

Harmonized Gender and Development Guidelines

***for Project Development,
Implementation, and
Monitoring and Evaluation***

TRAINING MANUAL



National Economic and Development Authority

National Economic and Development Authority
Pasig City
November 2007

Consultant: Jeanne Frances I. Illo

This training manual was prepared and printed under a technical assistance grant from the Asian Development Bank (ADB). However, the content is that of the National Economic and Development Authority and does not necessarily reflect the views of the ADB, or the governments it represents.

PREFACE

In 2005, the National Economic and Development Authority (NEDA) realized that to promote the use of the Harmonized Gender and Development Guidelines by Philippine government agencies, non-government organizations (NGOs), and our academic partners, a purposeful capacity development campaign was needed. The World Bank was a major ally in this endeavor, having funded a training session for officials and technical staff of the NEDA central office and a number of NEDA regional officials and personnel. The World Bank also supported several learning sessions for the members of the Official Development Assistance Gender and Development (ODA-GAD) Network.

In 2006, the Asian Development Bank (ADB) stepped in and supported the training of trainers (TOT) from national government agencies, NEDA central and regional offices, regional line agencies, NGOs and representatives from the academe. In all, five trainings were conducted, including one in January 2007 that was designed exclusively for the National Commission on the Role of Filipino Women (NCRFW). The expectation was that the TOT participants from national government agencies will roll out the training in their own agency. In the case of the regional participants, they were expected to roll out the training to local government units and other agencies in the region. With this training manual, NEDA hopes to assist groups that intend to run application, mentoring, or orientation sessions on the harmonized GAD guidelines.

The training manual is based not only on the training of trainers, but also on the innovations that TOT participants have introduced on the TOT design. These innovations have enhanced the relevance and usefulness of the training on the harmonized GAD guidelines. The training manual, therefore, captures the best of the experiences of designing and running a training workshop, from the TOT program in 2006 and early 2007, to the most recent in Region VI in October 2007.

Many individuals have contributed to the conceptualization and implementation of the TOT and the follow-up training workshops. Four people, however, play pivotal roles in getting the ADB technical assistance project off and running. Allan O. Millar and Rhoda A. Tiongson, both formerly of NEDA, shepherded the project from the beginning until their departure in April 2007. Allie N. Cortez, who inherited the project, coordinated the “re-echo” trainings by two national agencies (Department of Environment and Natural Resources and Department of Health), and several NEDA regional offices and regional training teams. The fourth person embodies the knowledge of and passion for the harmonized GAD guidelines: Jeanne Frances I. Illo. She is not only the ADB technical assistance consultant, but is also a member of the ODA-GAD Network and, more importantly, a friend and ally of NEDA in the campaign to get more and more people and agencies apply the guidelines in their development work. To these individuals and the growing group of advocates and trainers who have contributed directly or indirectly to the preparation of this training manual, thank you.



ERLINDA M. CAPONES
Director, Social Development Staff
NEDA

CONTENTS

PREFACE	iii
List of Boxes and Handouts	v
List of Notes to the Training Team	vi
 BACKGROUND	 1
Preparatory gender sensitivity training session	1
The workshop on the harmonized GAD guidelines	2
 INTRODUCTORY MODULE	 5
Welcome remarks	5
Activity 1: Introductions and setting of ground rules	6
Activity 2: Expectations check	7
Activity 3: Presentation of the training or session design	8
Activity 4: Introduction to the harmonized GAD guidelines	8
 MODULE ONE: GAD Guidelines for Project Development	 11
Objectives	11
Session 1: Presentation of the GAD checklists ..	12
Session 2: Application of the checklists (practice session A)	25
 MODULE TWO: GAD Guidelines for Project Management and Implementation	 29
Objectives	29
Session 1: Presentation of the GAD checklist	29
Session 2: Application of the checklist (practice session B)	32
 MODULE THREE: GAD Guidelines for Project Monitoring and Evaluation	 35
Objectives	35
Session 1: Presentation of the GAD checklist	35
Session 2: Application of the checklist (practice session C)	38
 MODULE FOUR: RE-ENTRY PLANNING	 43
Objectives and outputs	43
Activity 1: Presentation of agency or office plans	43
Activity 2: Consolidation of plans	44
 PARTIAL LIST OF TRAINING RESOURCE MATERIALS	 46

LIST OF BOXES AND HANDOUTS

Boxes

1	Basic GAD orientation program	1
2	Content and process flow	2
3	Learning model	3
4	Design of the introductory session	5
5	Sample questions that can be raised during the session	9
6	Design of module 1	11
7	Important elements of a gender-responsive project design	14
8	Design of module 2	29
9	Sample gender issues in organizations	30
10	Design of module 3	35
11	Key elements of a gender-responsive M&E	36

Handouts

1	Introduction to the harmonized GAD guidelines	9
2	Combined generic checklists for project identification and design	15
3	Logical framework analysis or project planning matrix	17
4	Suggested key questions in engendering the logical framework analysis	18
5	Basic gender analysis concepts	20
6	The Bulolakaw case	22
7	Practice session A workshop instructions	26
8	Practice session B: Fish-bowl or role-play instructions	32
9	Practice session C: Enhancing M&E indicators	39

List of Notes to the Training Team and Materials in the CD-ROM

Notes

1	Focus of the welcome address	6
2	Mandates for the harmonized GAD guidelines	6
3	Rights and rules	7
4	How to process expectations	7
5	Objectives and contents of the harmonized GAD guidelines	8
6	Project cycle	13
7	Discussion on the basic concepts and tools of gender analysis	19
8	How to run a gender analysis session through buzz groups	22
9	Sample results of the gender analysis of the Bulolakaw case	23
10	Preparing for practice session A	25
11	Managing the workshop group	27
12	Commenting on workshop group outputs	28
13	Scheduling of GAD mainstreaming inputs	30
14	Handling practice session B	33
15	Sample summary of discussion of observations of the skits	33
16	Drawing out issues and principles of gender-sensitive monitoring of project management and implementation	34
17	Alternatives for handling the GAD checklist for M&E	36
18	Tips on GAD indicators	37
19	What practice session C is all about	38
20	Tips on how to assess M&E workshop outputs	40
21	Sample outputs of practice session C, with comments	41
22	Preparing for the training or practice session	45
23	Tips for running practice sessions	45

CD-ROM materials

Power point presentations

Presentation 1 (Workshop design)

Presentation 2 (Background of the harmonized GAD guidelines)

Presentation 3a (Project design checklists)

Presentation 3b (Concepts and tools of gender analysis)

Presentation 4 (Key concepts in gender mainstreaming)

Presentation 5 (Project management, implementation and M&E)

Presentation 6 (Monitoring indicators)

Cases for practice session A

Multi-component agrarian reform project

Health sector reform

Sewerage

Rural micro-enterprise promotion

Practice session instructions

BACKGROUND

In the Philippines, projects are considered to have quality at entry for gender and development (GAD) when they conform to the standards of sensitivity to the gender dimension of the development problem they seek to address. In 2004, the National Economic and Development Authority (NEDA), the National Commission on the Role of Filipino Women (NCRFW), and the Official Development Assistance Gender and Development (ODA-GAD) Network together developed the *Harmonized Gender and Development Guidelines for Project Development, Implementation, Monitoring and Evaluation*. Launched by the President in 2005, the guidelines provide Philippine government agencies and ODA donors a common set of analytical concepts and tools to ensure that gender concerns are fully mainstreamed in the project cycle.

In 2006 and 2007, the NEDA Social Development Staff implemented the component on Improving Project Quality at Entry (Gender) as part of the technical assistance of the Asian Development Bank (ADB) to the Government of the Philippines for Harmonization and Managing for Results. To realize the overall goal of improving the gender-responsiveness of project proposals at the national and sub-national levels, NEDA organized a series of training of trainers and users of the guidelines in government agencies and other selected stakeholders. This training manual is based on the experiences from these training sessions.

PREPARATORY GENDER SENSITIVITY TRAINING SESSION

In many agencies or organizations, the training or mentoring session on the harmonized GAD guidelines has to be preceded by a GAD orientation-cum-gender sensitivity training (GST) session. This is because most planning, monitoring and evaluation (M&E), and other technical staff who need to be oriented on the guidelines have little or no background on the basic GAD concepts. Since the guidelines require gender analysis of the development problem and the project design, participants in the sessions on the guidelines should have an operational knowledge of the concepts and tools of gender analysis.

Depending on the objectives of the GAD orientation or GST, it can be designed to run for an hour, half a day, a day, or several days. For the purposes of the training or mentoring session on the harmonized guidelines, however, a one-day program can be effective (see box 1). The training team is advised to check on GST materials from the NCRFW (see list of materials at the end of this manual).

Box 1. Basic GAD orientation program

Session 1: GAD efforts at the agency (120 minutes)

- Lecture-discussion on the concepts and principles of gender mainstreaming
- Review of GAD efforts and results

Session 2: Basic gender concepts (120 minutes)

- Inputs and exercises on sex and gender, and other basic GAD concepts
- Inputs on characteristics of gender and manifestations of gender bias

Session 3: Gender issues in the sector (240 minutes)

- Presentation of statistics and research results on the GAD situation in the sector
- Short exercises to identify gender issues in the sector

THE WORKSHOP ON THE HARMONIZED GAD GUIDELINES

Objectives and Expected Results

A training session on the guidelines can be designed to produce two sets of capacities:

- Capacity to apply the guidelines in target agencies, which will help improve project quality and mainstream GAD concerns in development programs and projects; and
- Capacity to train other users through a formal training or mentoring activity.

Modules, Methodology, and Materials

Modules

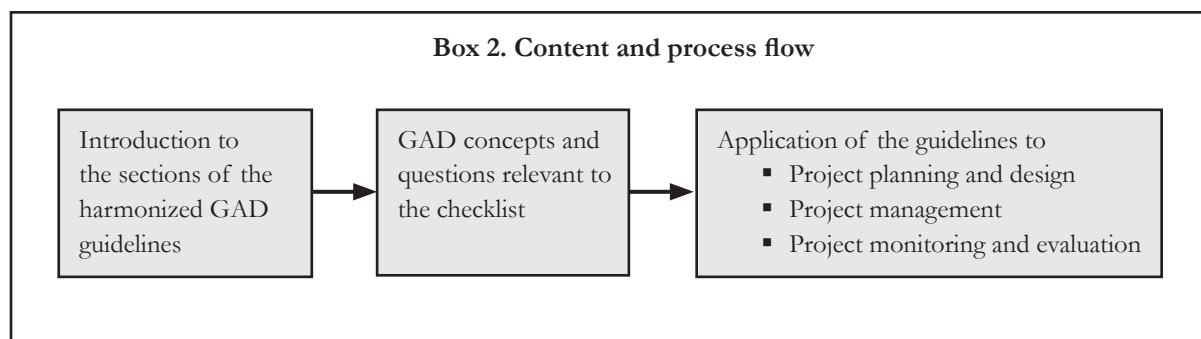
A full training program can run for two to three days. It can cover five modules, as follows:

- Introductory session, which includes welcome remarks, introductions of the training team and participants, presentation of the training objectives, and introduction to the GAD guidelines.
- Module 1, covering the GAD guidelines for project development and design
- Module 2, focusing on the GAD guidelines for project management and implementation
- Module 3, pertaining to the GAD guidelines for project monitoring and evaluation
- Module 4, focusing on planning re-entry activities, including organizing practice sessions

The training program, however, need not cover all five modules. The coverage can be more limited.

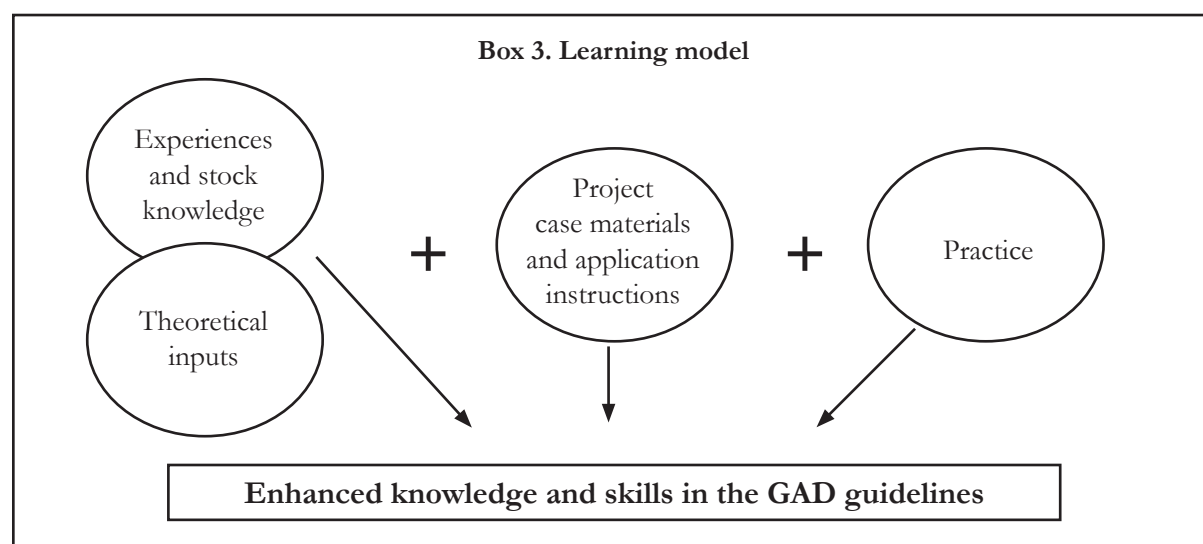
- For practice sessions that will be held in the agency, the most relevant modules are the introductory session and Modules 1 to 3.
- When working with project proposals, the training team can focus on the introductory session and Module 1.
- When working with ongoing projects and ascertaining the gender responsiveness of their project management, implementation, and monitoring and evaluation, the team can focus on the introductory session, and Modules 2 and 3.

Regardless of the objective of the training program, it will have to include an introduction of the participants to the guidelines, a discussion of GAD concepts and gender analysis questions that will help the participants apply the checklist, and a practice session. This flow is captured in box 2, below.



Methodology

The workshop is guided by an experiential learning model, such as that suggested by the results of the Training Needs Assessment (TNA) that NEDA conducted with agencies and potential workshop participants in 2006. The model values the participants' knowledge and skills and seeks to enhance these by providing theoretical inputs and offering as much hands-on practice as possible (see box 3). Designed as a training of mentors or trainers in development agencies, the workshop assumes that the participants have attended or participated in gender sensitivity sessions and are aware of the basic principles of GAD mainstreaming. Should this assumption not hold true, the workshop design should be revised to include a preparatory module that will equip the participants with basic gender concepts and issues in development and organizations.



The experiential learning model requires a methodology that puts together lecture-discussions, different structured learning exercises, and group critiquing. Specifically, the training or practice session will make use of the following strategies:

- Lecture-discussion
- Small discussion groups: dyads, buzz groups, working groups
- Fish-bowl exercise or role playing
- Report back in plenary sessions
- Peer critiquing

Materials

A workshop on the harmonized GAD guidelines can utilize three types of materials, as follows:

- The Harmonized Gender and Development Guidelines is the main reference material for the training. A copy of the revised guidelines is available from the guidelines section of the NEDA website, www.neda.gov.ph/references.asp. The revised version consists of several files, namely: the main text, including Box 7, which is the summary checklist, and the guide to the administration of the checklist in Appendix B; separate files for the sector-specific guidelines; and a separate file for the checklists

for project management, and monitoring and evaluation. Members of the training team can take turns presenting the relevant parts of the guidelines in Modules 1 to 3, using the presentations that are found in the CD-ROM that comes with this manual. These can also be downloaded from the NEDA website.

- The application sessions serve as the centerpiece of the workshop. The training team should prepare the application exercise cases or documents and the instructions that will guide the participants in applying the checklists and analyzing the results. Sample sets of instructions are provided in Modules 1 to 3 of the manual, and in the CD-ROM accompanying this manual.
- For sessions focusing on proposed projects, the application exercise can use either live project proposals or abbreviated version of proposals. The assessment of the actual proposal will produce the GAD rating for the proposed project and identify areas that can be improved, while the abbreviated version (“a project case”), being much shorter, will be useful as practice material. The choice of project document will depend on what the training team aims to accomplish during the training or mentoring session.

INTRODUCTORY MODULE

The training will start with the welcome remarks of the sponsoring organization. As evident in the session design in box 4, it will be followed by a two-part introductory session that will (1) allow participants to know each other, agree on some ground rules as well as share their expectations; and (2) provide an overview of the training and an introduction to the harmonized guidelines.

Box 4. Design of the introductory session

Welcome (maximum of 30 minutes)

- Heads of agencies that are sponsoring the workshop to give welcome remarks
- The head of the lead agency or her/his representative to provide a background of the workshop.
- A member of the training team to present a brief background of the development and application of the Harmonized Gender and Development Guidelines

Activity 1: Introductions by the participants and setting of ground rules (maximum of 30 minutes)

- Participants to form dyads or bigger groups and each participant to give her/his name, office, functions, and responsibilities that are relevant to the promotion or application of the guidelines
- Each group to also discuss the ground rules that they wish to be observed during the workshop

Activity 2: Expectations check (maximum of 30 minutes)

- Participants to form groups and discuss their expectations from the workshop with respect to content, process, and result
- Facilitator to organize or classify the responses

Activity 3: Presentation of the training design (maximum of 10 minutes)

- A member of the training team to present the training or practice session design

Activity 4: Introduction to the Harmonized Gender and Development Guidelines (maximum of 20 minutes)

- A member of the training team to go through the objectives and contents, context, features, and applications of the guidelines

Total time: 120 minutes

WELCOME REMARKS

The welcome session can involve one or two officials from the agency or agencies sponsoring or convening the training or mentoring activity (see Note to the Training Team, or simple, note, #1). In their welcome remarks, they should locate the activity in the ongoing drive of the Philippine government and the donor community to improve the quality of projects and programs at entry, and connect it to the harmonization objective of the 2005 Paris Declaration, and to the promotion of gender equality and women's empowerment. One of the speakers can also mention the series of training of trainers on the guidelines that NEDA organized from October 2006 to January 2007, and the roll out of the training at the agency and regional levels.

Note to the Training Team No. 1: Focus of the welcome address

The **welcome address or addresses** can cover the following points:

- The desire of the agencies involved in the activity to enhance the quality of proposed projects by ensuring that these address the gender issues or dimension of the development problems they seek to solve;
- The Philippine government commitment to gender equality and women's empowerment, as articulated in the Framework Plan for Women, and the agencies' gender and development (GAD) plans;
- A timeline of the development and dissemination of the Harmonized Gender and Development Guidelines; and
- The training or mentoring activity as part of a Philippine government initiative, with support from the Asian Development Bank, to disseminate and promote the application of the guidelines.

An agency official or a training team member will present the timeline of the development of the guidelines and the various efforts to promote its use by the Philippine government and the donor community (see note #2). The training team can refer to the handout for the timeline of the development of the guidelines.

Note to the Training Team No. 2: Mandates for the harmonized GAD guidelines

1. *Philippine laws or policies.* The guidelines respond to Republic Act (RA) No. 7192, or the Women in Development and Nation Building Act of 1989, which requires that "a substantial portion of official development assistance funds received from foreign governments and multilateral agencies and organizations shall be set aside and utilized by the agencies concerned to support programs and activities for women." The guidelines also support the implementation of the Philippine Plan for Gender-Responsive Development (PPGD) and the Framework Plan for Women (FPW).
2. *Donor GAD policies.* The guidelines are harmonized with the GAD policies of various multilateral and bilateral ODA donors.
3. *Endorsement by the Philippine Development Forum.* In line with the harmonization focus of the Paris Declaration of 2005, the Philippine Development Forum, a periodic gathering of officials of the Philippine government and ODA donors, has endorsed the use of the harmonized GAD guidelines by donors and the Philippine government.

ACTIVITY 1: INTRODUCTIONS AND SETTING OF GROUND RULES

Purpose	For participants to introduce themselves and discuss rules that they want respected or upheld during the training or mentoring activity
Timing	Maximum of 30 minutes (depending on the number of participants and how well they already know each other)
Process	Divide the participants into dyads (groups of two); instruct each person in the dyad to introduce herself/himself to the other (at least, name and nickname, office or agency, functions or areas of responsibility, and how the activity will affect the way s/he will discharge her/his duties in the future, and GAD training activities attended) and to describe what rules s/he wants to be observed during the training or mentoring activity; the dyad members will then take turns introducing each other to the bigger group.

After the round of introductions, the facilitator will ask each dyad/group what rules they want to be respected. The facilitator writes these on the board, and classifies and summarizes the responses. The usual rules are: (1) start and finish on time, (2) listen actively and do not engage in side conversations, and (3) switch off cell phones or at least keep the phones on silent mode. Note #3 helps the training team situate the ground rules in terms of rights of participants and trainers.

Note to the Training Team No. 3: Rights and rules

The training workshop on the harmonized GAD guidelines can only be effective if the participants respect each other's rights. Some of these key rights include:

- Equality: Everyone participates on an equal basis.
- Participation: Everyone participates as fully as possible; participants and trainers may revise any part of the program if it does not meet the participants' needs.
- Expression of views: Participants can say what they think and have their opinions respected by others.
- Leisure: Participants are entitled to breaks and free time in the evening.

ACTIVITY 2: EXPECTATIONS CHECK

Purpose	For participants to share their expectations of the training or mentoring activity
Timing	Maximum of 30 minutes
Materials	Meta cards, whiteboard, pen markers
Process	<p>Get the participants to discuss their expectations of the activity in small groups.</p> <ol style="list-style-type: none"> 1. Divide the participants into groups of four or per table (if seated in several tables). 2. Ask each group to discuss what it wants to gain from the training. 3. Give each group felt-tipped pens and meta cards (half of letter-sized heavy paper) on which to write their answers. Remind the participants to write no more than 3 to 6 words per card, and to use big, bold letters. 4. After 10 minutes of group work, ask one group to present its expectations. Then ask other groups whether they have the same or similar expectations from the workshop. Cards with similar expectations should be pinned together, while a different expectation should be pinned on a different column. The number of columns usually signify the number of expectations of the participants. See note #4 for tips on processing expectations.

Note to the Training Team No. 4: How to process expectations

While a group is sharing its expectations, the facilitator can collect and post the cards on the board. After all the groups have reported, the facilitator summarizes the key responses, pointing out:

1. Commonly expressed expected gains, which can be clustered into expected individual and collective gains (intellectual, social, and physical).
2. Rights come with responsibilities and obligations. By taking responsibility, participants are able to exercise their rights to participate fully.

ACTIVITY 3: PRESENTATION OF THE TRAINING OR SESSION DESIGN

Purpose	For participants to validate the design of the training or practice session
Timing	10 minutes
Materials	Presentation material either in electronic file (Word or PowerPoint), acetate, or Manila paper; computer and LCD projector, overhead projector (OHP), or board on which to pin the Manila papers
Process	A member of the training team will present the design that the team has prepared. The presentation will cover the following: (1) objectives of the workshop or practice session, (2) modules or main sessions and activities, and (3) planned flow of the training program. The training team can refer to the background section of this manual for guidance. <i>The team can also use presentation 1 in the CD-ROM that comes with this manual.</i>

ACTIVITY 4: INTRODUCTION TO THE HARMONIZED GAD GUIDELINES

Purpose	For participants to appreciate the objectives of the guidelines, its context in Philippine government policy and ODA community commitments, and its various applications
Timing	20 minutes
Materials	Presentation material either in electronic file (Word or PowerPoint), acetate, or Manila paper; computer and LCD projector, overhead projector, or board on which to pin the Manila papers
Process	A member of the training team will introduce the guidelines. The presentation will cover the following information: (1) objectives (see note #5); (2) contents, contexts and features, and the gender equality and women's empowerment framework; and (3) applications. <i>The presentation can be patterned after presentation 2 in the CD-ROM that comes with this manual.</i>

The presenter can entertain questions during or at the end of the presentation. Box 5, below, offers some frequently asked questions raised in previous sessions. Mastering the Harmonized Gender and Development Guidelines can help the training team answer the questions that participants might ask during the training or mentoring session.

Note to the Training Team No. 5: Objectives and contents of the harmonized GAD guidelines

The *objectives* of the harmonized guidelines are: (1) to provide ODA donors, NEDA and other Philippine government agencies, and development practitioners with a common set of analytical concepts and tools to integrate gender concerns into development programs and projects; and (2) to help achieve gender equality in and empower women through projects and programs.

The guidelines consist of three sets of checklists. The first set pertains to project or program development, from problem identification through design. This set includes generic checklists, such as the summary checklist (or box 7), in Part 1; and 11 sector-specific checklists, which constitute Part 2. The second and third sets are found in Part 3. The second (box 16) is a GAD checklist for project management, while the third (box 17) is relevant to monitoring and evaluation. Each checklist comes with a set of instructions on how to accomplish it.

The guidelines are useful to project or program planners and designers as well as to agencies that evaluate project proposals, as in the case of NEDA and ODA donors.

Box 5. Sample questions that can be raised during the session

Question: How does the harmonized GAD guidelines relate to guidelines for project development and/or project monitoring and evaluation currently used by agencies?

Possible answer: The development of the various checklists in the harmonized guidelines took into account existing checklists or guidelines used by the Philippine government and major donor agencies. NEDA project development manuals refer manual users to the harmonized GAD guidelines.



Question: Why should the agency use the guidelines?

Possible answer: The guidelines can help improve the quality of projects at entry. Moreover, most ODA donors and the Philippine President endorsed the guidelines during its launching in early 2005. In this connection, the NEDA Director General has issued several memoranda to government agencies to facilitate its application by these agencies.



Question: Why are the guidelines called “gender and development guidelines” when the focus is “women’s empowerment”?

Possible answer: The guidelines promote gender equality AND women’s empowerment, which is consistent with the Philippine GAD policy and the gender policies of many donor agencies operating in the Philippines.



Question: Can agencies revise the checklist to fit their needs better?

Possible answer: The checklists contain a specific number of elements, each of which has assigned scores. For instance, there are ten elements in the project design checklists (box 7 and the sector-specific checklists). These cannot be changed. What can be revised—either expanded or rephrased—are the questions that need to be answered under each element.



Question: The gender analysis at the project identification and project design phases seeks to identify gender issues that a project needs to address. What are the usual gender issues that emerge from a gender analysis of projects?

Possible answer: While there are “generic” or general types of gender issues (such as women’s multiple burden, invisibility of their contribution, subordinated status to men), the analysis should deal with specific gender issues that are relevant to the proposed project. The sector-specific checklists provide examples of gender issues that have been found to be pertinent to the sector.

Handout No. 1

Introduction to the Harmonized GAD Guidelines

WHY THE HARMONIZED GUIDELINES

- Proliferation of GAD guidelines
 - Different frameworks: women in development (WID), gender equity, gender equality, women’s empowerment
 - Different donor requirements
- Evolving policy environment for ODA
 - Philippine legislation related to GAD (RA7192, other Philippine laws on ODA)
 - Agreements and declarations of the Development Assistance Committee of the Organization for Economic Cooperation and Development (DAC/OECD)
 - Philippine Development Forum’s interest in ODA reporting vis-à-vis RA 7192
 - Policies of individual donors
- Need for simplification and coherence
 - OECD Paris Declaration of 2005, which enjoins donors to harmonize their processes and procedures with partner (recipient countries)
 - Joint efforts of NEDA, ODA GAD Network and NCRFW, which predate the Paris Declaration

STEPS TAKEN

1. Development of the guidelines (September 2003-February 2004)
 - Sponsors: initiated by the Canadian International Development Agency (CIDA) and the United Nations Development Fund for Women (UNIFEM) in the ODA GAD Network; funding by the United Nations Development Programme (UNDP)
 - Oversight by NEDA and the ODA GAD Network
 - Hiring of a consultant who reviewed the GAD guidelines and checklists used by donors and those used by the Philippine government, adopted the Philippine GAD framework as basis for harmonizing the guidelines, crafted the generic guidelines and a set of sector-specific guidelines (based on NEDA and the Network's selected sectors), and incorporated comments into the final version of the document
 2. Validation of the guidelines
 - Circulation of drafts of the guidelines among the NEDA regional offices (NROs) and ODA donors (November-December 2003)
 - Validation workshop involving ODA donors, NEDA, NCRFW, and key line agencies (February 2004)
 - Continuing validation during workshops on the guidelines (November 2004, June 2005, October 2005)
 3. Revision of the guidelines (October 2006 to November 2007)
 - Discussions in various training workshops of possible revisions to make the guidelines more user-friendly (June 2005 to January 2007)
 - Incorporation of suggested revisions (December 2006 to May 2007)
 - Testing of revised checklists (January 2007 to October 2007)
 4. Dissemination (beginning in January 2005)
 - Printing of the first 2000 copies, with funding from ADB
 - Uploading of the guidelines in the NEDA website; also uploaded in the NCRFW and donor websites (CIDA through the Philippines-Canada Cooperation Office [PCCO])
 - Orientation sessions by a few NROs and donors
 - Printing of additional copies for use in workshops by the World Bank and other donors
 - Printing of 2000 copies of the revised guidelines, again funded by ADB
 5. Capacity development (June 2005 to October 2007)
 - Orientation sessions: NEDA, ODA GAD Network, NRO, CIDA, various groups
 - Application workshops: NEDA; donors for their technical staff (International Labor Organization [ILO] and United Nations Children's Fund) and partners (ILO, World Bank)
 - Training of trainers: NEDA, NCRFW, other Philippine agencies
 6. Utilization
 - Preparation of project designs by proponent agencies
 - Preparation of project documents by donors
 - Assessment of proposals by NEDA technical staff
 - Assessment of proposals by donors
 - Monitoring by donors of the management and implementation of projects
 - Evaluation of project results
 7. Monitoring and evaluation
 - Implementing agencies
 - NEDA
 - Donors
 - Philippine Development Forum
-

MODULE ONE: GAD GUIDELINES FOR PROJECT DEVELOPMENT

The first module of the workshop proper focuses on Parts I and II of the Harmonized Gender and Development Guidelines. It has two major segments: the discussion of the relevant checklists, and the application of the checklists to project cases or documents. This set-up is reflected in the module design (see box 6).

Box 6. Design of module 1

Session 1: Presentation of the GAD checklists (150 minutes)

Activity 1: Discussion in plenary of the ten elements of a gender-responsive project or program design and how these are reflected in generic GAD checklists of the harmonized GAD guidelines (30 minutes)

Activity 2: Identification of gender issues (maximum of 90 minutes)

- Discussion of the concepts, uses and tools of gender analysis
- Buzz groups to identify gender issues using a short case
- Processing of group outputs in plenary

Activity 3: Presentation of a sample sector-specific checklist (maximum of 30 minutes)

Session 2: Application of the project development checklists on cases or project documents (210 minutes)

Activity 1: Workshop in small groups to work on project cases or documents (150 minutes)

Activity 2: Processing of workshop outputs in plenary (60 minutes)

Total time: Minimum of 360 minutes

OBJECTIVES

Module 1 is designed to introduce the participants to the GAD checklists and enable them to apply relevant checklists for problem identification and project planning and design. Specifically, the module aims to develop among the participants the following:

1. Knowledge in the requirements of a gender-responsive project design and the various GAD checklists that are applicable at the project development stage;
2. Appreciation of the importance of gender analysis and skills in identifying gender issues and designing strategies to address these issues; and
3. Skills in the application of the checklists to project cases or documents.

SESSION 1: PRESENTATION OF THE GAD CHECKLISTS

Purpose	This is intended to introduce the participants to the ten requirements of a gender-responsive project or program design, and to the generic and sector-specific project development GAD checklists.
Timing	Total of 150 minutes: (1) 30 minutes lecture-discussion on the generic checklists, (2) 90 minutes in gender analysis and identification of gender issues, and (3) 30 minutes discussion of the general content of sector-specific checklists and a more detailed presentation of a sample sector-specific checklist

ACTIVITY 1: PRESENTATION OF THE GENERIC GAD CHECKLISTS

Purpose	This activity aims to acquaint the participants with the general GAD checklists for problem identification and project design, and the summary generic GAD checklist for project development.
Timing	30 minutes
Materials	Presentation material in electronic file (Word or PowerPoint), computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers; and handouts.
Process	A member of the training team will introduce the guidelines for project development. The presentation will cover the following information: (1) the NEDA project development cycle, (2) the ten elements or requirements of a gender-responsive project or program (see box 7, below), (3) general gender analysis questions that will be elaborated in Activity 2 of Session 1, (4) generic GAD checklists for project identification and project design (handout 2) as well as the summary checklist for project proposal evaluation, (5) instructions for accomplishing the checklists, and (6) guide for interpreting the GAD score. <i>The resource person can use presentation 3a in the CD-ROM that comes with this manual.</i>

In discussing the ten elements in box 7, the resource person will stress that compliance with all these will mean that the project is gender-responsive. The degree of responsiveness of a proposed project will be determined using the relevant GAD checklist.

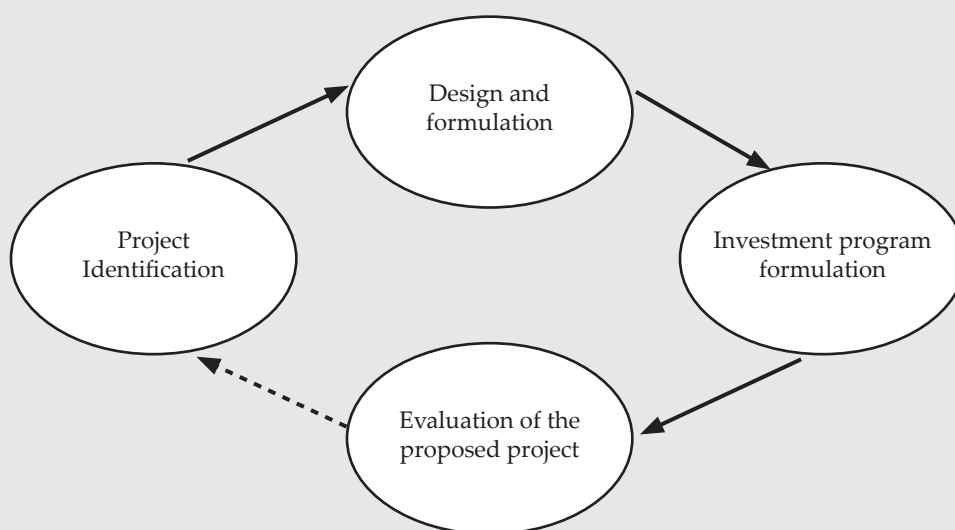
The resource person can entertain questions during or at the end of the presentation. Once again, mastering the harmonized GAD guidelines can help the training team answer the questions that participants might ask during the session.

When participants are not from NEDA, the training team may need to provide two inputs before discussing the guidelines. One input relates to the NEDA project cycle (see note #6); the other, to the logical framework analysis, also known as LFA or logframe (see handout 3). In discussing the latter, the training team should discuss the gender analysis questions that need to be asked at various points of the logframe (see handout 4).

In connection with the project development cycle, the training team should be ready to link the project cycle with the GAD requirements (see note #6) and provide examples of how the requirements can be met, citing concrete efforts of projects.

Note to the Training Team No. 6: Project cycle

The Training of Trainers participants who have rolled out the training workshop on the harmonized GAD guidelines in 2007 have found it necessary to insert a 30-minute session on the project development cycle. This means expanding the discussion of the second frame of presentation 3a in the CD-ROM that comes with this manual. The cycle can be portrayed as having four phases, as follows:



- Project identification includes generating information that reflects a high-priority in the use of the country's resources to achieve an important development objective. It is a process of searching for viable development initiatives aimed at responding to specific issues and problems. *At this phase, it is important to make sure that gender issues are identified and strategy options considered.*
- Project design and formulation involves planning and fleshing out the development initiatives that have been identified. *A gender-responsive design addresses gender issues that have emerged from a gender analysis of the development problem and an analysis of the planned project management, processes, outputs, and outcomes.*
- Investment plan formulation involves, among others, an analysis of investment gaps and size of programs and projects to address investment gaps and to achieve a given set of goals, and identify program subsector activities (PSAs). *It is critical at this stage that gender-responsive priority capital forming and technical assistance projects be included as provided by RA 7192. It is likewise crucial that assessment of the project using gender-responsiveness ratings be included in criteria for prioritizing projects.*
- Evaluation of a proposed project involves an analysis of its technical, financial, economic, social and operational viability. It likewise considers the potential impacts of the proposed project on the target area or beneficiaries. *There are two minimum GAD requirements for all projects: relevant gender issues have been identified, and the issues have been addressed in the project design.*

Box 7. Important elements of a gender-responsive project design

1. Participation of women and men in the identification of the development problem
2. Collection and use of sex-disaggregated data in the analysis of the development problem
3. Conduct of gender analysis to identify the gender issues that the proposed project must address
4. Goals, objectives, outcomes, and outputs include GAD statements that will address the gender issues in element #3
5. Activities that respond to the identified gender issues, including constraints to women's participation
6. Conduct of gender analysis of the planned project to anticipate gender-related issues arising from the implementation of the designed project
7. Monitoring indicators and targets which include reduction of gender gaps or improvement of women's participation
8. Project M&E system that includes a sex-disaggregated database
9. Resources and budgets for the activities in element #5
10. Planned coordination with NCRFW or the agency's GAD plans

Note: The first three requirements are related to the project identification stage, while the other seven are pertinent to the project design phase.

The discussion of the project development cycle can be followed immediately by a brief presentation of the project logical model. The “four by four” planning model of NEDA can be used as the basis for the presentation (see handout 3). As with the discussion of the project cycle, the resource person must link the logical framework discussion with the gender analysis questions that need to be asked to ensure that the framework considers gender-related constraints, issues, and possible effects of the proposed project. Handout 4 suggests key questions that can be asked as the logframe is being prepared.

Handout No. 2

Combined generic checklists for project identification and design

Element and item/question (col. 1)	Done? (col. 2)			Score for an item/ element* (col. 3)	Gender issues identified (col. 4)
	No (2a)	Partly (2b)	Yes (2c)		
1.0 <i>Involvement of women and men</i> (max score: 2; for each item, 1)					
1.1 Participation of women and men in beneficiary groups in identification of the problem (possible scores: 0, 0.5, 1.0)					
1.2 Participation of women and men in beneficiary groups in project design (possible scores: 0, 0.5, 1.0)					
2.0 <i>Collection of sex-disaggregated data and gender-related information</i> (possible scores: 0, 1.0, 2.0)					
3.0 <i>Conduct of gender analysis and identification of gender issues</i> (max score: 2; for each item, 1)					
3.1 Analysis of gender gaps and inequalities related to gender roles, perspectives and needs, or access to and control of resources (possible scores: 0, 0.5, 1.0)					
3.2 Analysis of constraints and opportunities related to women and men's participation in the project (possible scores: 0, 0.5, 1.0)					
4.0 <i>Gender equality goals, outcomes, and outputs</i> (possible scores: 0, 1.0, 2.0) Does the project have clearly-stated gender equality goals, objectives, outcomes or outputs?					
5.0 <i>Matching of strategies with gender issues</i> (possible scores: 0, 1.0, 2.0) Do the strategies and activities match the gender issues and gender equality goals identified?					
6.0 <i>Gender analysis of likely impacts of the project</i> (max score: 2; for each item or question, 0.67)					
6.1 Are women and girl children among the direct or indirect beneficiaries? (possible scores: 0, 0.33, 0.67)					
6.2 Has the project considered its long-term impact on women's socioeconomic status and empowerment? (possible scores: 0, 0.33, 0.67)					
6.3 Has the project included strategies for avoiding or minimizing negative impact on women's status and welfare? (possible scores: 0, 0.33, 0.67)					

Element and item/question (col. 1)	Done? (col. 2)			Score for an item/ element* (col. 3)	Gender issues identified (col. 4)
	No (2a)	Partly (2b)	Yes (2c)		
7.0 Monitoring targets and indicators (possible scores: 0, 1.0, 2.0) Does the project include gender equality targets and indicators to measure gender equality outputs and outcomes?					
8.0 Sex-disaggregated database requirement (possible scores: 0, 1.0, 2.0) Does the project M&E system require the collection of sex-disaggregated data?					
9.0 Resources (max score: 2; for each question, 1)					
9.1 Is the project's budget allotment sufficient for gender equality promotion or integration? OR, will the project tap counterpart funds from LGUs/ partners for its GAD efforts? (possible scores: 0, 0.5, 1.0)					
9.2 Does the project have the expertise in promoting gender equality and women's empowerment? OR, does the project commit itself to investing project staff time in building capacities within the project to integrate GAD or promote gender equality? (possible scores: 0, 0.5, 1.0)					
10.0 Relationship with the agency's GAD efforts (max score: 2; for each question or item, 0.67)					
10.1 Will the project build on or strengthen the agency/ NCRFW/government's commitment to the empowerment of women? (possible scores: 0, 0.33, 0.67) IF THE AGENCY HAS NO GAD PLAN: Will the project help in the formulation of the implementing agency's GAD plan?					
10.2 Will the project build on the initiatives or actions of other organizations in the area? (possible scores: 0, 0.33, 0.67)					
10.3 Does the project have an exit plan that will ensure the sustainability of GAD efforts and benefits? (possible scores: 0, 0.33, 0.67)					
TOTAL GAD SCORE FOR THE PROJECT DEVELOPMENT STAGE					

NOTE TO THE TRAINING TEAM: Handout 2 puts together boxes 5 and 6 in the harmonized GAD guidelines. This combined checklist is an expanded version of the summary checklist for the evaluation or assessment of a proposed project (box 7 in the harmonized GAD guidelines).

Handout No. 3

Logical framework analysis or project planning matrix

Narrative summary (NS)	Objectively verifiable indicators (OVI)	Means of verification (MOV)	Important assumptions
GOAL Developmental benefits of the project for target groups <i>What do they gain?</i>	Qualified/quantified parameters detailing the extent to which a project objective has been achieved within a given time frame and specified location	How to acquire evidence; where to find proof that will provide the data or information required for each indicator	Major conditions that are outside the direct control of the project, but are so important that they have to be met or have to hold true if the project is to achieve its objectives.
PURPOSE Changes in conditions achieved when target groups adopt or use project outputs <i>What do they do differently utilizing the project outputs?</i>	How the target groups' utilization of the goods and services will affect their activities, practices or behavior		
OUTPUTS Describes the goods and services that the project will produce (deliverables) <i>What does the project provide?</i>	Which goods and services a project intends to make available		
ACTIVITIES Measures or tasks carried out by the project to produce the outputs (actions) <i>What does the project do?</i>	INPUTS Resources needed to implement the activities <i>Together with the activities, inputs are necessary for coming up with the Plan of Operations, that is the Work Financial Plan (or WFP)</i>		Preconditions —necessary to start the implementation of project activities

Source: PowerPoint presentation during the Echo Training on the Harmonized Gender and Development Guidelines for Region VI, held in Iloilo City on 24-26 October 2007.

Handout No. 4

Suggested key questions in engendering the logical framework analysis*

Narrative summary	Objectively verifiable indicators	Means of verification	Important assumptions or risk factors
Overall Objective or Long-term Goal <ul style="list-style-type: none"> Are women or girls specified as among the clients, targets or beneficiaries who will <i>gain</i> in terms of improved status or material condition (life outcome) or enhanced participation in the long-term benefits of the project? OR <ul style="list-style-type: none"> Do gender relations in any way influence the project goal, including the distribution of benefits? 	What measures can verify the achievement of the gender-conscious goal within a given time frame and specific location?	<ul style="list-style-type: none"> Are the data for verifying the goal classified by sex and analyzed in terms of gender? What gender analysis tools will be used? 	What are the important external factors necessary in sustaining the gender-conscious goal?
Project Purpose (or Specific Objectives or Outcomes) <ul style="list-style-type: none"> Does the project have gender-responsive objectives? Does the project enable women and men, girls and boys, to utilize their enhanced capacities or the resources they received from the project? 	<ul style="list-style-type: none"> What measures can verify the achievement of the gender-responsive objectives or of objectives in connection with women and men, girls and boys? OR <ul style="list-style-type: none"> How will the utilization of the goods and services by women and men, girls and boys, affect their activities, practices, and behavior? 	<ul style="list-style-type: none"> Are the data for verifying the project purpose sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used? 	What are the important external factors necessary for sustaining the gender-responsive objective(s)?
Outputs <ul style="list-style-type: none"> Is the distribution of goods and services equally or equitably accessible to women and men, girls and boys? Do the project deliverables address gender issues that are directly relevant to the project? 	What measures can verify that project deliverables (enhanced capacities, health services, etc.) are accessible to women as well as men, girls as well as boys, and different types of women/girls?	<ul style="list-style-type: none"> Are the data for verifying project outputs classified by sex and analyzed in terms of gender? What gender analysis tools will be used? 	What are the important external factors necessary in achieving project outputs, particularly in connection with marginalized women?
Activities <ul style="list-style-type: none"> Are gender issues clarified in the implementation of the project? Are project activities designed to enable women and men, girls and boys to participate in the activities or share in the benefits? Do the project activities build the capacity of the staff to conduct gender analysis and monitor or review project progress vis-à-vis gender concerns or issues? 	Inputs: <ul style="list-style-type: none"> What resources do project beneficiaries contribute to the project? Is the contribution of women as well as men accounted for? Do external resources account for women's access to and control over resources? Has the project allocated a budget for building the capacity of the project staff to implement the project in a gender-responsive way? 	<ul style="list-style-type: none"> Are the data for verifying project activities sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used? 	What are the important external factors necessary in achieving the activities and especially ensuring the continued involvement of man and woman participants in the project?

*The questions are enhanced versions of the questions used by the International Service for National Agricultural Research (ISNAR); the questions have been aligned with the NEDA logical framework analysis methodology.

Source: *Harmonized Gender and Development Guidelines for Project Development, Implementation, Monitoring and Evaluation*. Second edition. Manila: National Economic and Development Authority, National Commission on the Role of Filipino Women, and the ODA GAD Network. 2007.

SESSION 1: PRESENTATION OF THE GAD CHECKLISTS

ACTIVITY 2: IDENTIFICATION OF GENDER ISSUES AND MATCHING ISSUES WITH STRATEGIES

Purpose	This activity aims to develop basic skills in gender analysis leading to the identification of gender issues and strategies to address these issues.
Timing	90 minutes
Materials	Presentation material in electronic file, computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers; and handouts, including the hard copy of PowerPoint presentation 3b in the CD-ROM..
Process	<p>This activity consists of three sub-activities.</p> <ol style="list-style-type: none">1. A training team member will provide inputs on basic gender analysis concepts, and the gender equality and women's empowerment framework (GEWEEF). However, this can be preceded by a buzz group (see note #7). Discussions can focus on gender analysis, gender vs. sex, gender roles and needs, access to resources, control over resources, and constraints and opportunities offered by culture, faith, economics, politics, geographic location, and the like (see handout 5). <i>The resource person can use PowerPoint presentation 3b in the CD-ROM.</i>2. A facilitator will divide the participants into groups of four, according to their seating arrangement. Each group will be a “buzz group” that will analyze a case (the Bulolakaw case, see handout 6, or a similar case), following a set of questions. Note #8 provides tips for running the buzz group.3. After 30 minutes, the facilitator will instruct the groups to share the result of their analysis. Note #9 offers one possible way of processing the buzz group results.

Note to the Training Team No. 7: Discussion on the basic concepts and tools of gender analysis

Prior to the lecture or presentation, the assigned resource person can evoke the participants' notions of gender analysis and use their responses as a springboard for the discussion of the conceptual building blocks of gender analysis. The facilitator can do the following:

1. Ask the participants to form “buzz groups,” or small groups of 3 to 4 people seated close to each other.
2. Instruct each group to answer two questions: What do you understand by the term ‘gender analysis’? What key words do you associate with it?
3. Instruct the group to write down the key words in meta cards, one idea per card.
4. Call on the groups to post their meta cards on the board, and briefly explain their meta card entries. To save on time during the plenary presentations, advise the groups not to repeat what other groups have already presented.
5. In preparation for the lecture-discussion, cluster the responses into various categories, such as gender roles or gender division of labor, gender relations, access to resources, control over resources, and gender-based constraints and opportunities.

Handout No. 5

Basic gender analysis concepts

Access and control: Being able to avail oneself of, or to utilize, a particular resource (*access*); the power or authority to decide on the acquisition, use, allocation and disposal, or a resource or benefit (*control*)

Benefits: Income, food, social status, and other results of human activities and development effort.

Gender: A shortcut of the phrase, “social relations of gender,” which seeks to make evident and to explain the global asymmetry that appears in male-female relations in terms of power sharing, decision making, division of labor, and return to labor both within the household and in society. It directs our attention to all the attributes acquired in the process of socialization: notions of self, group definitions, sense of appropriate roles, values and behaviors, and expected interactions in relationships between women and men. In the Philippines, as in most societies, women as a group have less access to resources, opportunities and decision-making. These asymmetries and inequalities limit their ability to develop and exercise their full capabilities for their own benefit and for the benefit of society as a whole.

Gender analysis: An examination of a problem or situation in order to identify gender issues within the problem/context of a project, and the obstacles to the attainment of gender equality or similar goals. Gender issues may be addressed in all aspects of the program, project, or organization. This commitment is reflected in the incorporation of GAD goals as well as in the choice of intervention strategy.

Gender discrimination: Differential treatment given to individuals on the basis of their gender. This generally involves systemic and structural bias against women in the distribution of income, access to resources, and participation in decision making.

Gender issue: Arises when gender inequality is recognized as undesirable or unjust.

Gender needs and interests: May be classified into practical and strategic, in the context of women’s empowerment.

- *Practical gender needs:* Those that do not challenge the unequal structure of gender relations, division of labor or traditional balance of power, but relate to the sphere in which women have primary responsibilities. These differ from “women’s special needs” but may sometimes arise from them. Some examples are need for income to send children to school, weeding tools for agricultural work, and potable water.
- *Strategic gender interests.* Those that arise out of an understanding (consciousness) and analysis of women’s subordinate situation in society. These are the actions and strategies required to bring about structural changes and empowerment. Examples include political and legislative reform to grant constitutional equality to women, state accession to the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), a political voice, and action on violence against women.

Gender roles: Those roles a society or culture defines or constructs as female or male. An example is childrearing, which is classified as a female gender role. It is not a female sex role, as childrearing can be done by men as well as by women. Gender roles may be generally classified into:

- *Production,* which consists of activities that result in the generation or production of marketable

goods or services. These include, among others, producing crops, fisheries, animal raising, and wage employment.

- *Reproduction*, which covers activities carried out to reproduce labor, and to care for and maintain the household. Examples include childcare, food preparation, and other activities that generate goods and services for immediate household consumption.
- *Community management*, which pertains to roles or activities that produce results for the community's collective consumption, use, or benefit. Examples are mobilizing resources to secure basic services for the community, taking on leadership roles, and participating in projects and organizations.
- *Leisure*, which refers to activities that do not pertain to productive or reproductive work but are instead related to rest and recreation.

Resources: Anything that people need to carry out their activities. More specifically, it may be understood as anything that produces a stream of income and other benefits.

Sex roles: Occupation or biological function for which a necessary qualification is to belong to one particular sex category. An example is pregnancy as a female sex role, as only members of the female sex may bear children.

Levels of gender equality and women's empowerment

WELFARE: Addressing the material and physical well-being of women and men, girls and boys. Empowerment here refers to improvement in the physical condition of women and girls.

ACCESS: Ensuring that resources, services, and facilities are made available to women and men. Access is related to the concept of entitlements that are conferred by the state, market, kinship, and other systems. Because women's entitlements are generally more limited, empowerment here means greater access of women to resources, services, and facilities, and making available to women appropriate and effective means to secure resources, services, and facilities.

CONSCIENTIZATION: Challenging the existing gender division of labor or questioning the beliefs that women's lower socioeconomic position and the traditional gender division of labor are part of the *natural order*, or is "*God-given*"; and acknowledging the equality between women and men. Empowerment means sensitizing women and men to sexist beliefs and recognizing that women's subordination is not part of the natural order of things, but is imposed by a system of discrimination that is socially constructed, one that can be altered.

PARTICIPATION: Addressing the most visible and obvious phenomenon of inequality between women and men—small proportions of women are found in the legislative assembly or in the management of public organizations and the private sector. When development is confined to the levels of welfare and access, women are treated as passive beneficiaries. Empowering women means making them equal with men, who are agents actively involved in the development process.

CONTROL: Confronting the unequal power relations between women and men. Women's increased participation at the decision-making level will lead to their increased development and empowerment when this participation is used to achieve increased control over the factors of production, ensuring women's equal access to resources and the distribution of benefits. Equality of control means a balance of power between women and men, so that neither is in a position of dominance.

Source: Appendix A, *Harmonized Gender and Development Guidelines for Project Development, Implementation, Monitoring and Evaluation*. Second edition. Manila: National Economic and Development Authority, National Commission on the Role of Filipino Women, and the ODA GAD Network. 2007.

Note to the Training Team No. 8: How to run a gender analysis session through buzz groups

Organize the participants into buzz groups, and provide the participants with a copy of the case (see handout 6) and the buzz group instructions, as follows:

1. Discuss the one-page case with the people seated around your table. Specifically,
 - a. What do you think were the assumptions of the project regarding the lives of women and men in the village? What gender issues do these assumptions reflect?
 - b. Because of these assumptions, what strategies did the project use?
 - c. What gender issues were created by the way the project was designed or implemented?
 - d. What could the project have done to address the gender issues you have identified?
2. Organize your analysis according to the level of gender equality and women's empowerment:

Level	Gender issues	Project strategies	Gender issues arising from project design or implementation
Control			
Participation			
Conscientization			
Access			
Welfare			

As the facilitator, process the group results and proceed with the lecture, summarizing the buzz group results in terms of (1) links between notions or assumptions and project action; (2) consequences of not conducting a gender analysis before designing the project, and (3) gender issues and gaps and how these are created (see note #4 for a sample result of the analysis of the Bulolakaw case).

Handout No.6

The Bulolakaw case

Adapted from Rivas, Rene M., Cecile C. Uy, and Salve B. Borlagdan, "Women and men in an upland project: The Bulolakaw case," in *Gender Analysis and Planning: The 1990 IPC-CIDA Workshops*, edited by Jeanne Frances I. Illo Quezon City: Institute of Philippine Culture, Ateneo de Manila University. 1990.

Bulolakaw lies within a 3,968-hectare timberland area with elevations ranging from 600 to 800 meters. Although the village is located on public land (that is, not alienable and disposable), about 69 percent of the area is occupied by farming households whose claims to land rest on their payment of land taxes. Its residents are migrants from the lowlands of the Province of Cebu.

The upland farms have been cleared and are being cultivated by whole households. The women have always been active in farming activities, but the farms have been associated with the male whose names appear in the tax payment papers. Many of the couples are not married and, under Philippine law, the women have very little claim to property acquired during cohabitation.

In mid-1980s, the government launched an integrated social forestry project in the village. In this connection, government workers organized a farmers' association, distributed certificates of stewardship contracts (CSC), and trained farmers on different upland development technologies. In all these, including the delivery of farm security, the workers involved men. Hence, men accounted for more than 9 of 10 association members, CSC holders, and trainees.

The village, however, has other pressing concerns, such as potable drinking water, livelihood, and medical services. To address these, the government workers organized the women into an association and linked them with relevant government agencies.

Note to the Training Team No. 9: Sample results of the gender analysis of the Bulolakaw case

Level	Gender issues	Project strategies	Gender issues resulting or arising from the strategy
Control	<ul style="list-style-type: none"> • Women have little claim to property <ul style="list-style-type: none"> ◦ Women do not have control over the land because they are not the owners (that is, the tax payment paper is in the male partner's name) ◦ Men are the only recognized "owners" of the land 	Distribution of Certificate of Stewardship Contracts (CSC) to farmers' association members who are mostly men	The project's CSC distribution scheme reinforces gender inequality in land distribution
Participation	<ul style="list-style-type: none"> • Women are expected to involve themselves in social projects, while men join farmers' associations 	<ul style="list-style-type: none"> • Organizing the (male) farmers into a farmers' association, and the women into the water association 	<ul style="list-style-type: none"> • Organizing strategy reinforces gender role stereotypes that are not borne out by actual division of labor
Conscientization	<ul style="list-style-type: none"> • Invisibility of women's contribution to production because of the persistent notion of farmers as male, or of farming as largely a male concern although women are also active in land clearing and cultivation • Women are associated with managing community response to basic needs; men are not expected to worry over social concerns • Unequal control over property with men assumed as having dominant claim 	<ul style="list-style-type: none"> • Linking participation in social forestry training with membership in the farmers' group • Linking access to technology and other resources with membership in farmers' association 	<ul style="list-style-type: none"> • Limited opportunities for women to participate in social forestry project activities—reinforces unequal access to farming technologies, trainings and other project benefits • Gender tracking of delivery of training inputs
Access	<ul style="list-style-type: none"> • Relatively more training opportunities for men than for women 		
Welfare	<ul style="list-style-type: none"> • Women are assumed to be responsible for addressing welfare issues (water, health, livelihood) in the community • Inequitable distribution of responsibilities between women and men, as women are involved in both production (farming) and household management 		

Sources: Various Training of Trainers sessions on the harmonized GAD guidelines, 2006-2007

SESSION 1: PRESENTATION OF THE GAD CHECKLISTS

ACTIVITY 3: PRESENTATION OF SECTOR-SPECIFIC CHECKLISTS

Purpose	This activity aims to familiarize the participants with Part II of the harmonized GAD guidelines.
Timing	30 minutes
Materials	Presentation material in electronic file, computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers
Process	<p>This activity is a continuation of Activity 1, Session 1. For Activity 3, the resource person will undertake the following:</p> <ol style="list-style-type: none">1. Resume the presentation of the harmonized GAD guidelines, but this time focusing on Part II, or the sector-specific checklists. <i>As in Activity 1, the resource person can use PowerPoint presentation 3b in the CD-ROM.</i>2. Present the main sections of a sector-specific checklist: (a) the gender issues in the sector, (b) sample gender equality results or outcomes, (c) gender analysis questions, (d) guide for accomplishing the checklist, (e) the checklist itself, and (f) interpretation of the total GAD score.3. Go through a selected sector-specific checklist, pointing out the sections or areas that the checklist has in common with the generic and other sector checklists, and where it departs from them.4. Entertain questions during or after the presentation. Because a practice or application session will immediately follow the presentation, the discussions must focus on clarifying points and preparing the participants for the practice session.

SESSION 2: APPLICATION OF THE CHECKLISTS (PRACTICE SESSION A)

ACTIVITY 1: WORKSHOPS OR SMALL GROUP DISCUSSIONS

Purpose	This activity aims to develop the capacity of participants for applying the appropriate GAD checklist to a project case or document
Timing	150 minutes
Materials	Hard copy of case material or project document (see sample cases in the CD-ROM); workshop instructions (see handout 7); checklist templates; Manila paper, felt-tipped pens, and board on which to pin the Manila papers; or computer and LCD projector; or acetate, pens, and overhead projector
Process	A member of the training team will explain the objective and mechanics of the practice session, carefully going through the workshop instructions and guide questions, and informing the participants how long they have for the workshop. The participants will then break into groups, and proceed to their assigned venue with their facilitator. Each participant will be given a copy of the instructions and the material (case or project document) that will be used. The team must maximize the learning opportunities for the participants by carefully matching participants and case assignment (see note #10).

Note to the Training Team No. 10: Preparing for practice session A

- The practice session can be made most useful and relevant to the participants by putting them in a group that will discuss case materials or project documents in a sector or area that fits their expertise or usual work assignment. This will require having a profile of the participants prior to the training, and preparing the group assignments before the practice session begins.
- During the pre-session meetings, the training team members must agree on who will facilitate what group, read the relevant project case or document, and try to answer the guide questions. This will help them understand the case and the practice session better.

In the workshop group, the team member-facilitator will urge their group to read the case carefully, keep their discussions to the facts or information in the case, and cover all the questions and points in the workshop instructions. Note #11 provides a set of reminders to the practice session facilitators.

Handout No. 7

Practice session A workshop instructions

Focus of the small group sessions: assessment of the gender sensitivity/responsiveness of a project and enhancement of the project design to make the project more gender-responsive or produce better gender equality results

1. Allot a maximum of 45 minutes for reading or reviewing the project document.
 2. Use the assigned harmonized GAD checklist. Go through each element, item and question of the checklist. **Rate the project document.** Although the checklist is intended to be used while a project is being identified and designed, it can also be applied, as will be done during the workshop, as an assessment guide. The object of this exercise is to determine whether or not the project—as can be discerned from the document—has gone through the required activities (involving women and men in the design, generating and using sex-disaggregated data, conducting gender analysis, etc.).
 3. Analyze the project case or document further by discussing the following questions:
 - a. What salient gender gaps or issues should the project consider? Have these been identified in the discussion of the development problem or issue? Have the gender issues been discussed elsewhere in the case or document?
 - b. What are the strategies (or ways) of addressing the issues that have been identified in the project case or document?
 - c. What gender issues do you anticipate as a result of the way the project has been designed? Why?
 4. How would you improve or enhance the project design to help the project produce better gender equality or women's empowerment results? Do this by addressing each of the elements in the checklist where your group has found the project design wanting. Particularly, identify
 - a. what additional activities should be undertaken
 - b. what additional information are needed to better define the gender dimension of the development problem or issue, or to better identify the gender issues that the project should address
 - c. what changes need to be introduced in the project strategies or interventions to better respond to the gender issues, **especially the issues arising from the project design**
 - d. what changes need to be introduced in the project monitoring plan (including monitoring indicators)
 - e. what additional resources may be needed and why
-

Note to the Training Team No. 11: Managing the workshop group

1. If the group is using a training case, emphasize that the “case” has been prepared principally as a training material, and, hence, is not the complete document. Discussions will have to be limited to the information provided by the case.
2. Allow the participants 45 minutes to read the case.
3. Instruct the group to choose a member who will present the group output during the plenary session. Inform the group that its presentation to the plenary must not exceed 10 minutes.
4. Ask the group to apply the assigned checklist to the case, going through each element, item and question of the GAD checklist. Explain that the harmonized GAD guidelines can be used while a project is being identified and designed, or as an assessment guide. In some instances, the full checklist cannot be applied to a project case.
5. Instruct the group to rate the project case or document, using the guide for accomplishing the checklist; compute the total GAD score for the proposed project; and interpret this score.
6. Lead the group through the workshop instructions (handout 7) and encourage the group to discuss all the questions, which will guide the participants to an analysis of the case.

Normally, a facilitator is not a member of the group, and should, therefore, not be involved in the analysis of the case. However, in the practice session, particularly when it is for the facilitator’s own agency, the facilitator is expected to also act as a mentor, explaining elements and questions of the checklist when necessary, and commenting on the group’s application of the checklist to the case material or project document.

SESSION 3: APPLICATION OF THE CHECKLISTS (PRACTICE SESSION A)

ACTIVITY 2: REPORTING AND PROCESSING OF WORKSHOP RESULTS

Purpose	This activity aims to help participants learn from what other groups have accomplished and to draw lessons from the way groups have used the checklist
Timing	60 minutes
Materials	Board on which to pin the Manila papers, computer and LCD projector, and/or overhead projector
Process	<p>The participants will go back to the main training venue. A member of the training team will moderate the plenary session, instructing the groups to keep their report to 10 minutes. After each presentation, the moderator shall invite questions and comments from the other groups as well as the training team. The moderator will close the discussion of a case by summarizing the major points that were raised during the discussion of the case. Note #12 offers some tips for processing the workshop outputs.</p> <p>Before ending Module 1, the training team will remind the participants about what materials to read for the next module.</p>

Note to the Training Team No. 12: Commenting on workshop group outputs

1. Following a mentoring mode, the training team can pay attention to the following:
 - a. Correctness of the use of the checklist by a group
 - b. Completeness and correctness of the group's analysis of the gender issues relevant to the proposed project
 - c. Adeptness of the group in analyzing the planned strategies vis-à-vis the identified issues and in identifying gender issues arising from the way the proposed project has been designed
 - d. Exclusion of key activities in the group's assessment of what else the proponent has to do to enhance the responsiveness of the project to gender issues
2. Point out that voting on what the score should be for an item, question or element does not make the score right. Emphasize the basis for scoring particularly for a "partly yes" and a full "yes." Refer the participants to the guide for accomplishing a checklist.
3. If necessary, add gender issues to those identified by the group. Explain how important the issues are to the attainment by the proposed project of its stated purposes or objectives, and outcome and output-level results. Show this by laying out the logic model of the proposed project, and how a correct identification of gender issues affects the selection of strategies that can lead to the achievement of promised results.

MODULE TWO: GAD GUIDELINES FOR PROJECT MANAGEMENT AND IMPLEMENTATION

The second module of the workshop proper focuses on the first section of Part III of the Harmonized Gender and Development Guidelines. As in Module One, this module has two major segments: the discussion of the relevant checklist, and application of the checklist to project cases or documents (see box 8).

Box 8. Design of module 2

Session 1: Presentation of the GAD checklist (60 minutes)

Activity 1: Discussion of key concepts and principles of GAD mainstreaming (30 minutes)

Activity 2: Presentation of the GAD checklist for project management and implementation (30 minutes)

Session 2: Application of the project management checklist (120 minutes)

Activity 1: Preparation for and staging of 10-15 minute skits (90 minutes)

Activity 2: Processing of observations in plenary (30 minutes)

Total time: Minimum of 180 minute

OBJECTIVES

Module 2 seeks to introduce the participants and enable them to apply the GAD checklist for project management and implementation. Specifically, the module aims to develop among the participants the following:

1. Knowledge in the requirements of a gender-responsive project management and implementation;
2. Appreciation of the link between GAD mainstreaming and gender-responsive project management and implementation; and
3. Skills in the application of the checklist to a project case.

SESSION 1: PRESENTATION OF THE GAD CHECKLIST

Purpose	This is intended to introduce the participants to the GAD checklist for project management and implementation, and the main concepts of GAD mainstreaming.
Timing	Total of 60 minutes: (1) 30 minutes lecture-discussion on GAD mainstreaming, and (2) 30 minutes presentation of the GAD checklist for project management and implementation

ACTIVITY 1: INTRODUCTION TO GAD MAINSTREAMING

Purpose	This activity aims to acquaint the participants with the key concepts and principles of GAD mainstreaming.
Timing	30 minutes
Materials	Presentation material in electronic file (Word or PowerPoint), computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers; and handouts.
Process	A member of the training team will discuss the concept, entry points and stages of GAD mainstreaming, gender issues in organization (see box 9), and possible gains from a gender-responsive organization. <i>The resource person can use presentation 4 in the CD-ROM that comes with this manual.</i> The training team can refer to NCRFW materials on gender mainstreaming (see patrial list at the end of the manual) to prepare for this activity.

Box 9. Sample gender issues in organizations

- Low participation of women in decision-making positions
- Gender tracking in work assignments
- Multiple work burden of women often not considered in organizations
- Violence against women in the form of sexual harassment and other gender-based abuses

Alternatively, the input can be preceded by asking the participants what they know about GAD mainstreaming, and then refer to these points as the resource person goes about the presentation. The resource person can entertain questions during or at the end of the presentation.

Note that the GAD mainstreaming input may also be given at the beginning of the workshop (as shown in box 1; see also note #13). When this happens, the input on GAD mainstreaming in Session 2 must be directly linked to the GAD checklist for project management.

Note to the Training Team No. 13: Scheduling of GAD mainstreaming inputs

The discussion of GAD mainstreaming may be part of Session 2, or it may also occur at the introductory session, as observed during the “re-echo” sessions at the Department of Health and the Department of Environment and Natural Resources. The latter seems to work when the training or practice sessions are conducted exclusively for one agency or department, and participants can appreciate the fact that applying the harmonized GAD guidelines can help mainstream GAD in the programs, projects and activities of their agency.

SESSION 1: PRESENTATION OF THE GAD CHECKLIST

ACTIVITY 2: INTRODUCTION TO THE GAD CHECKLIST

Purpose	This activity aims to acquaint the participants with the key concerns and elements of the GAD checklist for project management and implementation.
Timing	30 minutes
Materials	Presentation material in electronic file (Word or PowerPoint), computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers; and handouts.
Process	<p>A member of the training team will introduce the guideline for project management and implementation. The presentation will cover the two sets of concerns highlighted in the guidelines: (1) GAD concerns, including support of leadership, commitment to promote GAD and technical competence in GAD by the project management office (PMO) or the implementing group, willingness to tap external GAD expertise to develop capacity within the PMO, and enforcement of procedures and processes that promote women's participation in project activities; and (2) issues of agency participation. The discussion of the guidelines will end with the presentation of the relevant GAD checklist, which is box 16 in the revised harmonized GAD guidelines. <i>The resource person can use the first part of PowerPoint presentation 5 in the CD-ROM that comes with this manual. The second part of presentation 5 is on the checklist for monitoring and evaluation (M&E).</i></p>

The resource person will stress that the maximum GAD score for project management is “8”. Combined with the GAD score for monitoring the evaluation, the maximum GAD score for project implementation, and monitoring and evaluation will be “20”.

The resource person can choose to entertain questions during or at the end of the presentation. Once again, mastering the Harmonized Gender and Development Guidelines can help the training team answer the questions that participants might ask during the training or mentoring session.

SESSION 2: APPLICATION OF THE CHECKLIST (PRACTICE SESSION B)

ACTIVITY 1: PLAYING OUT THE MONITORING OF PROJECT MANAGEMENT AND IMPLEMENTATION

Purpose This activity aims to develop the capacity of participants for applying the GAD checklist for project management and implementation

Timing 90 minutes

Materials Hard copy of the outputs of practice session A, and colored papers, pens, tapes

Process This activity consists of two parts: (1) the preparation by the groups of a 10-15 minute skit portraying a monitoring visit by a representative of the project's donor agency, and (2) the staging of the skit.

A member of the training team will explain the objective and mechanics of the practice session (see handout 8), carefully go through the workshop instructions and guide questions, and inform the participants of the time allotted for the preparation and the actual presentation. The participants will then break into groups and will reconvene after the allotted time to take turns performing.

The training team will instruct the participants that while one group is presenting, the other groups must observe and glean important lessons from the way the monitoring is staged. Note #14 provides tips on how to handle practice session B.

Handout No. 8

Practice session B: Fish-bowl or role-play instructions

1. Use the same grouping and project case assignments as in practice session A.
 2. Each group will ascertain the gender-sensitivity and responsiveness of the implementation and monitoring of the project through a simulation (role-playing) exercise. The group will interview key project/subproject players and examine available project documents.
 3. The group will divide the roles among its members, identifying who will assume the role of project managers or implementers and who the monitors.
 4. The group will use the checklist in box 16 in the revised harmonized GAD guidelines to determine how gender-sensitive or responsive project implementation has been so far.
-

Note to the Training Team No. 14: Handling practice session B

1. *Preparatory activities.* Give the groups 30 minutes to prepare for their 15-minute presentation or skit. The scenario which all groups will act out will be a monitoring visit of a donor to a project to assess the gender responsiveness of the management and implementation of the project.
2. *Fish-bowl exercise or presentation of the skits.* After 30 minutes, reconvene the participants for the group performances. The team can allocate 60 minutes for the plenary session, or a maximum of 15 minutes for each group.
3. *Structuring observations.* While a group is performing, the other groups will take note of effective ways of using the GAD checklist for monitoring and assessing the gender responsiveness of project management, as well as specific questions that can be raised to pursue gender issues during monitoring of projects.

SESSION 2: APPLICATION OF THE CHECKLIST (PRACTICE SESSION B)

ACTIVITY 2: PROCESSING OF THE ROLE-PLAY EXPERIENCES

Purpose	This activity aims to develop the participants' skill in drawing out principles and lessons from different types of training exercises, particularly role playing.
Timing	30 minutes
Materials	Computer and LCD projector; or acetate and overhead projector; whiteboard and markers, or Manila paper and easel board
Process	A training team member will facilitate the discussion of the participants' observations of the skits. The facilitator will summarize the points (see note #15) and together with other members of the training team, extract principles of good GAD monitoring of project management and implementation (see note #16).

Note to the Training Team No. 15: Sample summary of discussions of observations

- Discussions were dominated by the people/groups who were “empowered” or in power; real-life portrayal, including the women’s group representatives serving coffee (GAD project goals not carried through at the level of practice)
- Realistic or relevant questions or issues: Are they related to the project or to expectations from the project at the time of the monitoring visit?

-- *Not asked:* impact of the livelihood projects on the status of women, women’s autonomy or independence on the control of income. *Possible comment from the team:* Since the skits cover the first year of implementation of projects discussed in practice session A, the monitor cannot possibly inquire about project impact.

Note No. 15 (cont.)

- Questions that were asked by the monitors concerned:
 - gender awareness/sensitivity of agency staff, but not GAD programs
 - allocation of budget on GAD advocacy, with the project management staff stressing that the project has set aside more than the 5% minimum specified as GAD budget (*Possible comment from the team:* The law that covers the foreign-assisted project is not the GAD budget but RA7192, which requires a higher proportion [20%])
 - processes and tools that help the project identify address gender concerns (e.g., criteria for selection of projects and beneficiaries)
- Manner of asking questions: leading questions?
- Sources of information: mention of reports and documentary reviews; meetings with the PMO, with other groups (including beneficiaries?); field visits (When should beneficiaries be invited? Together with the agencies? Only during field visits?)

Note to the Training Team No. 16: Drawing out issues and principles of gender-sensitive monitoring of project management and implementation

General issues:

- Participation of intended beneficiaries, particularly women and disadvantaged groups, not just the implementing agency or local government unit (LGU), to enable the monitors to validate project reports. Monitors must have access to project documents and reports that support claims of people interviewed.
- Challenges of making meetings as inclusive as possible: Venue of meetings and distance of participants' residence and the meeting place; language used during meetings (local language to make beneficiaries comfortable and really participate) and possible need for translators or interpreters
- Focus on constraints to implementation and on how the project implementers/partners/beneficiaries have addressed or are addressing the constraints.
- Importance of managing time during meetings to make sure that all themes, components, or areas are covered.

Gender-related project management and implementation issues

- When GAD budget is mentioned, it is important to probe how this is actually spent by the project, and verify the claims against financial reports and with beneficiaries or participants of GAD activities.
- When asking about sex-disaggregated project data, monitors should also probe whether there are information on the nature of participation of women and men and on gender-differentiated results.
- To ascertain sustainability of GAD efforts, monitors should ask about policies or ordinances supporting GAD advocacy in the project, agency, or LGU.
- To administer the checklist, the monitor must be comfortable asking GAD questions.
- When asking for GAD in project processes and procedures, monitors should ask about beneficiary qualification and recruitment procedures.
- For the first visit, use box 16 in the revised GAD guidelines to monitor the project's enabling environment; in subsequent visits, the focus can be both the enabling environment and GAD results (box 17).

MODULE THREE: GAD GUIDELINES FOR PROJECT MONITORING AND EVALUATION

The third module of the workshop proper focuses on the second section of Part III of the Harmonized Gender and Development Guidelines that deals with project monitoring and evaluation (M&E). As in Modules One and Two, this module has two major segments: the discussion of the relevant checklist, and application of the checklist to project cases or documents (see box 10).

Box 10. Design of module 3

Session 1: Presentation of the GAD checklist (45 minutes)

Activity 1: Presentation of the GAD checklist for project M&E (15 minutes)

Activity 2: Discussion of M&E indicators (30 minutes)

Session 2: Application of the project M&E checklist (165 minutes)

Activity 1: Practice session on the GAD checklist for M&E (105 minutes)

Activity 2: Processing of workshop outputs in plenary (60 minutes)

Total time: Minimum of 210 minutes

OBJECTIVES

Module 3 seeks to introduce the participants and enable them to apply the GAD checklist for project M&E. Specifically, the module aims to develop among the participants the following:

1. Knowledge in M&E indicators and the requirements of a gender-responsive project monitoring and evaluation; and
2. Skills in the application of the checklist to a project case.

SESSION 1: PRESENTATION OF THE GAD CHECKLIST

Purpose This is intended to introduce the participants to the GAD checklist for project M&E and the requirements for the construction of good M&E indicators.

Timing Total of 45 minutes: (1) 15 minutes for presentation of the GAD checklist for project M&E, and (2) 30 minutes for input on M&E indicators

ACTIVITY 1: INTRODUCTION TO THE GAD CHECKLIST FOR PROJECT M&E

Purpose	This activity aims to acquaint the participants with the key concerns and elements of the GAD checklist for project M&E.
Timing	15 minutes
Materials	Presentation material in electronic file (Word or PowerPoint), computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers; and handouts.
Process	<p>A training team member will introduce the guideline for project M&E. The presentation will cover (1) the principal elements of gender-responsive M&E (see box 11, below), (2) the checklist itself, and (3) the system for scoring project M&E and the combined project implementation and M&E. <i>The resource person can use the second part of presentation 5 in the CD-ROM that comes with this manual.</i> See note #17 for options for handling the M&E GAD checklist. The presenter can entertain questions during or at the end of the presentation.</p> <p>The resource person will stress that the maximum GAD score for project M&E is “12”. Combined with the GAD score for project management, the maximum GAD score for project implementation and M&E will be “20.”</p>

Box 11. Key elements of a gender responsive M&E

1. M&E system includes indicators that measure gender differences in outputs and outcomes.
2. The project database has sex-disaggregated data and gender-related information.
3. The project uses the sex-disaggregated and gender data in its reports and programming.
4. GAD targets are being met.
5. The project is addressing gender issues arising from the way it is being implemented.
6. The project is employing participatory M&E processes.

Note to the Training Team No. 17: Alternatives for handling the GAD checklist for project M&E

The team can introduce the participants to the GAD checklist for M&E either of two ways. It can choose to treat the project M&E checklist as a topic separate from project implementation, as is being done in Module 2. Alternatively, the team can decide to merge the presentation of the checklists for project management and implementation, and M&E. If the second option is taken, then the time allotted for Session 1, Activity 1 of Module 2 will have to be longer by 15 minutes, and the points for discussion of the checklist should be considered in said activity. This means that the new Module 3, Session 1 will focus only on M&E indicators.

SESSION 1: PRESENTATION OF THE GAD CHECKLIST

ACTIVITY 2: INTRODUCTION TO M&E INDICATORS

Purpose	This activity aims to acquaint the participants with the key concepts and principles of M&E indicators.
Timing	30 minutes
Materials	Presentation material in electronic file (Word or PowerPoint), computer and LCD projector; or acetate and overhead projector; or Manila paper and board on which to pin the Manila papers; and handouts (including handouts 3 and 4, in Module 1)
Process	<p>A resource person, who may or may not be a member of the training team, will discuss different types of indicators, the characteristics of a good indicator, construction of indicators, and a checklist for assessing indicators. <i>The resource person can use presentation 6 in the CD-ROM that comes with this manual.</i> See note #18 for some tips regarding GAD indicators.</p>

Some training teams have found it necessary to introduce the session on M&E indicators with a short discussion of the logical framework analysis or project planning matrix. This was done, for instance, by the DENR and Region VI training teams. Handouts 3 and 4 in Module 1 will be useful resources for this mini-lecture on logical framework analysis and how to make it more gender-sensitive.

The logframe, however, may be presented in Module 1, as a way of anchoring the discussion of the GAD checklists for project development. If this has been done, the resource person can integrate a brief review of the logframe in her or his presentation of M&E indicators.

Note to the Training Team No. 18: Tips on GAD indicators

Handout No. 4 in Module 1 raises questions about the gender sensitivity of objectively verifiable indicators (OVIs). In addition,

- Introduce gender equality or women's empowerment in the objective and narrative statement, by relating the statement to the gender issues that should be addressed by the project.
- Construct performance standards that capture gender-differentiated results that are empirically observable and objectively verifiable.

SESSION 2: APPLICATION OF THE GAD CHECKLIST (PRACTICE SESSION C)

ACTIVITY 1: PRESENTATION OF THE GAD CHECKLIST FOR PROJECT M&E

Purpose This activity aims to develop the capacity of participants for applying an important element of the GAD checklist for project M&E.

Timing 105 minutes

Materials Hard copy of the outputs of practice session A, Manila paper, pens, tapes

Process This activity consists mainly of small group discussions, with the participants grouped as in the first two practice sessions. Each participant will be given a copy of the workshop instructions (see handout 9).

A member of the training team will explain the objective and mechanics of the practice session (see note #19), carefully go through the workshop instructions and guide questions, and inform the participants how long they have for the exercise. The groups will write their outputs on Manila papers, which they will post on the wall to form a gallery of workshop outputs.

Note to the Training Team No. 19: What practice session C is all about

The third practice or application session aims to provide the participants a chance to apply an important element of the GAD checklist for project monitoring and evaluation: selection and formulation of gender-sensitive project indicators. The participants will use the same project document and will be divided as in practice session A.

Although the training team members will sit with their respective groups, the participants will choose from among themselves a discussion leader and a reporter. They must be urged to select members who have not served in either capacity in practice session A.

Handout No. 9

Practice session C: Enhancing M&E indicators

When case materials based on proposed projects are used, the questions in box 17 in the revised harmonized GAD guidelines may not be totally applicable. Thus, the groups can use instead the following guide for the practice session on selection of relevant or appropriate GAD indicators.

1. For the project you discussed in practice session A, formulate one gender-sensitive outcome statement that is related to the gender issue you identified in Practice Session A. Such an outcome statement may indicate a change in the situation of women, or narrowing of gaps in the material condition of women and men, in their access to resources that will be distributed by the project, etc. Refer to the relevant section of the harmonized GAD guidelines for sample GAD results.
2. Choose at least two indicators (one quantitative and another qualitative) for this outcome. Also indicate the target you wish to see at the end of the project, and how you plan to measure or verify each indicator.
3. For the outcome, choose two output-level results, or a change that would be discernible immediately or within a year after an activity.
4. Choose at least two indicators (one quantitative and another qualitative). Also indicate your targets and how you plan to measure or verify each indicator.

You may wish to use the following template.

Narrative statement	Indicators	Targets	Method of measurement or verification
Outcome:			
Output 1:			
Output 2:			

SESSION 2: APPLICATION OF THE GAD CHECKLIST (PRACTICE SESSION C)

ACTIVITY 2: PROCESSING OF THE WORKSHOP OUTPUTS

Purpose	This activity aims to develop the capacity of participants for fine-tuning their outputs..
Timing	60 minutes
Materials	Manila paper, pens, and tapes
Process	<p>The training team and the participants will visit each workshop output displayed in the gallery. Team members can volunteer or be assigned to comment on the output of a group other than their own. Note #20 provides tips for assessing workshop outputs. Meanwhile, note #21 offers two examples of how workshop outputs have been processed, with comments of the resource person and training team in bold letters.</p> <p>The training team can close Module 2 by offering a summary of the issues noted in the workshop outputs, by going over the main elements in the GAD checklist that relate to M&E indicators as well as the guide questions found in handout 4.</p>

Note to the Training Team No. 20: Tips on how to assess M&E workshop outputs

One basis for a critique of the workshop outputs is the workshop guide; another is the guide questions in handout 4 in Module 1. A third guide is the GAD checklist for project M&E. One can ask for instance,

- Does the indicator measure possible differences in access by or benefits accruing to women and men, girls and boys? That is, does the indicator require the collection of sex-disaggregated data? Can the data be collected at a reasonable cost? See comments in the first example in note #21.
- Is the narrative statement and the corresponding indicator truly an outcome or an output indicator for the project that was analyzed? If not properly classified, this should be pointed out. See second example of workshop output in note #21.

Note to the Training Team No. 21: **Sample outputs of practice session C, with comments**

Sample 1: Workshop output from the Manila Third Water Sewerage group

	Indicators	Targets	MOV
<p>OUTCOME</p> <p>Households practicing proper disposal of waste water</p>	<p>No. of men and women practicing proper disposal of waste water</p> <p>(Comments: How will this be surveyed? Is it really measurable? Sometimes, you can only see female-headed households and male-headed households, not the actual men and women practicing waste water disposal)</p>	<p>At the end of 3 yrs, 80% of households practicing proper disposal of waste water</p> <p>(Comments: The target should reflect the cumulative improvement in the households practicing proper waste water disposal. For example, 40% after Year 1, 60% after Year 2, and 80% after Year 3)</p>	<p>Survey</p> <p>Barangay health unit reports</p>
<p>OUTPUT</p> <p>Legislative policies/support passed/enacted</p> <p>(Comments: There are already laws; replace this with municipal ordinances or barangay resolutions)</p>	<p>No. of legislative policies/support passed/enacted</p> <p>Budget support (quality)</p>	<p>At the end of the year, 1 comprehensive ordinance/legislative policy passed</p> <p>(Comment: Target for budget support not evident)</p>	<p>Barangay Development Plan</p> <p>(Comment: Is the plan a good basis or should it be barangay resolutions or municipal ordinances passed themselves?)</p>

Sample 2: Workshop output from the Rural Micro Enterprise Promotion Program (RUMEPP) group

	Indicators/Targets	MOV
<p>OUTCOME</p> <p>Improved quality of life of women in Barangay Liloan, Southern Leyte by end of 2010</p>	<p>Increased average income of 50 women engaged in handicraft in Barangay Liloan, Southern Leyte by 50% at the end of 2010</p>	<p>Project M&E report Community Tax Certificate (Comment: How many people really get Community Tax Certificate?)</p>
<p>OUTPUT 1</p> <p>Improved access to credit facilities of Department of Trade and Industry (DTI) partner micro-finance institutions (MFIs)</p>	<p>50 women engaged in handicrafts in Barangay Liloan, Southern Leyte have accessed credit assistance from MFI in the average amount of P20,000 per woman (Comment: Per year?)</p>	<p>Financial records of funding agency Project reports</p>
<p>OUTPUT 2</p> <p>Enhanced self-esteem (Comment: an element of improved quality of life, which is an outcome?)</p>	<p>Hygiene of immediate environment of 50 Barangay Liloan women engaged in handicrafts and their families have improved (clean surroundings, clean and sanitary facilities, personal hygiene) (Comment: This is an outcome indicator)</p>	<p>Physical appearance of the women and family members, and of their dwellings</p>

Sources: Various Training of Trainers sessions on the harmonized GAD guidelines, 2006-2007

MODULE FOUR: RE-ENTRY PLANNING

The fourth module of the workshop proper shifts the focus from building capacities to apply the Harmonized Gender and Development Guidelines to preparing the way for the use of the guidelines by national and local government agencies and offices, and other development stakeholders. Re-entry planning consists of two activities: (1) preparation of agency- or office-level plan of activities to promote the guidelines, and (2) consolidation of plans and identification of joint activities.

OBJECTIVES AND OUTPUTS

Module 4 seeks to enable the participants to visualize their strategy for promoting the use of the harmonized GAD guidelines in their respective offices or agencies, and the technical assistance they will require to make the strategy work. Specifically, the module aims to produce a plan of action that includes activities to be undertaken to garner support for the strategy within the agency, and to mobilize the financial and technical resources to build capacities within their agency for applying the guidelines in their programs and projects.

ACTIVITY 1: PREPARATION OF AGENCY- OR OFFICE-LEVEL PLANS

Purpose	This is intended to encourage the participants to prepare their plan of action for rolling out the training in their respective agencies, offices or regions.
Timing	30 minutes for group work; 30 minutes for presentation of plans by agency or office
Materials	Manila paper, tapes and easel board; or computers and LCD projector; or acetate and overhead projector
Process	The activity consists of two segments. The first is group work. For this, the training team will organize the participants according to agency (if the training involves more than one agency) or office (if the training is for a particular agency). Each group will prepare a 12-month or 24-month plan for (1) introducing their organization to the harmonized guidelines, (2) securing buy-in from management and gathering support for the guidelines, (3) conducting a training or practice session, and (4) ensuring that the guidelines will be used during the preparation of project proposals, and monitoring and evaluation of projects. The team can use the following template:

Planned activity	Tasks involved	Individuals, offices or groups involved	Target date of completion	Resources required

The training team can encourage the participants to think in terms of phases and of the results they wish to see at the end of each phase. For instance, the buy-in from management or key decision-making groups is a result that they may want to see at the end of the first phase. This will facilitate commitment and release of funds and resources, which will enable the TOT participants to organize and conduct training and practice sessions; and the adoption of the harmonized GAD guidelines by the agency.

The second segment will be the plenary session during which all or a sample of the agencies or offices represented in the workshop will present their plans of action. After the presentations, the training team shall endeavor to establish the modalities of the plans of action in preparation for the next activity.

ACTIVITY 2: CONSOLIDATION OF PLANS

Purpose	This activity aims to establish a timeline for activities leading to commitment of agencies and offices to adopt the harmonized GAD guidelines, the conduct of capacity development sessions, and actual application of the guidelines during proposal preparation and evaluation, project implementation, and M&E.
Timing	30 minutes
Materials	Manila paper, tapes and easel board; or computers and LCD projector; or acetate and overhead projector; or whiteboard and markers
Process	A member of the training team will facilitate this final plenary session. Using a rough division of the next 12 or 24 months by month or quarter, the facilitator will ask the participants to indicate when they plan to undertake certain key activities. This will help NEDA and the group track the following: (1) when they will need NEDA or agency directives to be out; (2) how demand for technical assistance can be distributed over the one-year or two-year period, and (3) what NEDA and NCRFW can monitor over said period.

During the various TOT sessions, the participants listed preparatory or additional things that they may need before they themselves can conduct training or practice sessions. Among these are:

- A follow-up letter from NEDA and/or NCRFW that will facilitate the use of the harmonized GAD guidelines by agencies and regions; or within a region, a letter from the Regional Development Council (RDC) to local government units endorsing the adoption of the guidelines in the region;
- Interface between agency GAD focal points and TOT participants;
- Conduct of gender analysis to help the training team further develop its capacity to identify gender issues in various sectors or project situations; and
- Identification of a resource pool that can help training teams in various regions, agencies or offices to conduct training or practice sessions on the harmonized GAD guidelines.

Note #22 is provided below to help the team prepare for training or practice sessions. Should the agency choose to support practice sessions instead of training sessions, the training team can use the Introductory Module and Module 1 in this manual. Meanwhile, note #23 offers tips on how to conduct the practice sessions.

Note to the Training Team No. 22: Preparing for the training or practice sessions

1. Secure a memorandum directing agencies to apply the harmonized GAD guidelines in preparing gender-responsive projects.
2. Form a task force that will be responsible for the application of the harmonized GAD guidelines in the agency. The members of this task force can be drawn from among program planners, implementers, the GAD focal persons, and the agency's representative to the TOT on the harmonized GAD guidelines.
3. Secure management support, including funding (tapping GAD budget).
4. Design the practice session, specifying how many days it will run, and the modules, materials and methods that will be used. You may use the present training manual as reference. Explore if the agency wants to use live program or project documents. If so,
 - secure permission to use the documents and have enough copies reproduced;
 - revise, if needed, the practice session guide questions, particularly those for practice session A; and
 - decide on the coverage of the session—separate sessions for quality at entry (project design), monitoring project management and implementation, and M&E.
5. Reproduce the training materials, including project documents that will be used for the practice session.
6. Request NEDA and NCRFW staff for technical assistance, if needed.

Note to the Training Team No. 23: Tips for running practice sessions

- Identify a lead resource person or facilitator among the training team members, and assign tasks to the other members.
- Break the practice session participants into small groups, which can work on selected proposed projects; and supply each group with a copy of the practice session instructions and expected output(s), which is an enhanced project design (in the case of the quality at entry session).
- Implement the design for the practice session.

PARTIAL LIST OF TRAINING RESOURCE MATERIALS

- Asian and Pacific Development Centre (APDC). 2003 Report on the APDC Regional Training Course, "Effective Mainstreaming for Gender Equality: Concepts, Tools and Strategies." 6-24 October. Kuala Lumpur.
- Francisco, Josefa S. 2002. *Gender Gap Audit Toolkit for Social Investigation*. Quezon City: Women and Gender Institute, Miriam College.
- Guzman-Ututalum, Cristy, and Luz Lopez-Rodriguez. 1998. *Gender Resource Management through Participation Rural Appraisal and Gender Analysis (PRAGEN)*. Iloilo City: Local Government Support Program, Region 6, funded by the Canadian International Development Agency.
- Illo, Jeanne Frances I. (editor). 1996. *Gender in Projects and Organizations: A Casebook*. Quezon City and Manila: Institute of Philippine Culture, Ateneo de Manila University, and National Commission on the Role of Filipino Women.
- _____. 1991. *Gender Analysis and Planning: The 1990 IPC-CIDA Workshops*. Quezon City: Institute of Philippine Culture, Ateneo de Manila University.
- Kabeer, Naila. 1994. *Reversed Realities: Gender Hierarchies in Development Thought*. London and New York: Verso.
- Kabeer, Naila, and Ramya Subrahmanian (editors). 1999. *Institutions, Relations and Outcomes: A Framework and Case Studies for Gender-Aware Planning*. New Delhi: Kali for Women.
- Moser, Caroline O.N. 1993. *Gender Planning and Development: Theory, Practice & Training*. London and New York: Routledge.
- National Commission on the Role of Filipino Women (NCRFW). 2001. *A Guidebook on Gender Mainstreaming: How Far Have We Gone?* Manila: NCRFW.
- _____. and Department of Health (DOH), and United Nations Population Fund (UNFPA). 2006. *Gender-Responsive and Rights-Based Integrated Reproductive Health Service Delivery: A Training Manual. Volume 1: Facilitator's Guide*. Manila: NCRFW, DOH and UNFPA.
- Overholt, Catherine, Mary B. Anderson, Kathleen Cloud, and James E. Austin (editors). 1985. *Gender Roles in Development Projects: A Case Book*. West Hartford, Conn.: Kumarian.
- Philippine Council for Agriculture, Forestry and Natural Resources Research and Development (PCARRD) and Department of Science and Technology (DOST) 1998. *A Sourcebook of Gender Cases in Agriculture, Forestry and Fisheries*. Los Baños: PCARRD.
- Thomas-Slayter, Barbara, Andrea Lee Esser, and M. Dale Shields. 1993. *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management*. Published by the International Development Program of Clark University for the ECOGEN Research Project.
- Thomas-Slayter, Barbara, Rachel Polestico, Andrea Lee Esser, Octavia Taylor, and Elvina Mutua. 1995. *A Manual for Socio-Economic and Gender Analysis: Responding to the Development Challenge*. Produced by Clark University for the Ecology, Community Organization (ECOGEN) project of Clark University and Virginia Polytechnic Institute and State University.
- Torres, Amaryllis T., and Rosario S. del Rosario. 1994. *Gender and Development: Making the Bureaucracy Gender-Responsive. A Sourcebook for Advocates, Planners, and Implementers*. N.Y., Manila and Quezon City: United Nations Fund for Women, National Commission on the Role of Filipino Women, and HRSpecialists.
- United Nations Children's Fund (UNICEF). 1994. *Gender Equality and Women's Empowerment*. Training package developed by Longwe, Clarke and Associates for UNICEF staff training purposes. New York: UNICEF

Gender Mainstreaming Resource Kit (GMRK)

- NCRFW and Canadian International Development Agency (CIDA). 2003. *Transforming Government to Think and Act GAD. A Handbook on Gender and Development Training, Books 1 & 2*. Manila: NCRFW and CIDA.
- _____. 2002. *Guidebook in Using Statistics for Gender-Responsive Local Development Planning*. Manila: NCRFW and CIDA.
- _____. 2002. *Ways to Gender Responsive Organizations: Tools and Guides for Sowing Gender Responsiveness in Government Organizations*. Manila: NCRFW and CIDA.
- National Economic and Development Authority (NEDA), NCRFW, and CIDA. 2002. *Mainstreaming Gender in Development Planning: Framework and Guidelines*. Manila: NEDA, NCRFW, CIDA.