Part 1
Gender

INTRODUCTION

In this part of the manual we focus on the concept of gender: What is gender? How can we find out about gender in different settings? Why is it important to consider gender in development and research programmes? Many manuals and articles deal with gender and related concepts and tools for gender analysis. Some definitions are simple, others are complex; there is overlap, but also contradiction. Some tools are easy to use, others need considerable inputs in terms of time, resources, and skills. Here we do not discuss the various concepts and analytical tools in depth, but limit ourselves to brief definitions and explanations in order to understand the social processes that are addressed in this manual: changes within organisations and, related to these, the programmes or other products of such organisations. We particularly make use of one set of concepts developed by A. Rani Parker, I. Lozano and L.A. Messner for Save the Children.

This part is divided into three sections. In Sections 1 and 2 we pay attention to gender and related concepts and frameworks for gender analysis. Since our experiences are to a great extent linked to organisations engaged in natural resource management, we specifically addressed the linkages between gender and natural resources in an exercise. The last Section (3) is concerned with gender and rural development programmes as the products of the organisations on which we are focusing.

Section 1: What is Gender?

The concept of gender is, for many people, a new idea. Basically it is simple: it is about men and women, about what they do and feel and how they relate to each other in their own societies. In all societies and families, men and women learn, through socialisation processes, how to behave properly within a community or organisation. However, behaviour is not fixed, as it is influenced by social, cultural, economic, political, and ecological factors. There is no natural distinction of what men and women should do beyond distinctions related to their physical differences. This is seen clearly by the variance in the types of activity women and men are engaged in in different countries or even areas within countries. In some places women work in construction, in others that is 'not done'; in some parts men wash dishes, in others men will never do this; in some organisations men and women discuss decisions together at meetings, in others women do not speak out in the presence of men. This behaviour does not apply to every woman or man in that particular situation: we see differences in the attitudes and behaviour of men and women of different age groups, social class, caste, and ethnicity.

Thus, the behaviour and attitudes of men and women vary in every society and between societies, and vary over time. This results in a rich diversity of men and women, resulting in an even richer diversity of experiences and capabilities of people. We feel that in every process of change, including organisational change, we should draw on this diversity and value it highly.

The 'gender wheel'

The 'wheel' pictured below is useful for understanding the concept of gender[1]. The relationships between roles, rights, and so on are visualised by using a circle with inter-relating 'spokes'.
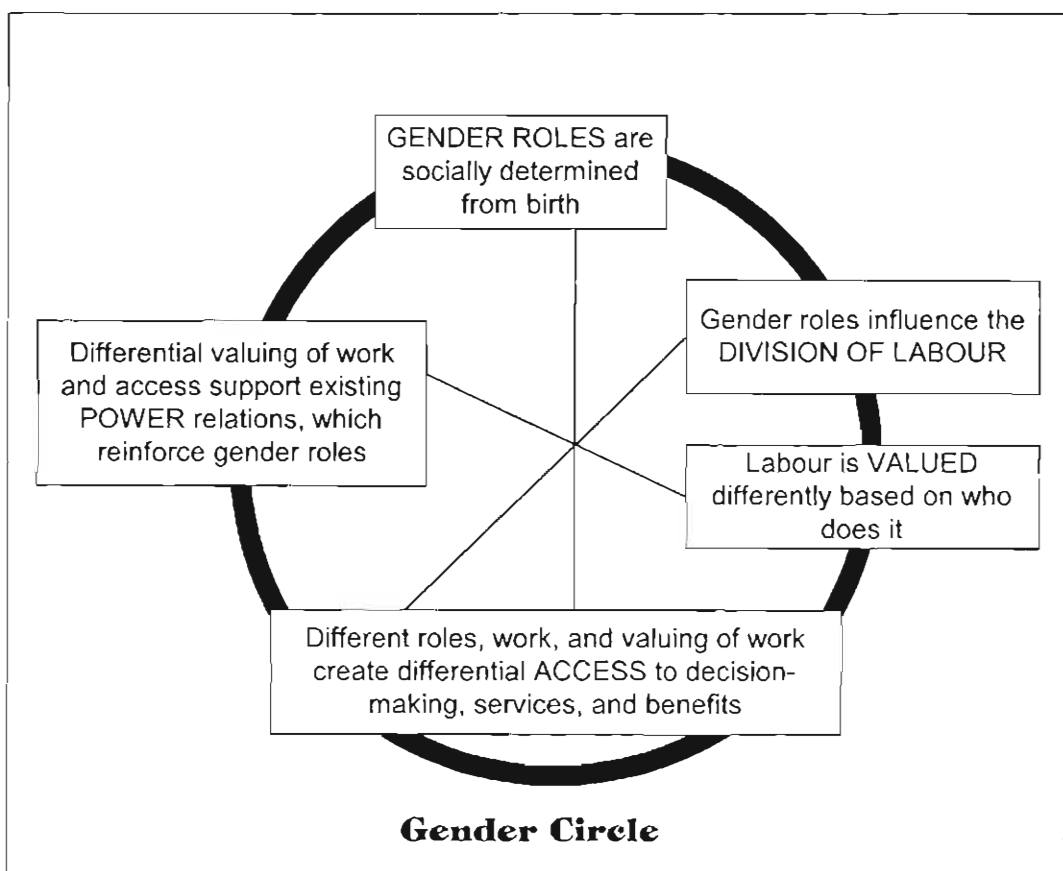
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[1] Parker et al. (1995) developed the gender circle and we have changed it slightly.

Our dictionary

Gender is about the Roles, Responsibilities, Rights, Relationships and Identities of men and women that are defined or ascribed to them within a given society and context. Gender is about how these roles, responsibilities, rights, and identities of men and women affect and influence each other. Gender points to their dynamic nature: they are changeable over time, between places and within places. In that sense gender differs from the concept Sex.

Sex refers to the biological nature of being male or female. The biological characteristics of men and women are universal, obvious, and, in general, permanent. Sex roles are those which are bound to one particular sex due to biological factors, for instance, breastfeeding.

Gender roles refer to how men and women should act, think, and feel according to norms and traditions in society. Roles are reflected in the tasks and responsibilities expected of men and women and identities associated with being male or female in a certain society. In many organisations, socially accepted roles are reflected in the positions and responsibilities of male and female staff. Gender roles influence the **division of labour**, i.e., the tasks and responsibilities allocated to men and women according to what is felt to be acceptable in society. Gender roles are 'learned' through socialisation processes. We can distinguish between tasks and responsibilities related to:

GENDER ROLES are socially determined from birth

Gender roles influence the DIVISION OF LABOUR

Labour is VALUED differently based on who does it

Different roles, work, and valuing of work create differential ACCESS to decision-making, services, and benefits

Differential valuing of work and access support existing POWER relations, which reinforce gender roles

Gender Circle

- production (activities such as crop production, processing, marketing, wage employment, and so on);
- reproduction ('unpaid' activities such as care of the family, child bearing, food and water collection, home maintenance, and so on);
- social/community management(social activities at neighbourhood, community, organisation level, political participation, and so on).

These **triple roles** are not only visible at household and community levels but also within organisations.

Values are attached to these different tasks and responsibilities that are different for men and women. This is termed the **gender valuation of work**. Differences in roles, tasks, and responsibilities and valuation have a great impact on two essential elements for survival and development: the access to and control over resources (natural resources, information, services, facilities, time, funds, and so on). They create differential access between men and women to these resources, to decision-making, and to benefits related to them. This is termed gendered access, emphasising that access is socially constructed.

The determination of what behaviour is valued and who obtains access and control of resources is determined largely through **power relations**. The current gender valuation of work and levels of access and control support the existing power relations and, in turn, power relations affect access and valuation. Access is about the distribution of resources in which power relations are at stake. Power relations have a strong gender dimension as they have to do with the capabilities and opportunities of men and women to influence processes. We can also see the links between gender roles and tasks and responsibilities, affecting who can play a role in influencing processes. See Part 3 for more on this topic.

Our dictionary

Gender roles refer to how men and women should act, think, and feel according to norms and traditions in society and are reflected in their tasks and responsibilities and identities associated with them.
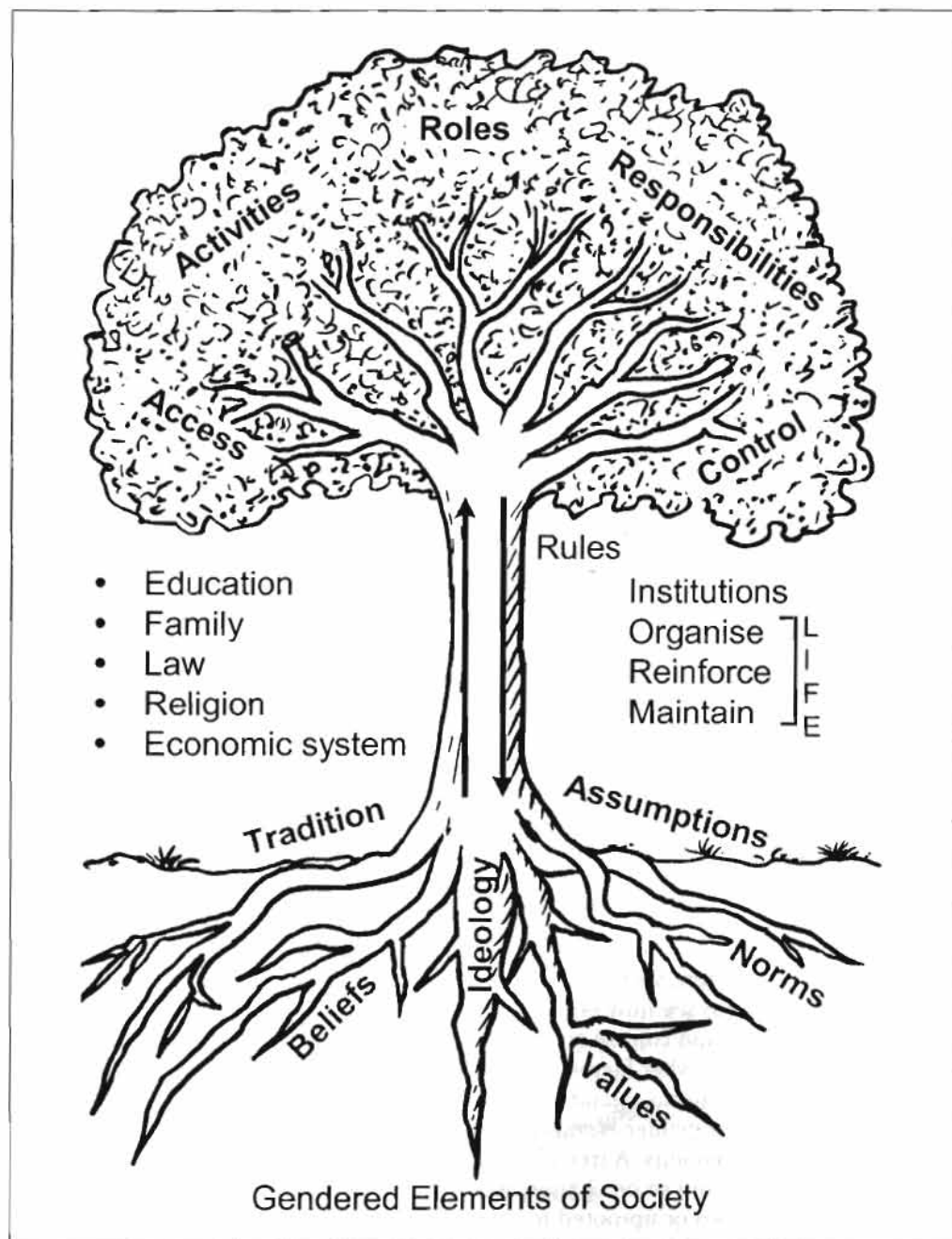
The **gender division of labour** concerns allocation of the tasks and responsibilities of men and women according to felt, accepted patterns of work.

The **gender valuation of work** refers to the values attached to different tasks and responsibilities of men and women.

Gendered access and control refers to the fact that access and control over resources and so on are socially constructed.

Gender is to a certain extent visible: we can see what men and women are doing, but it becomes more difficult to see how people value their actions. It is not an easy task to observe who has access and control over certain resources and processes. Even more complicated is to find out what factors are underlying these observations and processes – these are the traditions, norms, assumptions, and values of individuals and societies. In order to understand how gender is constructed, we can use the symbol of a tree with both its visible and hidden elements. A tree also symbolises other characteristics of gender. Roles, gendered access, and so on change over time as a tree changes its form and size. It can purposely be trimmed or uprooted to change its appearance or well-being without

killing the tree. The management of such a process needs a critical consideration of the right time, context, instruments, and people to carry out the job – just as does transforming gender roles and relations in order to create a better balance between men and women.

- Education
- Family
- Law
- Religion
- Economic system

Rules

Institutions
Organise ⎤ L
Reinforce ⎥ I
Maintain ⎦ F
E

Gendered Elements of Society

FURTHER READING

BRIDGE (1999) *Resource Guide to Southern Gender Training Materials*. Brighton: IDS, University of Sussex

Food and Agriculture Organisation of the United Nations (1997) *Socio-economic and Gender Analysis Programme (SEAGA)*. Rome: FAO

Moffat, L.; Geadah,Y.; Stuart, R. (1991) *Two Halves Make a Whole: Balancing Gender Relations in Development*. Ottawa: Canadian Council for International Cooperation

Parker, R.; Lozano, I.A.; Messner, L.A. (1995) *Gender Relations Analysis: A Guide for Trainers*. New York: Women Ink

Royal Tropical Institute (1998) *Gender Training: The Source Book*. Amsterdam: KIT Press

Williams, S.; Seed, J.; Mwau, A. (1994) *The Oxfam Gender Training Manual*. Oxford: Oxfam UK and Ireland

EXERCISES: THE CONCEPT OF GENDER

We present a few simple exercises to increase understanding of the concept of gender. See 'Further reading' for more suggestions. Videos, films, and case studies are powerful stimuli for discussion, especially when they are based on the local context. Users are invited to look for locally available materials and to develop case studies themselves.

A.   Likes and dislikes
(adapted from Williams et al. [1994, activity 26])

Aim of the exercise: to better realise that behaviour and feelings of men and women are influenced by society.

Time: about 30 – 45 minutes

Method: individual reflection, discussion

Materials: marker and cards for each participant, whiteboard or wall

Steps
1. Ask each participant to write answers to the following question on cards. 'What would you like and what would you dislike if you were the other sex?' Let them write one answer per card, indicating their sex. Use different colours for the 'likes' and the 'dislikes'.
2. After 8 minutes collect the cards. Put the cards on a wall differentiating between male and female participants. Discuss in plenary the different answers and the possible reasons behind the answers.

Variation
Instead, the following question can be asked to male participants.
'What do you enjoy most or like best about being a man? What do you dislike most or like least about being a man?' Ask the same question to each female participant about being a woman. Compare the outcomes.

B.   Statements about Sex and Gender–an exercise stimulating discussion
(Williams et al. 1994 pp 89)

Aim of the exercise: to understand the difference between sex and gender

Time: about 30 minutes

Method: statement game

Materials: pen and paper, handout to exercise B Part 1 (list of statements)

Steps
1. Discuss the concepts of gender and sex
2. Read the statements aloud and ask each participant to write the answer to each statement: either Gender or Sex
3. Distribute the handout and discuss the answers.

C. Statements at the work place
Lowitz (1980)

Aim of the exercise: to better understand the concept of gender as a social construct

Time: about 30 minutes

Method: statement game

Materials: pen, paper-handout to exercise C - Part 1 (list of statements) see 'He Works, She Works'

Steps
1. Form small discussion groups, mixed or men and women-only.
2. Give each group copies of the handout with statements and ask them to discuss
   a) whether or not they recognise the statements, and
   b) what the consequences arising from certain 'statements' have been and which they have faced themselves or what could have been consequences. Ask them to make notes.
3. Discuss the most striking observations of the groups in a plenary session.

D. Changing gender roles
Idea: Ferida Sher

Aim of the exercise: to better understand how men and women are socialised to roles and identities

Time: about 30 minutes

Method: role play

Materials: depending on ideas of participants

Steps
1. Ask a few participants to prepare and play roles related to an activity that is usually performed by the other sex. You can propose, for instance, that men ' feed a nine-month old baby'; ' bathe a 1 ½ year old child'; and that women ' fix a fuse when the electricity goes out'.
2. Discuss afterwards. Pay specific attention to how the players felt about their roles and the way they performed.

E. Heroes and Heroines
Idea: Nan van Leeuwen

Aim of the exercise: to better understand that behaviour and actions are ascribed by cultural and social factors.

Time: about 40 minutes

Method: individual and group reflection

Materials: pen and paper, whiteboard

Steps
1. Ask each participant to write down the name of her/his hero or heroine and what characteristics make him or her a hero/heroine.
2. Discuss the outcomes. Pay attention to similarities and differences in qualities and in the wording used by participants to describe characteristics of heroes and heroines.

HANDOUTS

Handout for exercise B: List of statements about sex and gender
(Williams et al. 1994, pp 89)

Statements about men and women

1. Women give birth to babies, men don't. (S)
2. Little girls are gentle, boys are tough. (G)
3. In one case, when a child brought up as a girl learned that he was actually a boy, his school marks improved dramatically. (G)
4. Amongst Indian agricultural workers, women are paid 40-60 per cent of the male wage. (G)
5. Women can breastfeed babies, men can bottlefeed babies. (S)
6. Most building-site workers in Britain are men. (G)
7. In Ancient Egypt men stayed at home and did the weaving. Women handled family business. Women inherited property and men did not. (G)
8. Men's voices break at puberty, women's do not. (S)
9. In one study of 224 cultures, there were 5 in which men did all the cooking, and 36 in which women did all the house building. (G)
10. According to UN statistics, women do 67 per cent of the world's work, yet their earnings for it amount to only 10 per cent of the world's income (G).

Handout for exercise C: List of statements 'He works, she works'
(Lowitz 1980)
Source: Unknown

HE WORKS, SHE WORKS

BUT WHAT DIFFERENT

IMPRESSIONS THEY MAKE!

Have you ever found yourself up against the old double standard at work? Then you know how annoying it can be and how alone you can feel. Supervisors and co-workers still judge us by old stereotypes that say women are emotional, disorganised, and inefficient. Here are some of the most glaring examples of the typical office double standard.

The family picture on HIS desk Ah, a solid responsible family man	The family picture is on HER desk Hmm, her family will come before her career.
HIS desk is cluttered He 's obviously a hard worker and a busy man.	HER desk is cluttered She's obviously a disorganised scatter-brain.
HE'S talking with co-workers He must be discussing the latest deal.	SHE'S talking with co-workers She must be gossiping.
HE'S not at his desk He must be at a meeting.	SHE'S not at her desk She must be in the ladies room.
HE'S not in the office He's meeting customers.	SHE'S not in the office She must be in the ladies room.
HE'S having lunch with the boss He's on his way up.	SHE'S having lunch with the boss They must be having an affair.
The boss criticised HIM He'll improve his way up.	The boss criticised HER She'll be very upset.
HE got an unfair deal Did he get angry?	SHE got an unfair deal Did she cry?
HE'S getting married He'll get more settled.	SHE'S getting married She'll get pregnant and leave.
HE'S having a baby He'll need a raise.	SHE'S having a baby She'll cost the company money in maternity benefits.
HE'S going on a business trip It's good for his career.	SHE'S going on a business trip What does her husband say?
HE'S leaving for a better job He recognises a good opportunity.	SHE'S leaving for a better job Women are undependable.

Section 2: How to Find Out about Gender? – Gender Analysis

A gender analysis can be carried out to understand the roles and relationships of men and women within a given context. It can be done in a community, region, and so on, as well as in an organisation (see Part 2 - Section 2 for more on organisational analysis).

> **Our dictionary**
>
> **Gender analysis** is the systematic effort to understand the roles and relationships of men and women within a given context such as that of a household, community, region, or organisation.

Gender analyses are often done in the context of development efforts. Throughout the years various tools for analysis have been developed. These tools address a number of key issues which are ordered or framed in a particular way according to a specific framework (see Box 1).

Box 1: Key areas for analysing gender roles and relations

Note: It is important to identify the age group, class/caste, ethnicity, and marital status of the men and women participating in the analysis.

- Activities (tasks and responsibilities): who does what, where, and when?
- Amount of time spent conducting their tasks and responsibilities, considering seasonality: how much time is spent and when?
- Access to resources required for the tasks and responsibilities and to the benefits derived from using them, according to gender
- Control over these resources and over the benefits derived from their use, according to gender
- Role and participation of men and women in decision-making processes at household and community levels, within formal and informal groups
- Needs and priorities of men and women in the context of improving the present situation, for both the short and long term
- Effects and impacts of certain trends and developments on men and women, including economic, demographic, environmental, sociocultural, political, and legal developments
- Constraints and barriers to active involvement of men and women in development efforts and initiatives to overcome these
- Opportunities and options open to men and women to improve their lives
- Organisations involved in local development and their capabilities in terms of recognising and addressing gender issues

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Usually these questions are framed for purposes of analysis in 'profiles', in which we can see links between the different elements of the 'gender wheel '(see Part 1 - Section 1) such as the following.

- Activity profile – concerning tasks and responsibilities carried out by members of a household according to gender, age, and marital status and related to time and location. It includes the question, "Why are these arrangements as they are (cultural, social, economic, legal, etc. factors)?"
- Resource profile – concerning access to resources in order to pursue activities and to receive benefits and the control over resources and benefits. It includes the question, "Why are these arrangements as they are?"
- Participation profile – concerning participation in decision-making processes in general and in relation to development efforts. It includes the question, "Why do certain people participate and what are the barriers and opportunities for participation?"

Here, we do not elaborate on the different gender analysis tools and methods to gather information. There are many tools and frameworks for gender analysis, and these are described in the following books.

FURTHER READING

On gender analysis frameworks and methodologies

March, C. (ed) (1996) *A Tool Kit: Concepts and Frameworks for Gender Analysis and Planning.* Oxford, UK: Oxfam Gender and Learning Team

March, C.; Smyth, I.; Mukhopadhyay, M. (1999) *A Guide to Gender-Analysis Frameworks.* Oxford, U.K.: Oxfam

Food and Agriculture Organisation of the United Nations (1997) *Socio-economic and Gender Analysis Programme (SEAGA).* Rome: FAO

Feldstein, H.; Jiggins, J. (eds) (1994). *Tools for the Field: Methodologies Handbook for Gender Analysis in Agriculture.* London: Intermediate Technology Publications

Feldstein. H.; Poats, S.V. (1989) *Working Together: Gender Analysis in Agriculture.* West Hartford, Connecticut: Kumarian Press

Guijt. I. (1996) *Questions of Difference: PRA, Gender and Environment.* London: International Institute for Environment and Development

Parker, A.R. (1993) *Another Point of View: A Manual on Gender Analysis Training for Grassroots Workers.* NY: UNIFEM

Rao, A.; Anderson, M.B.; Overholt, C.A. (1991) *Gender Analysis in Development Planning.* West Hartford, Connecticut: Kumarian Press

Thomas-Slayter, B.; Esser, A. L.; Shields, M.D. (1993) *Tools for Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management.* Worchester MA: Ecogen Research Project, Clark University

Williams, S.; Seed, J.; Mwau, A. (ed) (1994) The Oxfam Gender Training Manual. Oxford: Oxfam (UK and Ireland)

<u>On gender and natural resources management</u>

FAO (1995) *Gender analysis and Forestry Training Package.* Rome: FAO

Guijt, I.; Shah, M.K. (eds) (1998) *The Myth of Community: Gender Issues in Participatory Development. London:* Intermediate Technology Publications

'Gender and Natural Resource Management: An Introduction' (Handout # 76). In Williams, S.; Seed, J.; Mwau, A. (1994) .*The Oxfam Gender Training Manual.* Oxford: Oxfam U.K. and Ireland

Commonwealth Secretariat (1996). *The Pan-Commonwealth Training Module on Women and Natural Resource Management* (Africa, Asia, South Pacific, Caribbean). London: Commonwealth Secretariat

<u>On participatory exercises</u>

Pretty, J.N.; Guijt, I.; Thompson, J.; Scoones, I. (1995) A Trainers Guide for Participatory Learning and Action. London, U.K.: International Institute for Environment and Development

EXERCISES: GENDER ANALYSIS

F.   Gender analysis as a tool
(FAO 1995)

Aim of the exercise
1. To get to know one of the frameworks for gender analysis
2. To increase knowledge about the strengths and limitations of gender analysis tools

Time: about 25 minutes

Method: video, discussion

Materials: video 'Gender Analysis for Forestry Development Planning: Why and How?' available from the Senior Community Forestry Officer, Forestry Policy and Planning Division, Forestry Dept., Food and Agriculture Organisation of the UN, Vialle delle Terme di Caracalla, Rome 00100 Italy. pen and paper, whiteboard

Steps
1. Explain that a video will be shown which illustrates one of the gender analysis frameworks. Explain the framework briefly.
2. Show the video.
3. Discuss the video. Ask for the observations and comments of participants. Point to the advantages and pitfalls of the framework and development approach promoted in the video.

Variation
1. More specific questions can be asked to direct the attention of the participants while watching the video to adjust it to their background and needs. Moreover, specific questions can be made related to the handout.
2. Use the ICIMOD video on gender relations in Nagaland, India (described below) and have different groups answer the questions listed in the box below.
Questions on the ICIMOD Film *Land and Ritual: Among the Angami Naga*, 1997 (23 min) (available from Publications, ICIMOD, Box 3226, Kathmandu, Nepal)

1. Who are the stakeholders? What are their different perspectives? Do they conflict?
2. What are the key issues to monitor? What are the key aspects of sustainability here? How do you know if it is equitable ?
3. What are the changes? What are the causes of the changes? Which are positive and negative elements of change and why?
4. What are the impacts on gender relations? What strategies do men and women use to deal with these changes?

G.   Links between gender and natural resources

Aim of the exercise: to increase understanding of the links between gender and natural resources

Time: about 45 minutes

Method: reflection on own situation, discussion

Materials: Handout of exercise G (Gender and Natural Resource Management) — pen and paper, whiteboard

Steps
1. Give the handout to each participant. Explain the diagram and exercise. Ask each participant to select one natural resource she/he is familiar with through their own experiences in a development programme. Let them answer the following questions.
   a. What roles and responsibilities related to managing the natural resource you have chosen do men and women have at your own project site?
   b. Do women have equal access and control relative to men to that resource at your project site? Explain the situation. If no, go to questions c and d; if yes, go directly to question d.
   c. Identify four main factors responsible for creating inequalities.
   d. Do you feel that women, relative to men, receive a 'fair' share of the benefits arising from the management of that particular resource? Explain.

2. Form small groups around each type of natural resource to exchange information and ask the group members to describe three striking observations.
3. Discuss the observations in a plenary session. The important issues to consider are the elements of the gender wheel: division of labour, valuation, gendered access and control; variety between and within places (projects); and the personal perspective of the participant in judging the situation in terms of 'equal' and 'fair'.

HANDOUTS

Handout for exercise G: Gender and natural resource management

Kamal Rijal

Agro-ecosystems consist of a number of natural resources that are interrelated in a complex way. Men and women make use of these resources according to certain rules and norms prevailing in a specific local culture. Often the roles of women and men in natural resource management are complementary and intertwined. The following diagram, based on FAO (1997), is a simplified way to describe the roles, responsibilities, and rights of male and female users of four inter-linked types of natural resource. The linkages between the resources and the ways men and women make use of them at household and community levels are dynamic in nature. They can be affected by a number of external factors, such as commercialisation, political interests, agricultural policies, but also by drought, diseases, and so on.
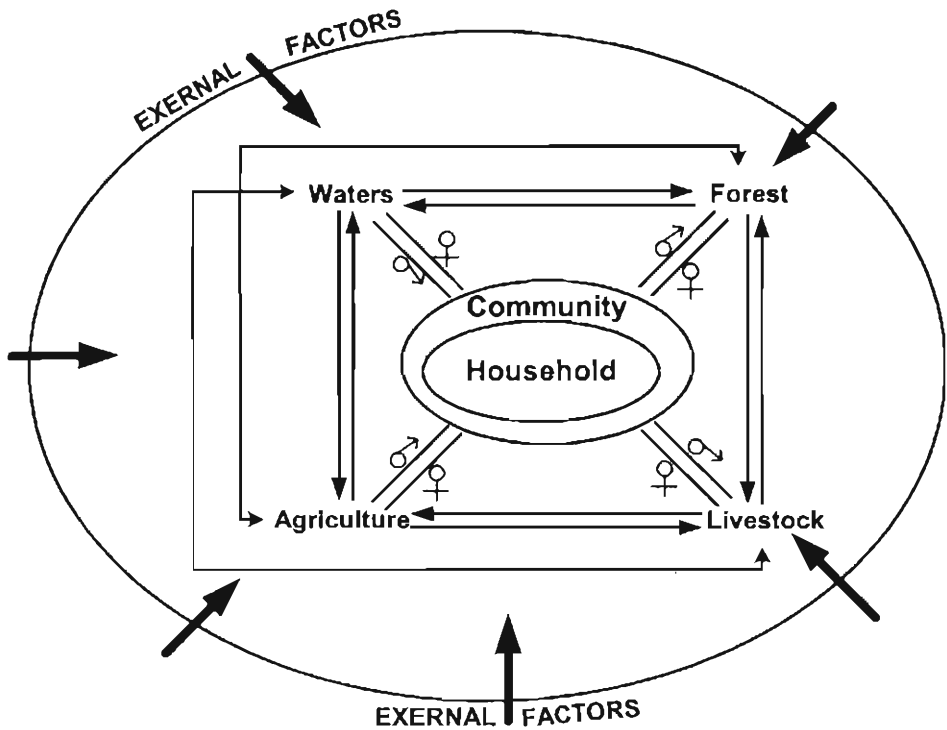
Diagram Belonging to Exercise G

Section 3: Gender and Development

Gender cannot be overlooked in any development programme, because differential roles, responsibilities, rights, and identities form part of social reality. Furthermore, men's activities or rights mutually affect those of women and, thus, changes to one will affect the other. In other words, development efforts will always, purposely or not, impact men and women differently.

Since the 1970s, the lower status and living conditions of women around the world have generated global concern. Women's concerns or issues and, later on, **gender concerns/ issues** were identified to show how unequal responsibilities, rights, and values were felt to be unacceptable, i.e., being a concern to people. These views are based on perceptions that people have of a present situation as compared to an ideal situation. The differences between the present unacceptable situation of women relative to men and the ideal situation are called **gender gaps**. It is important to stress that perceptions can vary: what one person considers unfair or unjust inequities can be acceptable to another.

Over the years different approaches towards women have been applied in rural development programmes to overcome 'gaps' as perceived by planners, policy-makers, and implementers. The focus gradually changed from women – the Women in Development (WID) approach - to one of relations between women and men. Called the Gender and Development (GAD) approach, this aims for equitable, sustainable, and participatory development. Equitable development means that gender relations become more balanced. It can be compared to the process of adding weight to one of the pans of a balance. In many cases women have less 'weight', for instance, they take less part in decision-making processes or have less control over land. Men have often less 'weight' in the area of daily care of children. To balance the scales one needs power, therefore, we often speak of empowerment of women (or men). Equitable development is closely related to participatory development, which means that women and men are able to voice their views and needs and to take part in decisions affecting their situation.

To better address the situation of women relative to men a distinction is made between condition and position in society. It helps to differentiate between categories of gender needs: the practical gender needs, which relate to the condition, and strategic gender needs, which relate to the position of men and women relative to each other.

Our dictionary

Condition refers to the immediate, material circumstances in which men and women carry out their responsibilities. It relates to basic needs such as those for food, shelter, water, and health.

Practical gender needs (PGN) arise from the gender roles, division of labour, and access to resources. They are material in nature and concern short-term and felt, immediate needs. In general they are relatively easy to identify as they relate to the condition of women and men, typified, for instance, by a shortage of nutritious food, health care, or drinking water. When addressed, men and women can perform their gender roles more efficiently and easily.

Women's position refers to women's place in society in relation to that of men. It relates to power, status, and control over decisions and resources.

Strategic gender needs (SGN) arise from unequal relations and control over resources. They refer to social relations between men and women. In general, SGN are less visible and more difficult to identify. Examples are unequal access to jobs, unequal wages, and fewer legal rights. They require more long term and radical actions, as changes are required in attitudes, behaviour, beliefs, values, power relations, laws, and so on.

Gender concerns or issues refer to differences in responsibilities, rights, values, and power between women and men, which are felt unacceptable and, therefore, need to be addressed.

Gender gaps are differences between the present unacceptable condition and/or position of women relative to men and what is considered an ideal situation

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Since most development programmes strive to achieve sustainable development, attention to the condition and position of women and men is a basic requirement. Planners and implementers can be helped in their efforts through creation of an awareness of the underlying values and ideologies of development approaches as well as by increasing

knowledge and insight in the situation of men and women. Conducting a gender analysis (see Part 1 - Section 2) of a community is a way to gain knowledge and insight, as it can be considered a situation analysis for planning and monitoring and evaluation purposes. Gender analysis is part of gender planning, i.e., planning for development in which gender needs are identified and gender issues are addressed, thus contributing to equitable, sustainable, and participatory development. It includes specific attention to the opportunities and barriers of women and men to such development (see the key areas and profiles in Section 2). Based on this information approaches and strategies can be developed.

More information on concepts, approaches, methods, and experiences related to gender in development goes beyond the aim of this manual. We refer to the wealth of existing literature. In 'further reading' some practical handbooks are included.

FURTHER READING

On concepts, approaches and planning

Abbot, J.; Guijt, I. (1998) *Changing Views on Change: Participatory Approaches to Monitoring the Environment.* SARL Discussion Paper No. 2. London: International Institute for Environment and Development

Moffat, L.; Geadah, Y.; Stuart, R. (1991) *Two Halves Make a Whole: Balancing Gender Relations in Development.* Ottawa: Canadian Council for International Cooperation

Guijt, I. (1998) *Participatory Monitoring and Impact Assessment of Sustainable Agriculture Initiatives.* SARL Discussion Paper No.1. London: International Institute for Environment and Development

Moser, C. (1993) *Gender Planning and Development: Theory, Practice and Training.* London and New York: Routledge

Schaap, M. (1998) *Reference Guide for Gender Responsiveness in Project-Cycle Management.* Kathmandu: FAO Nepal

Williams, S.; Seed, J.; Mwau, A. (1994) *The Oxfam Gender Training Manual.* Oxford: Oxfam UK/ Ireland

EXERCISES: GENDER AND DEVELOPMENT

H. Development approaches towards women in relation to men

Aim of the exercise
1. To gain insight into the approach of development programmes
2. To increase awareness about personal perceptions and values concerning gender in development programmes

Time: about 40 minutes

Method: reflection on the own situation, discussion

Materials: Handout of exercise H (Overview of approaches) — Pen, paper, flipchart, whiteboard

Steps:
1. Introduce the topic and aims of the exercise. Stress that any overview is a simplification and abstraction of the reality, but instrumental to increasing our insights.
2. Ask each participant to reflect on the following questions.
    a. In which approach(es) would you place the programme/project you work in? Explain.
    b. Why do you feel that gender issues need to be addressed in the programmes of your own organisation? Write all your arguments on a piece of paper.
    c. Exchange your views in a small group and together select a few arguments to present to the plenary. Write them on a flip chart.
3. Discuss the outcomes of the groups in the plenary. Point out possible differences between justifications of approaches in programmes of the organisations and the personal views of participants. Reflect on the consequences of such differences.

I.   Different perceptions
(Pretty et al. 1995, pp 192)

Aim of the exercise: to better understand that people differ in their perceptions of the world around them

Time: about 15 minutes

Method: game

Materials: Handout A of exercise I (woman's picture) on overhead sheet — Handout B of exercise I, Overhead projector - Whiteboard

Steps:
1. Prepare diagrams of K and H in advance on a flip chart.
2. Show the woman's picture and ask participants what they see.
3. Discuss different perceptions of the same picture and possible reasons. Reflect on possible consequences for design and implementation of development programmes.

4. Show the diagram of 'K' and ask participants what they see. When you get the response show the diagram of 'H' and ask again what they see.
5. Discuss why the diagram of 'H' was easier to recognise. Ask about personal experiences related to differences in perceptions and influencing mechanism.

J.   Nuts game
Idea: J.J. Edney, source unknown

Aim of the exercise: To increase understanding of sustainable and equitable development

Time: about 45- 60 minutes, depending on the number of small groups formed

Method: game

Materials: walnuts or any kind of nut or bean of that size will do, at least 25 nuts per group formed. A few bowls according to the number of groups — whiteboard

Steps
1. Write in advance the goal and rules on a flipchart. The player's goal is to get as many nuts as possible during the game. The rules are:
   a. do not communicate verbally,
   b. players take nuts in any quantity out of the bowl simultaneously using only one hand. This makes a 'round' which takes not more than 10 seconds. In every bowl there are 25 nuts.
   c. The balance left in the bowl is doubled after each round by the facilitator, up to a maximum of 25 nuts.
   d. The game is over when the bowl is empty or after 6 rounds.
2. Tell the participants of the strict adherence to the rules. Explain the goal and rules as written on the flipchart.
3. Play the game. After each round write the number of nuts left in each group on the whiteboard.
4. Discuss what happened after the first game. Ask how many nuts each player has in his/her hands. Usually most groups have emptied their bowl completely after the first round, thus they are unable to continue the game, with a large variety in individually gathered nuts.
5. Play another game, changing the rules: participants are allowed to discuss with each other during the game. Give them 5 minutes to prepare themselves.
6. Play the game again and write down the number of nuts left in each group and, at the end, the total number of nuts collected by each group member.
7. Discuss what happened: the scores but also the processes that took place in the group, attitudes of players, etc. To what extent are issues of equity taken into account? Are gender needs or possible differences in perspectives of men and women considered?

What does the game symbolise? The bowl represents the resource pool, the nuts are the resources. The replenishment cycles (doubling the number left) represent the natural resource regeneration rates; taking the nuts is harvesting behaviour - nuts can be taken according to needs, aspirations, values, etc. Point to the sustainability of resources and equity as well as factors influencing them.

K. Community level study

This exercise can be done in various settings: as field work in a community site, through case studies and through reflection on the participant's own work related to development programmes. Colleagues and/or the men and women of the target group can be involved as well. The more people involved in the study, the more clearly different perspectives become visible.

With respect to case studies, it is advisable to use cases that are familiar to the participants to enable them to better reflect on their own way of working and thinking. Case studies can be found in training manuals or developed by the trainer. Care should be taken with the use of existing case studies: in most cases they need to be adjusted to fit the training and the background of the participants. Programmes of the own organisation could be used as cases as well but with care: critical analysis might be sensitive and prevent the free flow of opinions. We have added two case studies - see Handout A and B of exercise K.

Field work provides a good context for further discussion and reflection, but it requires careful preparation. Depending on the skills and knowledge of the participants more or less attention should be paid to concepts, analysis, tools, methods of data collection and analysis; team work, approaches towards community members, report writing, data presentation, and so on. Role-playing and games can be useful instruments for preparing for the field work. A useful guide is *Participatory Learning and Action, A Trainer's Guide* by Pretty et al., 1995.

As discussed in Part 1 - Section 2, there are several tools for gender analysis. A tool should be selected that fits the training and participants. We found one tool, the Gender Analysis Matrix or GAM (Parker 1993), particularly useful because it focuses on changes within a community related to labour, time, resources, and culture. This framework fits in quite well with the gender wheel which forms the conceptual background of this manual (see handout C of exercise K).

Aim of the exercise: 1. To increase understanding of the condition and position of men and women at community level. 2. To get more insight into different perceptions of men and women regarding their situation and future. 3. To better realise that there are various perceptions of the same situation.

Time: from several hours (case study) to one or more days (field work)

Materials: pen and paper; for case studies, handouts A and B of exercise K, handout C of exercise K, whiteboard

Steps
1. Prepare the method applied: write and/or adapt case studies; prepare field work.
2. Explain the exercise to the participants and prepare them for the work to be done (role plays, games, and discussion on various topics for field work).
3. Form small groups and ask them to answer the following questions as a group.
   a. What are the gender issues within the community according to men and women considering different age groups, classes, castes, religion, and so on?
   b. What are the opinions about these gender issues within the community? What is your opinion?

4. Ask the groups to present the outcomes in the plenary for discussion. Pay attention to the consequences of the different perceptions observed for further development planning. How do the participants assess the potential for addressing gender issues?

For debriefing of field work, the following questions related to the method applied can be relevant for discussion.

- What method helped you to get the best results? What do you mean by best? Why do you feel so?
- What did you learn about involving other staff of your organisation or outsiders in the research, about ways of motivating them, about their attitude or changes in attitude during their involvement, about the effect of their involvement in the research?
- What did you learn about involving the women and men of the community in the research? How did you motivate them to cooperate? How did they react to your research? Did you have to specially consider certain (groups of) people during the preparation and implementation of the research? What were the effects of your research?

A useful method to stimulate discussion is the role play. Ask the participant to prepare a role play about something that went wrong or right during the field work or anything else they consider important to share with others as a learning experience. It could concern the team work, attitudes shown during interviews, seating arrangements, efforts to build rapport, and so on.

HANDOUTS

Handout of exercise H: Overview of development approaches towards women in relation to men
(Williams, et al. 1994, pp 226)

	Welfare	Anti-poverty	Efficiency	Equity	Empowerment
Cause of the problems	Circumstances that are beyond control	Lack of resources, causing low standard of living	Failure by development planners to recognise women's key role in production, and necessity to involve women	Patriarchy, exploitation, subordination, and oppression of women by men	Women's subordination not only by men but as aspect of colonial and neo-colonial oppression
Goals or purpose	To support motherhood as the most important role for women in society- To relieve suffering	To raise production to ensure poor women increase their productivity- To integrate women into development	To ensure that development is more efficient and more effective `Feed the nation'	To gain equity for women in development by grafting gender into the development process	To empower women through greater self-reliance- Building new political, economic and social structures- To challenge/ overcome exploitative structures
Service programmes	Famine relief programmes – Family planning – Nutrition (improving family health, especially of children through maternal care) – Activities to meet Practical Gender Needs	Training women in technical skills – Small-scale income-generating activities to meet basic needs (practical gender needs)	Programme that meet PGN in the context of declining social services. Rely on all 3 roles of women and elasticity of time	Organise to reform structures – To meet SGN in terms of Triple Role	Programmes that address themselves to SGN in terms of Triple Role - through bottom-up mobilisation around PGNs to confront oppression
Type of change	FUNCTIONAL CHANGE (Non-challenging)	FUNCTIONAL CHANGE (Non-challenging)	FUNCTIONAL CHANGE	STRUCTURAL CHANGE (Challenging) Equal Rights/ Opportunities	STRUCTURAL CHANGE (Challenging)
Type of leadership	Strong reliance on authority (patriarchal model of social welfare with the modernisation ideology with roots in colonialism	Consultative - ideological reproduction of values that reinforce patriarchy and women's subordination	Authoritarian/ Consultative. Women seen as resource	Participatory to reform structures – Top-down state intervention to reduce inequality	Enabling, participatory, build solidarity, overcome fear (alternative m/f balanced structures). 'Bottom-up'
Type of service	WELFARE - Assuming women are passive beneficiaries of development.	ANTI-POVERTY - Development (integrating women into development) – Poor women isolated as a category. Recognition of the productive role of women	EFFICIENCY- Policies of economic stabilisation and adjustment rely on women's involvement.	EQUITY - Reforming, liberating – Women seen as active participants in development.	EMPOWERMENT Transformation, liberation Largely unsupported by Government or agencies. Slow steady growth of under financed voluntary organisations.
Period most popular	1950-70, but still widely used	1970s onwards – Still limited popularity	Post 1980s - Now most popular approach (ODA, USAID)	1975-85 - Attempts to adopt during Women's Decade	1975 onwards, accelerated 1980s – Still limited popularity

Handout B of exercise I: seeing Ks and Hs
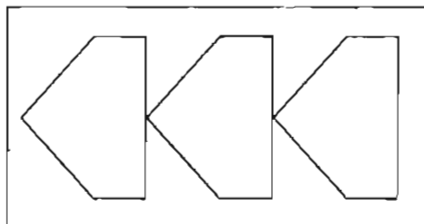(Pretty et al. 1995, pp192

52: SEEING THE Ks OR Hs

✔ **OBJECTIVES**   ▪ To demonstrate how recent events influence the way we see the world
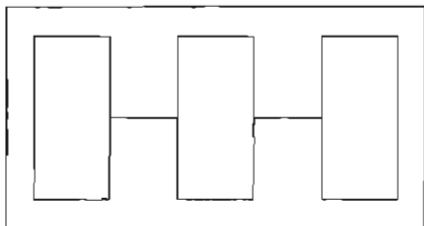
☞ **MATERIALS**   Flipchart/chalk board

🕐 **TIME**   5 minutes

✍ **PROCEDURE**
1. Exhibit this diagram on a flipchart or chalk board. ▶

2. Ask your group: *"What do you see?"* The chances are you will get responses like *"arrows"*, *"three houses on their side"* *"increasing importance to the left"*; *"go to the left"*; etc.

3. When you get the response *"two Ks"*, immediately highlight the two Ks and go on with the exercise by exhibiting the second diagram. ▶

4. Then ask them: *"Now what do you see?"*. Very likely, you will get the response *"two Hs"* immediately. Now ask the group *"Would you have seen the Hs if someone had not first pointed out the Ks?"*

❝ **COMMENTS**   It is best to prepare the diagrams beforehand, as the process of drawing them can reveal the Ks and Hs too soon.

Ask the following questions:

▪ *"Why did you see the Hs more easily than the Ks?"* (You were conditioned by what had just happened: the eye sees, but the mind evaluates).

▪ *"In your work with people, in what ways is your eye seeing one thing and your mind another?"*

▪ *"In your work, have there been occasions when what has recently happened has influenced the way you observed or reacted?"*

Handout A of exercise K: A case study of a village in Western Nepal: the promotion of an income-generating activity
Kamal Rijal

Arukharka (fictitious name) is one of the poorest villages in Nepal. Like many villages, it has low literacy rates and high infant mortality. Most people are Hindus, and Hinduism is the national religion. In this village, men are usually skilled in construction, business, and professional work, and do the planting, water management, and harvesting. Men also participate in formal politics as community representatives. This includes representation of concerns expressed by women's groups. Women have almost exclusive responsibility for raising their children, cooking, cleaning, and other household work. Women also operate a variety of small businesses. In agriculture, women do the weeding, bring food for the men, and help as needed. Water and fuel are usually collected by women and children.

Project Activities
In this community, women have been sewing and doing embroidery for many generations. Traditionally, they sold some products from their homes, but usually the men took most of it to the market to sell. A local-level NGO came to this community and identified their embroidery work as a productive activity that the NGO might support. The women were introduced to a small machine that could help them do their embroidery faster than would be possible by hand. The NGO promised to train them to use the machine and to let them buy it on credit. With the machine, they would be able to produce much more right at home. Increased production from the use of the machine would enable the women to repay their loans within one year. The people here never did have a problem selling their products. The NGO's feasibility studies showed that there would be a market for their goods.

Impact of Project Activities
Women had received training in using the embroidery machine. At the beginning, women were concerned about control over the additional income due to increase. They were also concerned to pay back their debts. The men quickly realised that transporting more goods to the market was difficult and that it took them a lot longer to sell more. They also became uneasy about the women having access to technology and becoming more skilled while they only worked more and harder. The women, on the other hand, felt that they produced more, but did not benefit from this.

Many women had not made their loan repayments. They claimed that the men simply kept the money. The men felt that, after the purchase of supplies, the additional income was insignificant (prices had dropped as well since the market was loaded with these goods), and that, in any event, they deserved additional income since they were working more and harder than before. The distribution of income within the household was one issue that was destined to become a problem. Loans were given to the woman, but it was the man whose workload increased and men received the cash in the market. Initially, the men encouraged the use of the new technology, but their own assumptions about its impact came into question later as the women became more confident.

The Gender Analysis Matrix: What, Why, Who and When?

WHAT   The GAM is a tool for gender analysis of development projects at the community level.

WHY   The GAM is used to determine the different impacts of development implementations on women and men.

The GAM separates out the different impacts on women and men (and other vulnerable groups) so that development practitioners may accommodate the different needs and interests of men and women.

The GAM initiates a learning process that values the perceptions of learners about existing gender relations.

The GAM encourages critical thinking about gender roles and the different values society places on women's and men's labour.

WHO   The analysis is done by a representative group within the community.

Where possible, the group should include women and men in equal numbers. If the culture does not permit women and men to work together, then each gender should meet separately, and the analysis should be shared with the other gender.

WHEN   The GAM can be used in the planning stage, to determine whether potential gender effects are desirable and consistent with programme goals.

The GAM may also be used in the design stage when gender considerations may change the design of the project.

The GAM is particularly useful for expanding the scope of monitoring and evaluation beyond the stated objectives to address broader programme impact.

For monitoring, the GAM can be used to periodically verify expected impacts and identify unexpected results so that they can be addressed.

During evaluation, the GAM can help to determine gender impacts.

Handout C of Exercise K: A case study of a village in Eastern Nepal: supply of potable water
Kamal Rijal

In this community of **Sundarpur** (fictitious name) of 110 families, the women had to walk two kilometres down an incline of 15 degrees on a slippery path to get water from the stream. Twice each day, these women walked down the steep, muddy path carrying empty jerry cans, they filled their cans with water and then carried the 20-litre cans on their backs up the steep hill. Every woman fetched water twice a day, even when it was winter, when she was pregnant or sick, or with her little child whom she could not leave behind alone in the house.

Project Activities
In this village, where a local level NGO had worked for seven years, the women rated their difficulty in getting water as their biggest problem. Men, who never fetch water, rated their problem as their fifth priority.Traditionally, in this culture, it is the men who construct wells for collection of spring water, not the women. A committee for potable water was created, which included women and men selected by the community. A well was constructed 5 km away and water was piped to a big tank near the community, so that the houses were only about 100 metres away from the water tap. Today the water project is completed and potable water is easily accessible to everyone in the community.

Impact of Project Activities
The new water source provided potable water. Once the project was completed, men and children began to fetch water, changing the traditional gender division of labour with regard to water collection. Organisational systems within the community were strengthened as systems for collection of payment for water usage were developed. The community worked out payment for use of the water and agreed that four families would be allowed to use the water free of charge because they could not afford to pay for it. Although the women assumed that they would have to pay for the water, the men paid for it since the job of collecting payments fell to a male member of the committee. The new water source provided greater personal security for women. Also, the women did not have to carry their babies to the source. Since it was close enough, they were able to leave small children at home while they went to fetch water. Men spent more time at home during the project construction phase and later were able to market their skills in water system construction and maintenance.

By government requirement the committee used to attend a district meeting at which men from the communities' committees had ridiculed these men because there were so many women participating in the decision-making.

How to Use the Gender Analysis Matrix

In the project planning and design phase

1. Describe the project in a few sentences.

2. Identify the groups that the project is intended to benefit. Be as specific as possible.

3. Restructure the Matrix to ensure that these groups are represented. Keep the Matrix as simple as possible. Do not add more than two sub-categories as that will make the Matrix very difficult to manage over time. The key is to ensure that the Matrix facilitates a process of analysis, rather than serving as a comprehensive database. Leave out the 'Community' category if it does not reflect the complexity of the community with which you are working.

4. Fill out the Matrix by asking what the project's potential impact is on women's time, labour, physical resources, and social and cultural contexts. Next ask the same questions for the men, the household, and the community.

   The categories provided in the Matrix may be further sub-divided as needed. For example, labour could be household labour (domestic), productive labour (own business), wage labour (paid for work), and unpaid labour (done out of social necessity).

   The question on this category would then be: What effect would the project have on women's household labour, productive labour, wage labour, and non-wage labour?

   The most difficult impact to anticipate is in the sociocultural category. In this case, it is particularly useful to look across categories and across the various levels of analysis to determine the interrelationships.

   As needed, the levels of analysis can also include (depending on the project goals and the community in question) age group, class ethnic groups, or other relevant categories determined by the analysing group.

5. If there is disagreement among the group about the expected impact, it is okay to note all views even if they are contradictory. The contradiction will be addressed in subsequent analysis and resolved on the basis of actual outcomes.

   After all the blocks have been filled in, determine whether the effect listed in each box is desirable or not with respect to your programme's goals.

   If it is consistent with your programme goals, mark it with a minus (-) sign. If you are uncertain, identify it with a question mark (?)

6. Use the signs as a visual picture of the areas where expected impacts will be consistent with programme goals, and areas where impacts may be contrary to programme goals.

DO NOT add up the signs to determine net effect.

The Matrix does not determine questions of equity; it simply separates out the potential impact of a particular activity. In each particular context, it is the analysis (the community group doing the analysis) that decides whether the potential consequences of a particular project are desirable.

7. Consider the effects on those who do not participate in the project. Will they also benefit, or will they lose? What adjustments can be made to prevent a negative result for those who cannot or do not wish to participate?

In the monitoring and evaluation phase

1. Review the analysis and verify the expected impact at least once a month for the first few months of a project, and at least once every three months thereafter.

2. Identify unexpected results so that they may be addressed.

Notes: 1. This tool should not be the sole means of decision-making. It should be used in addition to other standard tools. 2. The completion of the GAM can take two to four hours, especially during the first few analyses. Often it is difficult for women to leave their work for such a long time. In such cases, it is possible to do two categories at a time. The goal is to ensure that both sexes have taken part in the analysis.

Gender Analysis Matrix

Project Objectives

	Labour	Time	Resources	Culture
Women				
Men				
Household				
Community				

1. Are the effects listed above desirable? Are they consistent with programme goals?
2. How will this activity affect those who do not participate?
3. Unexpected results - to be identified during implementation.