crops, the land is cleared with slash and burn techniques. Agrochemicals are not widely used in La Selva. The women decide how much of the crops will be withheld for family consumption and how much will be sold. Men, however, retain control of the money generated by any family activity.

Indian and Afro-American women earn a small income from artisan products, principally weaving and basketry. But the middlemen who purchase these products reap most of their value.

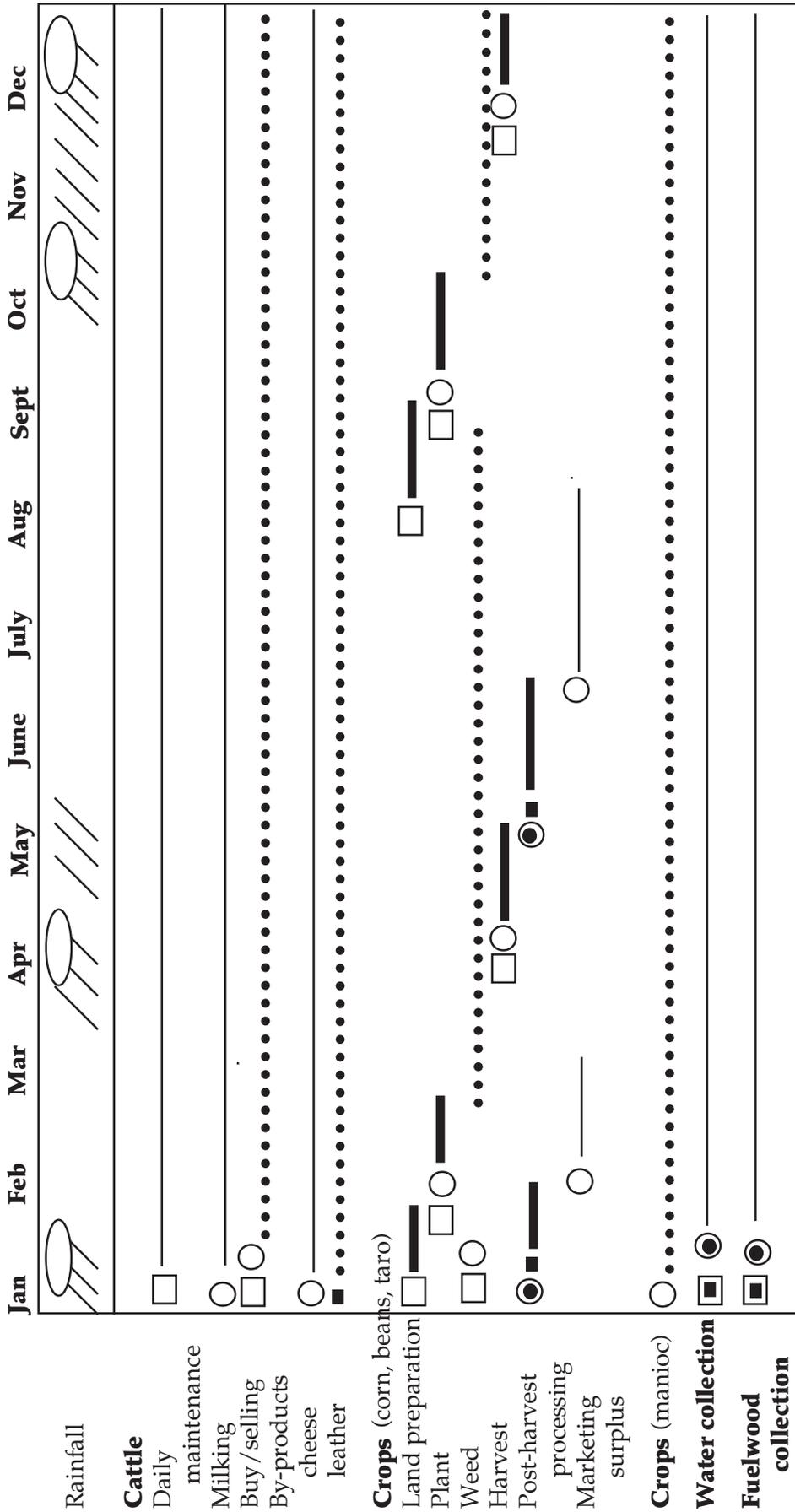
Formal agricultural extension services are unavailable, and access to technical information and support is lacking.

Most Indian and Afro-American households are surrounded by a forest that typically includes a wide variety of fruit trees, some cacao, tagua, tree species for local construction, and trees of commercial timber value.

Access to markets is limited since heavy seasonal rains make overland passage very difficult. Environmental interests have begun to pressure government to contain the slash and burn subsistence activities of La Selva farmers.

Women tend to work long and hard, with 15 hour days common. Men's days are also long and hard, although about one and a half hours shorter.

LA SELVA SEASONAL CALENDAR



KEY: ☐ men
 ■ boys
 ○ women
 ● girls

— continuous activity
 sporadic activity
 — more intense activity

LA SELVA

TYPICAL DAY: WOMAN

AM	4:30	Get up Wash and dress Start fire Collect water
	5:00	Prepare breakfast
	5:30	Serve breakfast Get children up Wash, dress, and feed children
	6:00	Milk cows Boil milk or start cheese making
	7:00	Sweep house Clean-up kitchen Prepare children for school Various domestic chores: shuck and grind corn cook lunch wash clothes shop for food
Noon	12:00	Go to fields with lunch Plant Weed
PM	4:30	Return home Shower
	5:00	Prepare dinner
	6:00	Serve dinner Clean-up dishes Weave, make baskets, or mend clothes Put children to bed
	9:00	Shower
	9:30	Go to bed

LA SELVA**TYPICAL DAY: MAN**

AM 5:00 Get up
Wash and dress

5:30 Eat breakfast
Collect tools, materials for day

6:30 Take cows to pasture

7:00 Repair any tools
Go to fields

Noon 12:00 Eat lunch in fields
Continue to work

PM 3:00 Return home
Clean tools
Bathe

5:00 Meet with other men, rest

6:00 Dinner
Listen to or watch news
Relax, drink

9:30 Go to bed

LA SIERRA

La Sierra is characterized by intensive farming of both valleys and steep mountainsides. The population of La Sierra is 50 percent mestizo, 45 percent Runasimi-speaking indigenous people, and five percent Spanish. Land is scarce and the average family farm has been steadily decreasing in size as each small farm is subdivided for the male children of the family. Land title is held by the male head of most households. Women have never been permitted title to land.

The custom of dividing the farm among the male children has led to increasingly small plots of land, more farming of fragile lands, and less productivity from the overworked soil. It has also caused seasonal and permanent out-migration by many men seeking off-farm employment in cities and as seasonal workers in the sugar cane fields of the coast. This seasonal and semi-permanent out-migration makes for a significant percentage of female-headed households.

Credit for small farmers is practically non-existent although a new government program is being instituted to extend agricultural credit to owners of small farms. No outreach program currently exists to inform farmers of this new program and give them the technical assistance necessary for obtaining credit through this new program.

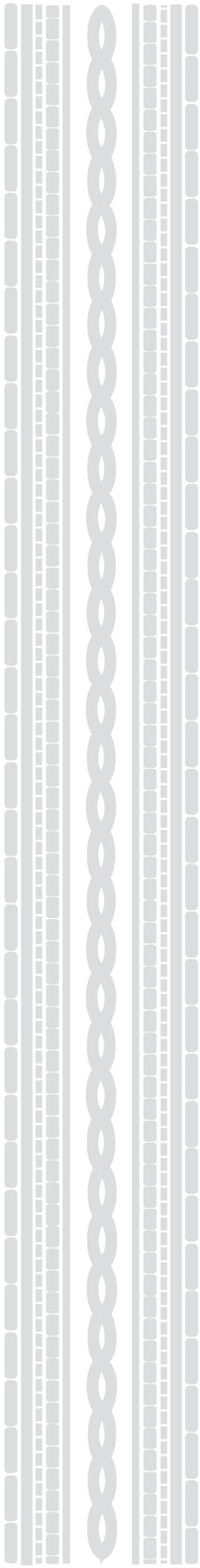
There is a fairly well developed agricultural extension service infrastructure in La Sierra which can provide sufficient technical information to small farmers. All extension agents are men. Potatoes and onions are the main crops; sheep and goats are the primary livestock. Small herds of llama are maintained by some women who utilize the fleece for household clothing and artisan products. Small livestock such as guinea pigs, swine, and poultry are also common. Other crops such as quinoa, barley, and field peas are raised. Some women keep kitchen gardens of herbs and vegetables. Decisions related to allocation and use of private land are made jointly by the adult men and women in the household. Decisions pertaining to use of communal grazing lands are made by a village committee comprised of heads of household.

Decisions to sell any of the animals are made jointly between the woman and the man, although the actual responsibility for selling the animal is the man's. The man controls the money earned from the sale of the animals, and the woman controls the money received from the wool and any of the products she might make such as weavings or clothing. Women also control the income from any small livestock they raise.

Potatoes and onions are planted for household consumption and for sale as cash crops as well as for trading for corn. There is an increasing use of agro-chemical products in the production of these crops. In general, the men decide on what products to use and when; it is left to the women to apply them. Surplus crops to be sold after satisfying household needs are decided jointly by the man and the woman. Any money earned from the actual sale of the surplus is controlled by the man.

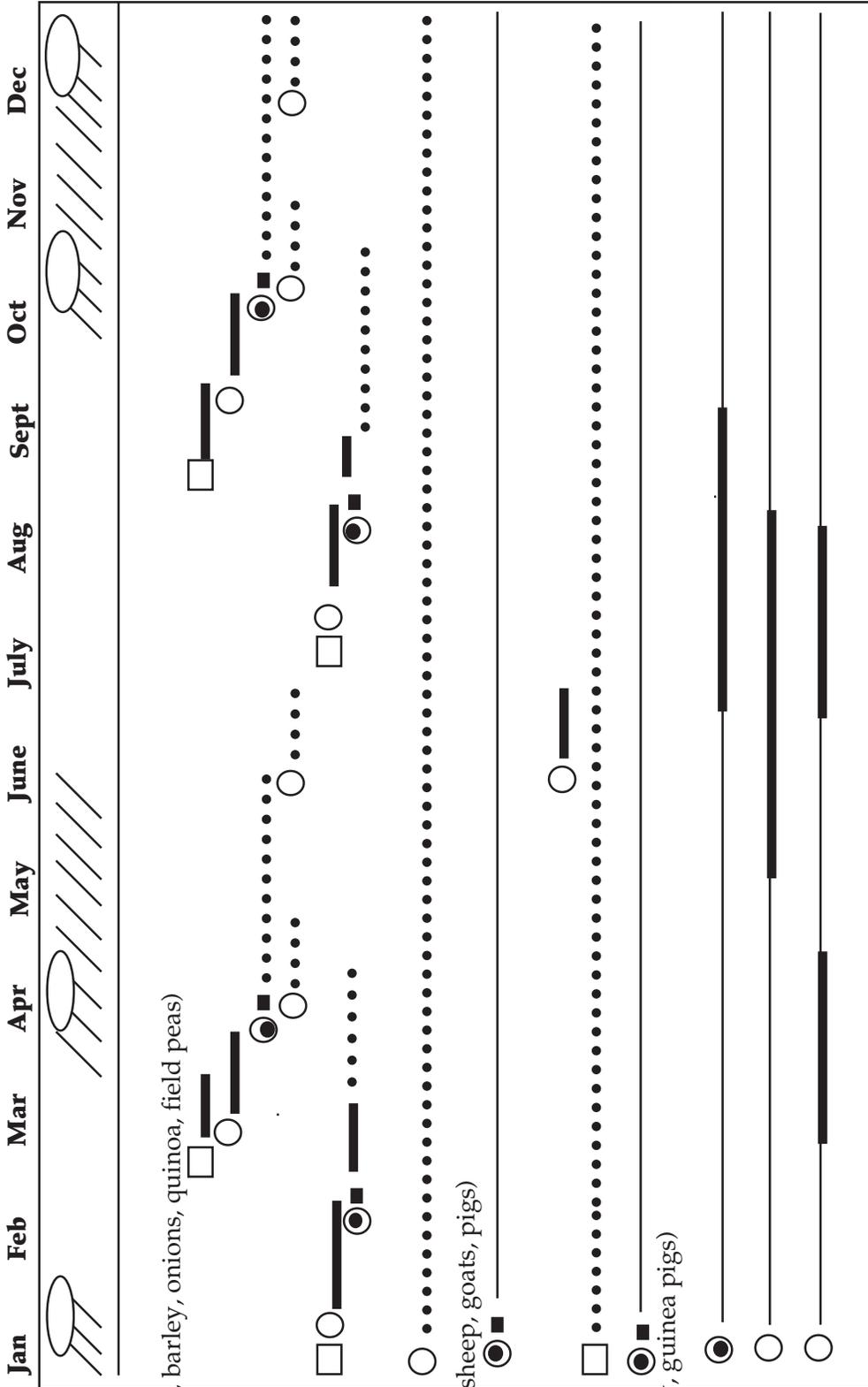
With deforestation and increasingly scarce accessible water sources, the family must go farther from the home to meet these basic energy and water needs. Household food shortages are a recurring problem for the poorest segment of the population during a period of approximately eight weeks preceding the potato harvest. Health problems resulting from vitamin-A deficiency are detectable in about 20 percent of the population.

On average women work 15 hours a day in La Sierra. They have little free time for non-productive activities and it is culturally unacceptable for the woman to be seen doing nothing. Although hard-working as well, the man's day is considerably shorter, with his work ending upon arrival from the fields. For those women who are permanent or seasonal heads of households, the day is even longer as they must take over the activities of the absent males.



SEASONAL CALENDAR

LA SIERRA



KEY: □ men * — continuous activity * when men are present, though often gone
 ■ boys ●●●●●●●● sporadic activity during harvest
 ○ women — more intense activity
 ● girls

LA SIERRA

TYPICAL DAY: WOMAN

- AM 4:00 Get up, give thanks to God
Wash and dress
Start fire; put water on for coffee
Sweep kitchen and surroundings
Prepare breakfast
- 5:30 Serve breakfast
- 6:00 Get up, wash, dress and feed smaller children
Take cows to pasture
- 8:00 Feed pigs and other small animals
Cook lunch
Collect firewood
- Take lunch to fields
Stay and work
(plant, weed, or harvest)
— OR —
Return home to do domestic chores: Shuck and grind corn
Wash and mend clothes
Knit or crochet
- PM 1:00 Eat lunch, sometimes nap
Clean up kitchen
Go to market
Give water to animals, move animals to forage
Iron
- 4:00 Prepare and have coffee
- 5:00 Bring animals back from pasture
- 6:00 Prepare and serve dinner; clean up
- 7:30 Watch TV or listen to radio while knitting,
spinning wool, crocheting
- 9:30 Go to bed

LA SIERRA

TYPICAL DAY: MAN*

- AM 4:30 Get up
Dress
Collect tools
- 5:30 Eat breakfast
Prepare tools, seeds, etc.
Go to fields
(or occasionally take animals to market)
- PM 1:00 Eat lunch
- 3:00 Return from fields
Shower
Nap
Meet with men for relaxation, conversation, or meeting
- 6:30 Eat dinner
Watch TV
- 9:30 Go to bed

* During time at home, rather than working away from home.

TIERRALINDA AGRICULTURAL DEVELOPMENT PROJECT

I. Problem Statement

Tierralinda is among the most biologically rich countries in the world. Its variety of natural areas includes tropical rain forests, cloud forests, coastal dry and moist forests, semi-arid highland grasslands, mangrove swamps, and marine resources. Tierralinda is divided into three environmental zones: Sierra, Selva, and Costa. The large variety of plant and animal species in these ecosystems makes them among the world's highest priority for preservation. These areas also supply environmental services that are essential to the future social stability and economic growth of Tierralinda.

Deforestation for agriculture (including cattle raising), accentuated by rapid population growth and lack of urban employment opportunities, is the principal cause of land resource degradation in Tierralinda. Expansion of agriculture coupled with the degradation of natural habitats from extraction of timber, mining and petroleum exploration could result in the complete deforestation of Tierralinda by 2025. Soil erosion and watershed deterioration are already reaching alarming levels although this is not widely acknowledged among the rural population. At the root of these problems are:

1. Increased national demand for food and fiber met through conversion of forested land to agriculture;
2. Expansion of agriculture to marginal hillside and other fragile lands;
3. Unsustainable land use traditions;
4. Inadequate access by farmers to information and capacity building opportunities for innovative land use techniques;
5. Scarcity of well-trained, Tierralindan agricultural extension professionals;
6. An inadequate policy framework for agricultural and natural resource development;
7. Shortage of resource management institutions at the regional and local levels; and
8. Inadequate research capability to develop and select appropriate technologies.

II. Agriculture Project Purpose

The purpose of this project is to enhance household food security through strengthening local technical assistance institutions and building local capacities for adoption of appropriate land use practices which increase yields while conserving Tierralinda's land resource base.

III. Project Goals

(To be determined by project design consultants.)

GENDER INFORMATION FRAMEWORK (GIF) WITH RANKING OF NEEDS ASSESSMENT

RATIONALE

The Gender Information Framework (GIF) is a gender analysis tool which focuses on the household and the family system. This session introduces the GIF tool in combination with the Participatory Analysis for Community Action (PACA) tools of seasonal calendars and daily schedule to provide data for developing gender-sensitive project goals, objectives, and milestones. Information is used from a case study to demonstrate pairwise ranking of community needs.

TIME



3 hours

GOALS AND OBJECTIVES

GOAL 1

To explore culturally determined family systems and how that information is key to determining project designs that meet their stated goals.

OBJECTIVES

1. To explain the categories contained in the Gender Information Framework.
2. To identify several sources, not including individual interviews, that would provide information on family systems.
3. To write goals, objectives, and milestones that recognize gender differentiated roles and responsibilities.

GOAL 2

To participate in community needs assessment with ranking of priorities

OBJECTIVES

1. To develop gender-sensitive lists of community needs
2. To rank needs by gender group and discuss gender differences in priorities.

SESSION OUTLINE

- I. Introduction (15 minutes)
- II. Case study (45 minutes)
- III. Community needs assessment (45 minutes)
- IV. Application to a project (15-45 minutes)
- V. Summary (15-30 minutes)

TRAINER PREPARATION

1. Read the background reading Gender Information Framework with the form as reference. Add any examples of your own to the session plan where the GIF is introduced.
2. Read the case study and determine which of the regions are most appropriate to the participants. It is possible to use more than one, but that limits the effectiveness of the report out.
3. Select and copy the appropriate handouts based on your decision above.
4. Read the case study and complete the GIF so that you are prepared to answer questions.
5. Determine which of the options in the final step you will use to apply the GIF to a project.

MATERIALS



- Blank flip charts
- Marking pens
- Masking tape
- Table tents to identify regions, La Sierra, La Costa, La Selva (if using more than one region)

FLIP CHARTS

- Gender Information Framework (outline)
- Case study tasks

HANDOUTS

Please note: The following handouts start on page 65 and follow the “GIF with Project Work” training session in this booklet.

- Case Study: Tierralinda
 - Briefing Paper Prepared by Ministry of Planning
 - Notes on the Case
 - La Sierra (narrative, seasonal calendars, daily schedules)
 - La Costa (narrative, seasonal calendars, daily schedules)
 - La Selva (narrative, seasonal calendars, daily schedules)

- Peace Corps/Tierralinda Assessment Report
- Tierralinda Agricultural Development Project
- A Peace Corps Project—from country where training being done

Please note: The following handout starts on page 34 in the “Introduction to a Systems Approach” training session in this booklet.

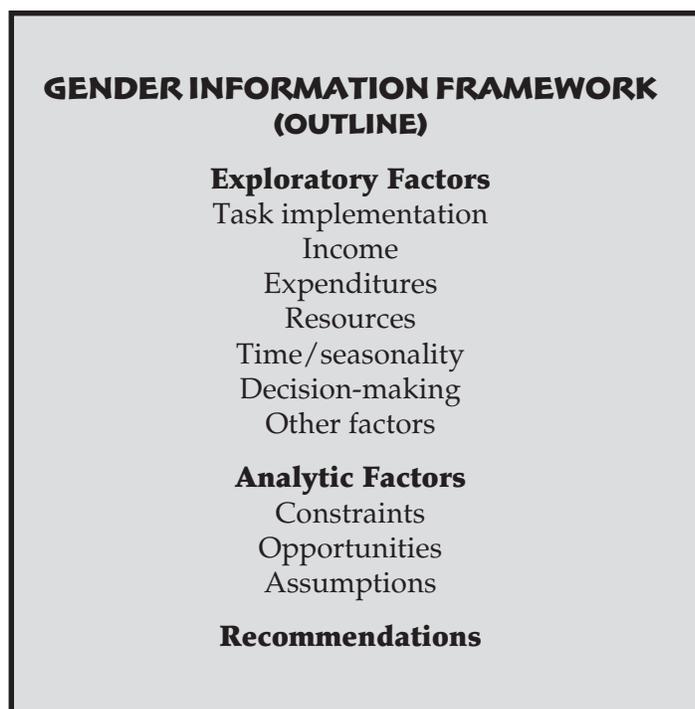
- Gender Information Framework

PROCEDURE

I. INTRODUCTION (15 minutes)

Refer to the Contextual Analysis tool, introduced previously, which helps explore gender issues at all levels. This session will focus on a tool that can be used at the household level.

Introduce the GIF tool by describing its parts using a flip chart:



- A.** Exploratory factors are the various aspects of the household:

TASK IMPLEMENTATION

Who does what tasks: household activities, agricultural production, natural resource management, family enterprise activity, extra income earning activities—both household tasks and tasks contributing to family income production.

This will frequently be the starting point of gender analysis: being aware of who does what in the situation the project will affect. This information is often the first step in identifying the target audience for a project; and it is important to ensure that resources are targeted to the right person(s) to achieve project objectives.

INCOME

Who earns what through agricultural production, family enterprise activity, and extra income earning activity? What are the primary sources of income for men and for women, and for boys and for girls, if any?

In most parts of the world, women have traditionally made significant contributions to family income—through cash earned, cash savings, or self-provisioning, which also represent family income. Women’s economic contributions to the household have been under-acknowledged for several reasons. Often coming in small amounts, women’s income is often invisible.

EXPENDITURES

Who contributes what toward meeting family financial obligations? What expenditures are there? Do men and women have individual financial responsibilities?

Men and women have different expenditure patterns and financial responsibilities. In some parts of the world, men and women have very separate purses, with each responsible for different household expenses. This factor is important in the design of projects that will affect family income. It provides a broader perspective for decisions on a project’s or program’s target audience.

RESOURCES

Who has access to and who controls the resources needed to improve economic and social well-being. This look at “resources” includes land, labor, capital, information, education, technical assistance, and other elements that lead to enhanced economic and social well-being.

“Access to” and “control of” have very different meanings and implications. Access refers to being able to use something but not establishing parameters for its use; it can always be taken away. Control of means that there is decision-making power over usage.

For resources required by a project, how is access to and control of these resources different for men and for women? How does that affect ability to increase economic productivity or improve family well-being?

TIME/SEASONALITY

What are the daily activities and uses of time? How do they differ for men and for women? In what ways do daily activities change according to the seasons?

When are project beneficiaries most available to carry out new activities? What effects does the project have on other daily or seasonal activities and sources of income?

DECISION-MAKING

How are decisions made within the family? What are the different roles filled by men and women at different stages of decision-making? Who must be involved in the decision-making process to ensure that the particular decisions are implemented?

OTHER FACTORS

In addition to the factors above, what others might impact on a particular project? Decide on questions to ask to help determine whether there are or may be gender-related differences to each of these other factors.

B. Analytic factors: these are conclusion-drawing factors:

Constraints that affect men and women differently

Opportunities for either men or women in a specific area or sector

Assumptions that were made about the constraints and opportunities

C. Recommendations, depending upon reasons for analysis:

- Specific actions for project implementation
- Re-design or refinements to project

II. CASE STUDY (45 minutes)

Describe tasks of groups for next 40 minutes: (unveil first two steps of “Case Study Tasks” flipchart).

CASE STUDY TASKS

- 1. Read case (introductory part and La Sierra), analyze data and enter it on GIF. Use (1) narratives, (2) results of two tools used in community: seasonal calendars, daily schedules.**
- 2. Discuss and identify gender-related constraints, opportunities, and assumptions. Print on flip charts provided. Select reporter.**

Divide participants into small groups of five or six.

Distribute the case study handouts and the GIF form for agriculture/natural resources.

Remind of time five minutes before end. Ask them to post their flip charts around room. As groups, have them go to the other groups’ charts and read and discuss any differences they found.

In the total group, discuss any questions that arose during the gallery above.

Trainer note: This would be an appropriate stopping point for a 15 minute break.

III. COMMUNITY NEEDS ASSESSMENT WITH PAIRWISE RANKING (45 minutes)

Explain that we are going to use the data from the case study to introduce an important PACA tool: ranking of needs assessment.

Divide participants into two groups. One group will take the roles of men in the case study, the other group the roles of the women. Each group will have a facilitator who will conduct the next steps:

1. Assume you are a group of men (or women) living in La Sierra. Making use of the information from the case study (and any additional plausible information you wish to add), I would like to have you consider what are the problems, or obstacles, you think your community faces? As you think of problems, call them out to me and I will write them down where everyone can see. You do not have to agree with everyone else's ideas; we will list everything but you may discuss them.
2. Once the list is made, ask if anyone wants to say anything about the items. Let them discuss as they wish.

Note: the discussion about the items is extremely useful; allow as much discussion as possible under the time constraints.

3. If the list is more than five items, allow the participants to vote on the two issues they think are most important. Each participant has two votes. Take the top five or six items and prepare another sheet with the items listed both down the left and across the top. Draw lines to make a grid. Then ask about each pair of items... for example, "Which is more important, lack of a clinic or poor lands for crops." Have them vote. Note the item receiving the most votes in the juncture of those two items:

	Lack of clinic	Poor land	No market		
Lack of clinic	X	Poor land	Lack of clinic		
Poor land	X	X	Poor land		
No market	X	X	X		

4. After completing the comparison, count how many times each item was chosen as the most important. Then rank the top three problems according to those chosen most often. List these three items on a separate flip chart page.
5. Ask someone in the group to report out the list when they meet with the other group.

Bring both groups together and hang up both of the lists. Have the reporter from each group explain the list. Ask the group to discuss the differences they see. Why are there the differences?

Stop the exercise at this point. Have the participants get out of role and look at the ranking exercise they just completed **as trainers**. Ask what potential next steps might be if:

- an APCD had been doing this exercise with a community.
- a PCV posted in the village initiated this exercise.

IV. APPLICATION TO A PROJECT (15-45 minutes)

Option 1:

Use the handout from the case study that gives a Problem Statement and Agriculture Project purpose only. Assign the following tasks to the original groups that analyzed the case study:

Use flip chart to unveil final task:

CASE STUDY TASKS (CONTINUED)

- 3. Read project description and purpose.**
- 4. Write one goal for the project which may have gender implications and requires sex disaggregated objectives to meet that goal. Write the objectives. Print on a flip chart.**
- 5. For one objective, develop milestones which disaggregate by sex. Print on flip chart.**

Post flip charts and either have each group report out or have participants circulate and read them.

Option 2:

Have country groups/APCDs and their counterparts/or some other grouping work in small groups using their own project to modify any goals/objectives/milestones that should address gender differences. They may need to make a list of questions for further analysis.

For reporting out, ask participants to discuss the process they went through as they worked on their project. What did they discuss? Why? If desired, ask groups to give one example of a modification they made, explaining why.

V. SUMMARY (15-30 minutes)

Review the various sources of information used in this case study:

- Narrative
- Seasonal calendars
- Daily activities
- Ranking of community needs assessment

Where did it come from? How much confidence can we have in it? How can we get insightful and valid information that forms the basis for project planning, monitoring, or evaluation?

Make a transition from using case study information to gathering information firsthand through participatory analysis—our focus from here on.

REFERENCES

1. *The Peace Corps Programming and Training System Manual (PATs)* [ICE – T0054].
2. *Programming and Training for Peace Corps Women in Development Projects* [ICE – T0084].
3. Training session “Needs Assessment with Priority Ranking” (Booklet #5).

EXPERIENTIAL INTRODUCTION TO PARTICIPATORY ANALYSIS FOR COMMUNITY ACTION (PACA)

RATIONALE

Since PACA uses a participatory approach, it is appropriate to introduce the key concepts in a participatory way.

TIME



1 1/2 - 2 hours
(depending on the size of the group)

GOAL AND OBJECTIVES

GOAL

To introduce the key elements of PACA in a participatory way.

OBJECTIVES

1. To engage in a visual presentation of ideas.
2. To reflect on the process to highlight the key elements of PACA.
3. To compare and contrast PACA with other participatory methodologies.

SESSION OUTLINE

- I. Introduction (5-15 minutes)
- II. The activity (30-45 minutes)
- III. Process the activity (15-20 minutes)
- IV. Parallels with PACA methodologies (30 minutes)
- V. Transition (5 minutes)

TRAINER PREPARATION



1. Depending on the time and structure of your workshop, determine if this session will be the culmination of the first day, or an introduction to Community Mapping. If Community Mapping is used, refer to the specific session plan for that tool (see Booklet #5) so that all elements are included, both in producing the map and in discussing the finished maps.

2. Determine how the participants can be divided into groups to present two different views; if possible, include gender grouping.

MATERIALS



Per group:

- 1 or 2 blank sheets of flip chart paper
- 5-8 colored marking pens, various colors
- Masking tape
- If doing mapping, small pieces of colored paper and tape or glue sticks

HANDOUT

- Participatory Analysis for Community Action (What is It? Key Elements)

PROCEDURES

I. INTRODUCTION (5-15 minutes)

Alternative A (culmination of first day's sessions)

To use this session as an evaluation or summary of the first day, begin by reviewing the topics covered over the course of the day, listing them on a flip chart. Then give the group some type of assignment such as,

“Discuss all of the items we have covered and how they might apply to the work you do. Then, in the groups designated, create a visual representation that summarizes your discussion.”

In this case, the small groups should have something in common, such as people who work with youth or adults, in rural or urban areas, younger and older participants, service providers and administrators, etc. If possible, include gender sub-groupings within other categories, or, if there is no other distinguishing factors, group by gender.

Alternative B (introduction to community mapping)

To introduce the mapping tool, select an area known by all members of the group, such as the community, or a training or work site. Explain they will have an opportunity to draw a map of _____. You want them to work in designated groups.

The most basic designation is men and women. Depending upon the group, other designations might be those who live in town versus those who live in the suburbs or other towns, different type of job categories or floors of the office building, age groups, ethnic or nationality groups (if appropriate). Read and follow the Community Mapping session plan.

II. THE ACTIVITY (30-45 minutes)

Divide into predetermined groups. Provide supplies and identify work space. Inform each group of the amount of time available.

Monitor groups to make sure they get beyond discussion to drawing. If they have not started drawing before half of the time has elapsed, encourage them to begin drawing.

At the end of the work period, ask each group to post its work where everyone can see it.

III. PROCESSING THE ACTIVITY (15 - 20 minutes)

Ask a representative from each group to explain the group's work.

Facilitate discussion among the groups using the following questions:

1. What is different between the visualizations? What is similar? Why might that be?
2. What process did you use to get your drawing done?
3. What did you learn about each other as you discussed and drew?
4. If maps were drawn, discuss the coded items, such as frequency, likes and dislikes, and needs identified. Identify similarities and differences, possible reasons for them.

IV. PARALLELS WITH PACA METHODOLOGY (30 minutes)

Ask the participants to reconstruct the exercise they just completed by listing the steps on a flip chart.

Then ask:

What is your previous experience with participatory methods? Have any of you used Rural Rapid Appraisal (RRA) or Participatory Rural Appraisal (PRA)? If so, how did you use the techniques? (Get examples of purpose and how it was done. Often techniques are called, or thought to be, participatory when in fact it is the outsider making all the judgments and conclusions. Take participants' examples without making judgments about them.)

Distribute the handout "Participatory Analysis for Community Action" and clarify any points not previously covered, especially:

- The purpose of PACA is to lay the groundwork for the community to determine its own needs and what it wants to address.
- The development worker establishes a partnership to assist the community to determine what it wants, not what is dictated from outside.
- To insure all voices are heard, the larger group is subdivided into smaller groups.

Ask:

What are the differences between this approach and ones you have used before? (These may include formulating assessment based on development workers' perceptions without even asking questions directly of community members, or asking specific questions and analyzing the data oneself. If community members were engaged in conversation, they may have been a few community leaders, often men only, or other configurations that limited the scope of the information gained. The biggest difference should be that the PACA methodology has the outsider facilitating representative groups within the community's own assessment of their reality.)

PACA presents gender-sensitive tools to the community, then seeks to encourage the community to expropriate the information that results from the use of the tools as its own. Ideally, at this point, the tool (activity) becomes a tool of empowerment, and the community assumes the responsibility for action on the information as its own.

V. TRANSITION (5 minutes)

Make an appropriate transition to next activity.

Next activities may include practice in the skills needed to carry out the tools: interviewing, observation, facilitation, and the introduction to and practice in doing each technique.)

NOTES



PARTICIPATORY ANALYSIS FOR COMMUNITY ACTION (PACA)

WHAT IS PACA?

It is a methodology designed to communicate information, identify needs, and lay the groundwork for community action to solve problems. It facilitates the development of an effective and open partnership between the development agents and the representative segments of the local community to design, implement, and evaluate development programs.

WHERE IS PACA USED?

It is implemented in the local communities, in neighborhoods, in organizations, and in households where the targeted population resides.

WHO USES PACA?

Development agents, such as Peace Corps Associate Directors, Volunteers, local counterparts, and community members.

HOW IS PACA CARRIED OUT?

PACA relies on the active and full participation of the local community with the development agent **eliciting a partnership** rather than imposing an agenda. PACA methods may be used in various phases of community action: analysis, identification of projects, determination of indicators, monitoring, and evaluation. The analysis part of the process may be relatively rapid, involving one or more visits to a community. The development of community action, monitoring and evaluation will take longer and may be the focus of a development worker's assignment over several years.

KEY ELEMENTS OF PACA

- Interviewing separate groups of the community, e.g. men and women, youth and adults
 - Facilitating **their** discussion in small and large groups
 - Formatting their ideas visually
 - Helping them compare and contrast their own perceptions, e.g. as men and women
 - Using their own analysis for project design, site selection
- or**
- Facilitating their own community action

PACA GALLERY

RATIONALE

The Participatory Analysis for Community Action methodologies that the Peace Corps has developed to ensure the inclusion of women in analysis and activity planning is a very important part of the Gender and Development approach. Participating in the use of one of the tools makes an indelible impression on training participants. However, time limitations sometimes make it infeasible to schedule a participatory activity that resembles PACA methodologies in the training room, let alone do field work. However, some of the feeling of the participatory nature and the impact of the information gained can be revealed through a combination of description, photos, and samples of products from the field.

TIME



1/2 to 1 hour

GOAL AND OBJECTIVES

GOAL

To understand PACA methodology, the types of information revealed, and the potential impact of the processes involved.

OBJECTIVES

1. To identify the key elements of PACA methodologies.
2. To see the types of information revealed.

TRAINER PREPARATION



1. Collect some examples of PACA work in the field:
 - Borrow originals, or make copies of, maps, seasonal calendars, daily activities.
 - Take or request photos and slides from actual field work.
 - If appropriate, video some groups involved in the activities.

If no field examples are available, examples from staff or Volunteer training programs can be used.
2. Mount photos on flip charts with headings or brief descriptions.
3. If slides are used, arranged in carousels.
4. Prior to the session, post examples and photos on the walls of the training room. Set up slides and video, if used. (This may take more time than anticipated. Allow at least 30 minutes to set up for this session.)

MATERIALS



- Large sample maps, calendars, daily activities from field work or training sessions
- Photos, slides or videos
- Slide projector, VCR and monitor, if needed

HANDOUT

- What is PACA?

PROCEDURE

Several different procedures may be followed, depending on the amount of time, depth of knowledge expected, and materials on hand. Videos or slides using an automatic changer can be shown to one side as you introduce the session. They can also be started just as participants begin to move about the room.

Several scenarios are described below.

Option A:

1. Explain what PACA is, using the “What is PACA?” handout.
2. Describe one or more settings where it has been used. If wall examples are from one particular place, describe that setting in detail.
3. Using the samples on the walls as visuals, describe each of the techniques that were used, and some of the results that can be seen.
4. Have participants walk around and look at the samples.
5. Answer questions informally, or bring group back together for questions and answers.

Option B:

At the end the introductory session “WID, GAD, and PACA”, at a break, or at the close of the day’s training, participants can be invited to circulate and look at the examples.

Option C:

Have room set up with examples and slides or videos running as training participants enter the room. Encourage them to take the first fifteen minutes to read and look at the samples. In this scenario, you might have more written material on the walls to explain the sites or training situations reflected and the steps in conducting the participatory tools of those you have examples. Allow for some time for questions about the display in your training schedule.

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