

## DAY TWO

## Session 5 Engendering the Logical Framework

### Instructions to Trainers

### SESSION 5

**11:45 – 12:30 Session 5. Engendering the Logical Framework**

**12:30 – 13:00 Exercise 5. Analyze an Engendered Logframe**

**14:00 – 15:15 Exercise 5.**

**15:15 – 15:30 Tea/Coffee Break**

**15:30 – 16:00 Exercise 5.**

**16:00 – 16:15 PAPA**

### OBJECTIVES

By the end of this session, the participants will be able to do the following:

- Identify the key components of the engendered logical framework
- Describe the process behind the engendered logframe

Use overhead 2.5.1 to present the session's objectives

### PROCEDURE

Training techniques: presentation, modified panel technique.

### PRESENTATION

Deliver a clear presentation on engendering the logframe. Sufficient time is scheduled so that participants follow the presentation. Stop for questions as necessary. You will find the information in handout 2.5.1 very useful. Use overheads 2.5.2 through 2.5.15 to support the presentation. Distribute handout 2.5.1. Ask if clarification is needed. (45 minutes)

### EXERCISE 5

**Exercise 5. Analyze an Engendered Logframe.**  
(2 hours)

1. (*experience*) Distribute handouts 2.5.2, 2.5.3 and 2.5.4. Handout 2.5.2 gives clear instructions for the exercise. Go over the instructions with the participants step by step. Ask if any clarifications are needed. Emphasize and remind the participants about the time.
2. Divide the participants into two groups and ask each group to elect a rapporteur. (5 minutes)

Phase 1. Group work (60 minutes)

3. (*experience*) The groups read handout 2.5.3 and work on the first phase of the exercise. The worksheet (handout 2.5.4) can be used to write down their answers.
4. The rapporteurs write down the results of the group work on a flipchart.

Phase 2. Reporting and discussion (55 minutes)

5. Invite the rapporteurs to sit in a semi-circle in front of the audience—they form a “panel” during this exercise. (5 minutes)
6. (*process, generalize*) Each rapporteur presents in five minutes his/her group’s results to the audience in the following sequence: first group A, then B. (20 minutes)
7. (*process, generalize*) After the four reports are over, invite the panelists (the rapporteurs) to discuss among themselves similarities and differences in the designs presented. While they are doing this, ask the audience to take note of questions or comments they would like to convey to the panelists afterwards. Facilitate a discussion with the audience. (10 minutes)
8. (*process, generalize*) Invite the audience to compare the four group results displayed on the flipcharts and discuss them. (10 minutes)
9. (*application*) Invite a few volunteers to share lessons learned during this exercise and how they would apply what they have learned in their work. (5 minutes)
10. Welcome feedback on this session and summarize the results. (5 minutes)

**PAPA AND FORMATIVE EVALUATION**

1. Invite the participants to evaluate the strengths and weaknesses of Day One on handout 1.3.4. (5 minutes) Compile the results and prepare them for presentation and response to the participants during the opening session of Day Three.
2. (*application*) Ask the participants to take some time to jot down on handout 2.5.6 some action ideas they might have as a result of today’s activities. (10 minutes)

**CLOSURE**

- (*application*) Ask the participants, “How will you apply the lessons learned as a result of this session in your job?” Close the day’s activities. (5 minutes)

## DAY TWO

## Session 5 Summary of Overheads

### Objectives

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- Explain and provide example of the engendered logframe
  
- Discuss implications of gender evaluation for FAO

*The Engendered Logframe Approach 2.5.1*

2.5.1

### Example of the Engendered Logframe

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- Engendering the logframe is about identifying and accounting for gender in planning, monitoring, and evaluating research and development work

*The Engendered Logframe Approach 2.5.2*

2.5.2

### The Generic Logframe

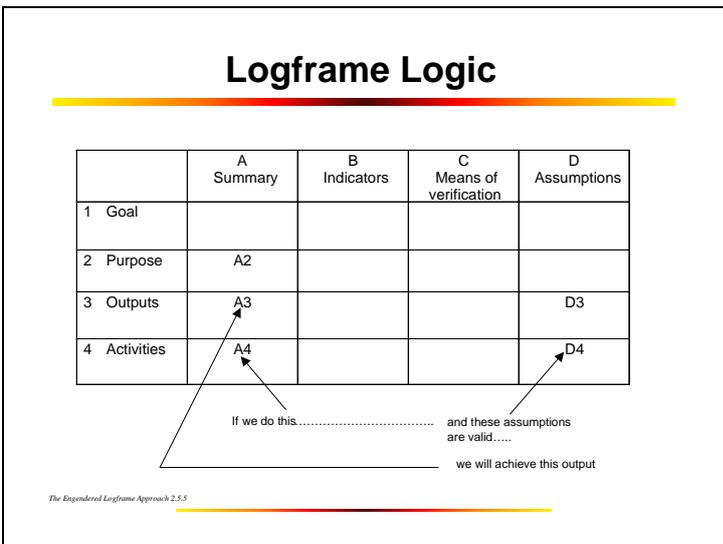
	Narrative summary	Objectively verifiable indicators	Means of verification	Important assumptions
Goal (development objective)				
Purpose (immediate objectives)				
Outputs (components)				
Activities (sub-components)		inputs		

*The Engendered Logframe Approach 2.5.3*

2.5.3

- ### Logical Framework
- ❑ Organizes considerable information in a coherent and concise manner
  - ❑ Project prevented from attempting too many activities with too few resources
  - ❑ Focuses project planners and instructs project evaluators
  - ❑ Logframe is increasingly a “living tool” that anticipates change
  - ❑ Earlier versions of the logframe not to be disregarded
- The Engendered Logframe Approach 2.5.4*

2.5.4



2.5.5

## Experience Suggests

- ✎ Logframe as an existing project management tool can be improved and better used
- ✎ Changes will be incremental, not exponential
- ✎ Optional vs. mandatory gender analysis involves change in process, and therefore changes in individuals/organizational behavior

The Engendered Logframe Approach 2.5.6

### 2.5.6

## Process behind the Engendered Logframe

### Critiques the notion of participation

- ✎ Who participates in projects and why?
- ✎ Are the needs of men and women known and/or responded to?
- ✎ Is there a complementary or competing agenda among beneficiaries?
- ✎ Have participants had input into project monitoring and evaluation?
- ✎ Women discuss as a separate group and together with men (identify/negotiate)

The Engendered Logframe Approach 2.5.7

### 2.5.7

## Engendered Logframe Basics

### Gender analysis in the logframe

- ❑ identifies women's/men's practical and strategic needs in determining goal and purpose (objectives)
- ❑ identifies and uses sex-disaggregated data in indicators and reliable sources of data
- ❑ identifies gender roles and relations and use of participatory methods - beneficiaries are actors, not passive recipients
- ❑ incorporates resources brought to the project by its beneficiaries

The Engendered Logframe Approach 2.5.8

### 2.5.8

## Tool #1: Questions to Guide Engendered Logframe

	Narrative summary	Objectively Verifiable Indicators	Means of Verification	Important Assumptions
Goal	Do gender relations in any way influence the project goal?	What measures can verify achievement of the gender-conscious goal?	Is the data for verifying the goal sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in impact assessment)?	What are the important external factors necessary for sustaining the gender-conscious goal?
Purpose (or Objectives)	Does the project have gender-responsive objective(s)?	What measures can verify achievement of the gender-responsive objective(s)?	Is the data for verifying the project purpose sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in Rapid Rural Appraisal exercises)?	What are the important external factors necessary for sustaining the gender-responsive objective(s)?
Outputs	Is the distribution of benefits taking gender roles and relations into account?	What measures can verify that project benefits accrue to women as well as men, and the different types of women engaged in or affected by the project? Inputs: What goods and services do project beneficiaries contribute to the project? Are contributions from women as well as men accounted for? Are external inputs accounting for women's access to and control over these inputs?	Is the data for verifying project outputs sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in participatory field evaluations)?	What are the important external factors necessary for achieving project benefits (specifically, benefits for women)?
Activities	Are gender issues clarified in the implementation of the project (e.g., in workplans)?	What goods and services do project beneficiaries contribute to the project? Are contributions from women as well as men accounted for? Are external inputs accounting for women's access to and control over these inputs?	Is the data for verifying project activities sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in monitoring the activities)?	What are the important external factors necessary for achieving the activities, and especially ensuring the continued engagement of men and women participants in the project?

*The Engendered Logframe Approach 2.5.9*

### 2.5.9

## Row 1: Goal

	Summary	Indicators	Verification	Assumptions
Goal	Do gender relations in any way influence the project goal?	What measures can verify achievement of the gender-responsive goal?	Is the data for verifying the goal sex-disaggregated and analyzed in terms of gender?  What gender analysis tools will be used (e.g. in impact assessment)?	What are the important external factors necessary for sustaining the gender-responsive goal?

*The Engendered Logframe Approach 2.5.10*

### 2.5.10

## Row 2: Purpose (objectives)

	Summary	Indicators	Verification	Assumptions
Purpose (Objectives)	Does the project have gender-responsive objective(s)?	What measures can verify achievement of the gender-responsive objective(s)?	Is the data for verifying the project purpose sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in Rapid Rural Appraisal exercises)?	What are the important external factors necessary for sustaining the gender-responsive objective(s)?

*The Engendered Logframe Approach 2.5.11*

### 2.5.11

### Row 3: Outputs

	Summary	Indicators	Verification	Assumptions
<b>Outputs</b>	Is the distribution of benefits taking gender roles and relations into account?	What measures can verify that project benefits accrue to women as well as men, and the different types of women engaged in or affected by the project?	Is the data for verifying project outputs sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in participatory field evaluations)?	What are the important external factors necessary for achieving project benefits (specifically, benefits for women; youth)?

The Engendered Logframe Approach 2.5.12

#### 2.5.12

### Row 4: Activities

	Summary	Indicators	Verification	Assumptions
<b>Activities</b>	Are gender issues clarified in the implementation of the project (e.g., in workplans)?	<b>Inputs:</b> What goods and services do project beneficiaries contribute to the project? Are contributions from women as well as men accounted for? Are external inputs accounting for women's access to and control over these inputs?	Is the data for verifying project activities sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in monitoring the activities)?	What are the important external factors necessary for achieving the activities, and especially ensuring the continued engagement of men and women participants in the project?

The Engendered Logframe Approach 2.5.13

#### 2.5.13

### Exercise 5 & 6

#### Exercise 5

- Analyze an engendered logframe
- Apply Tool #1 to an existing project

#### Exercise 6

- Draft an engendered logframe

The Engendered Logframe Approach 2.5.14

#### 2.5.14

## Try it yourself



- **Apply Tool #1 to an existing project and draft an "engendered" logframe**
- **Take note of any opportunities and constraints you find in preparing the engendered logframe**

The Engendered Logframe Approach 2.5.15



2.5.15

# Engendering the Logical Framework

## (summary of presentation)

### Origins and Relevance of the Logical Framework

The logical framework or *logframe* is an analytical tool used to plan, monitor, and evaluate projects. It derives its name from the logical linkages set out by the planner(s) to connect a project's means with its ends. The logframe is only one monitoring and evaluation tool and its use does not pre-empt the use of other evaluation tools such as priority-setting or rate-of-return analysis.

The logframe was originally developed by the United States Department of Defense, and adopted by the United States Agency for International Development in the late 1960s. Since then, it has been applied and modified by many bilateral donors, including Germany, the United Kingdom, the European Union, Canada, and Australia.

Donor promotion of the logframe led to national and international agricultural research and development (R&D) organizations incorporating the logframe into long- and short-term program and project planning and reporting. For instance, at the Kenya Agricultural Research Institute (KARI), completion of a logframe is currently required for at least three-quarters of all research proposals submitted to donors each year. As well, KARI uses the logframe as a workplan to structure and monitor its project activities in a continuous manner.

Despite the significance and widespread use of the logframe in R&D project management, there are some important problems associated with it, which are addressed in this paper. One difficulty is that a logframe requires some effort to master the logic that relates the goal, objectives, outputs, activities, and inputs of the project. For this reason, training workshops on the logframe are widespread and donors often offer instructional information to complete the matrix according to their specifications. While avoiding advancing any one particular template, this paper aims to draw the reader's attention to some simple ways in which to understand what the logframe is, and why it is relevant to monitoring and evaluating projects.

A second problem with the logframe, and the key issue addressed in this paper, is that a logframe is misleading when it has not been properly analyzed to fit a project intended to be participatory in nature, and therefore responsive to social equity issues, such as gender relations. ***Engendering the logical framework is about identifying and accounting for the gender issues implicit in the planning, monitoring, and evaluation of research and development projects.*** The conventional use of the logframe warrants critique because it has often been "gender blind" with insufficient attention paid to the nature of the process behind its preparation and use. Hence, this paper describes the potential of the logframe for R&D monitoring and evaluation, taking into account gender roles and relations.

## What is a logframe?

A generic project logframe consists of a four by four matrix (Table 1). From top to bottom, the rows are labeled as follows: goal, purpose (also referred to as objectives), outputs, and activities.

**Table 1: The Generic Logical Framework Matrix**

	Narrative summary	Objectively verifiable indicators (OVIs)	Means of verification (MOVs)	Important assumptions and Risks
Goal <i>(or development objective)</i>				
Purpose <i>or immediate objective(s)</i>				
Outputs				
Activities		Inputs		

The *goal* of the project is stated in broad terms. It is an aim that the project anticipates reaching and it must be related to a specific national development priority. The second row of the logframe lists the objectives, or *purpose* of the project. The third row of the logframe encompasses its *outputs*, or the results anticipated by the project. Finally, the fourth row is a list of project *activities* that relate to each of its outputs.

The four columns are labeled as follows: the narrative summary, objectively verifiable indicators, means of verification, and assumptions. In the first column, the *narrative summary* describes the project’s goal, purpose, outputs and activities. In the second column are the objectively verifiable indicators for each level of the project. Indicators are quantitative and qualitative measures of tangible project achievement. These can include process, product (input/output), or impact measures. Indicators must also specify quantity, quality, and timing. These measures must be capable of being substantiated, and the sources of information for this task are indicated in the third column, referred to as *means of verification*. In the fourth and final column are the critical *assumptions*. These are contextual and content-related factors that influence the project.

Finally, it is noted that at the level of activities, under the second column, the logframe requires not indicators, but the identification of *inputs* or goods and services required for project implementation, and without which the project cannot achieve its activities, outputs, purpose, and goal. The importance of this statement of inputs will be taken up below.

In project planning, a logframe is typically shaped by working “top-down” through the matrix. First, the ultimate goal is defined, followed by the purpose of the project, then the outputs needed to achieve the goal, and finally, the activities and inputs needed to achieve the outputs. Only one goal and purpose should be stated for each project or the project will risk being unfocused. Normally, however, there are multiple activities and outputs in a project, and these are reflected in the logframe.

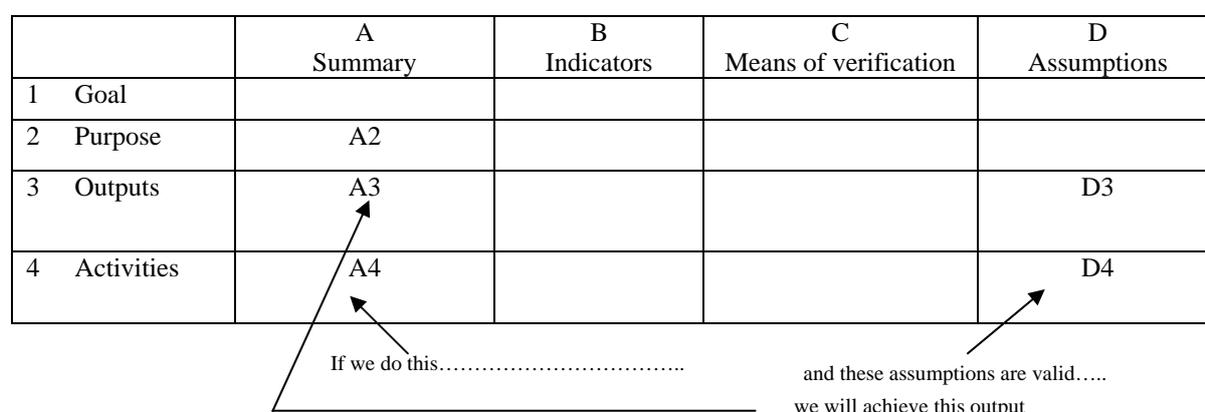
To help define the columns of the logframe further, Farrington and Nelson (1997) suggest questions to be asked when determining the goal, purpose, outputs, and activities of the logframe (Table 2). Note that when the component of inputs is reached (cell B4), the question to be asked is: “what resources are required to achieve it (i.e., the activity)”?

**Table 2: Defining the Logframe Columns**

<b>Summary A</b>	<b>Indicators B</b>	<b>Means of Verification C</b>	<b>Assumptions D</b>
What does the project want to achieve?	How can we tell if we have achieved it?	Where can we get information that will tell us this?	What else must happen if it is to succeed?

Source: Farrington and Nelson (1997)

One aspect of using the logframe is knowing how to test its underlying logic. This is done by reading the logframe from bottom to top to analyze the coherence of its arguments (see Figure 1). For example, the linkages between the components of the matrix would be read as follows: if activities (as listed in cell A4) are implemented, and the relevant assumptions are valid (cell D4), then the project will achieve the outputs (cell A3). If outputs are achieved and the related assumption remain valid (cell D3), the project will achieve its purpose (cell A2). If the purpose is achieved and the related assumption holds (cell D2), then the overall goal is achieved (A1). The middle columns (B and C) show what and how to measure the achievement of the summary at each level. These are indicators and means of verification, respectively. If at any point, the statements of inputs, activities, outputs, purpose, or goal are not clearly related, or if essential information is missing, the logframe will fail in its logic.



**Figure 1: Relationship of Cells in the Rows of the Logframe (from Farrington and Nelson 1997)**

Reading the logframe from the bottom up to test if its logic still holds true given the realities of project implementation is an essential step in project management. This aspect of project monitoring, and the reports that document any necessary changes to the logframe cells or logic, are then examined in depth during the evaluation process. Specific questions to guide this examination include:

How did the logframe change, and over what period of time did this change occur? (e.g., if certain inputs to the project were not forthcoming within a designated period of time, how did this affect the scheduled activities, and how did this affect the project outputs and achievement of its objectives?)

What were the most critical cells in the logframe? How did change in these cells affect the overall logic and impact of the project?

What new assumptions arose due to changes in the project activities, outputs, purpose, or even its goal?

## The Logframe as a Learning Process

Compared to most other project management tools, the logframe has the potential to organize a considerable amount of information in a coherent and concise manner. Indeed, the completion of the logframe requires that early in the planning process a project does not attempt too much with too few resources. The logframe has a distinct advantage of focusing project planners, and subsequently, its implementers and evaluators (Coleman 1987; Sartorius 1996).

Elliott (2000) suggests that the logframe also provides a link between the macro-levels and micro-fuctions of a project. Policy translated into management practice lies in the interface of rows A and B, while rows B and C represent project design. Rows C and D implicate project delivery and strategy. The logframe helps to interpret policy through its management (implementation) while at the same time providing information, guidance, decisions, or complementary inputs to get buy-in and consensus of those who will be responsible for delivering the project.

The study of implementation informs us, however, that very few R&D projects ever, and perhaps should, adhere strictly to their original plans (Tola, Gijsbers and Hambly Odame, 2001). In recent practice, the logframe is used with the expectation that some of its components may require adjustment. In other words, an annual or seasonal rolling plan or workplan summarized by a logframe becomes a “living tool” for project management. In such cases, the goal and purpose of the logframe vary little from year to year, although outputs, activities, and inputs may be adapted to fit a project’s changing context. New indicators and means of verification may also arise in the course of project implementation. However, a word of caution is needed on the adjustment of the logframe. Specifically, earlier versions of the logframe should not be discarded. They are not useless, but serve as important benchmarks for project evaluation.

One major disadvantage associated with the logframe is that the tool has often been used without sufficient attention to the process of debating and negotiating the project with its stakeholders and beneficiaries. Since the logframe becomes the main summary of the project and is subsequently used for monitoring and evaluating the project, there is a strong risk that participatory inputs into project formulation will be lost in the construction and text of the logframe itself. An iterative, participatory process of assessing needs and brainstorming various components of the logframe/project is needed. To strengthen the accountability of the project to its participants, the critical components of the logframe to be reviewed include the project’s inputs (resources) and anticipated outputs (results).

Let us consider one example of how improving the process of developing a logframe can strengthen the management of the R&D project. Firstly, note that the final column of the logframe captures the ‘assumptions’ of a project. This column tends to frustrate project planners and evaluators because the assumptions behind program and project planning and its implementation could be limitless. One might state any number of uncertainties that influence the achievement of a project, including negative and unforeseen trends in weather, economy. or political crises, etc. However, the real “killer assumptions” that exist in project development are often less drastic but equally influential. These obstacles can include mismanagement of the project, insufficient resources (including time, human, physical, and

financial resources) and lack of participation or breakdown in communication with project stakeholders and beneficiaries. Attention to the process behind constructing a logframe leads to early identification of the “killer assumptions” and action taken to address them. This makes the logframe more realistic and achievable.

## Gender Analysis and the Logframe

Opening up the logframe to review by project stakeholders and beneficiaries is only part of making the tool more appropriate for participatory projects. The logframe must also incorporate an awareness of the social relations that are intrinsic to project implementation, monitoring, and evaluation. In particular, two common assumptions must be critiqued. One is that participatory projects benefit both women and men, and the other is that women are generally a homogeneous social group. More than three decades of gender analysis in research and development work informs us that neither of these assumptions is true.<sup>1</sup> The task is to converge gender analysis and the logical framework to improve gender equity in R&D projects.

An *engendered logframe* requires that the process of planning a project, as well as each component of the logframe matrix, be seen through a “gender lens.” This lens is informed by gender analysis, which is a methodology to investigate the socially constructed differences between men and women, and between women themselves (Moser 1993; Goetz 1997). These differences determine the extent to which men and women vary in their access to and control over resources and encounter different constraints and opportunities in society, whether it is at the level of the household, community, or state. Established patterns of gender inequality and inequity can be exposed, explored, and addressed through gender analysis. (*Note: an example of a logframe before and after it is engendered will be used in Exercise 5*).

Incorporating gender analysis in the project management process requires that it be clearly reflected in the logframe. In effect, preparation of an engendered logical framework matrix involves project planners, stakeholders, and beneficiaries in analyzing gender relations and addressing questions at each level of the framework (Table 3). This analysis takes place not only once during project start-up, but throughout the course of monitoring and evaluation, keeping in mind that the logframe is both adjustable and applicable to long-term project management.

Table 3: Questions for Engendering the Logframe

	<b>Narrative summary</b>	<b>Objectively verifiable indicators (OVIs)</b>	<b>Means of Verification (MOVs)</b>	<b>Important assumptions and Risks</b>
<b>Goal</b> <i>(development objective)</i>	Do gender relations in any way influence the project goal?	What measures can verify achievement of the gender-responsive goal?	Are the data for verifying the goal sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in impact assessment)?	What are the important external factors necessary for sustaining the gender-responsive goal?
<b>Purpose</b> <i>or immediate objective(s)</i>	Does the project have gender-responsive objective(s)?	What measures can verify achievement of the gender-responsive objective(s)?	Are the data for verifying the project purpose sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in Rapid Rural	What are the important external factors necessary for sustaining the gender-responsive

<sup>1</sup> For further information on gender analysis, the reader is referred to the many excellent toolkits and resource materials available, particularly in the area of agricultural R&D, including Wilde (1998), FAO (2000), Fong and Bhushan (1996), ISNAR (1996), and Poats et.al. (1988).

			Appraisal exercises)?	objective(s)?
<b>Outputs</b>	Is the distribution of benefits taking gender roles and relations into account?	What measures can verify whether project benefits accrue to women as well as men, and the different types of women engaged in or affected by the project?	Are the data for verifying project outputs sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in participatory field evaluations)?	What are the important external factors necessary for achieving project benefits (specifically, benefits for women)?
<b>Activities</b>	Are gender issues clarified in the implementation of the project (e.g., in workplans)?	<p><b>Inputs:</b></p> <p>What goods and services do project beneficiaries contribute to the project?</p> <p>Are contributions from women as well as men accounted for?</p> <p>Are external inputs accounting for women's access to and control over these inputs?</p>	Are the data for verifying project activities sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in monitoring the activities)?	What are the important external factors necessary for achieving the activities and especially ensuring the continued engagement of men and women participants in the project?

The process behind the engendered logframe implicates the critique of the notion of 'participation' in R&D planning and activities (Guijt and Shah 1998). One must ask: Who participates in project development, implementation and evaluation, and why? Are the needs of women and men both known and responded to in the project? Did women and men (or certain groups of women) have a complementary or competing agenda during project formulation or delivery? Have women and men both been actively involved in project monitoring and evaluation? Was there an intention to consult women, both as a separate group as well as in the presence of men, during the discussions? Such questions will determine the extent to which the project brings a gender-responsive approach to its work.

Therefore, engendering the logframe recognizes that both male and female participants are seen as active, rather than passive beneficiaries of the project. In other words, participants are social agents who bring to the project their own agenda, constructive or destructive, their own resources and knowledge, as well as their own interpretation of activities. This awareness can be reflected in the logframe in various ways. For instance, project "inputs" (cell B4) must reflect the resources brought to the project by its participants. These may be expressed as quantifiable goods and services such as units of labor.

Another example of recognizing project participants as social agents takes into account the complementary and competing knowledge of women and men. In the logframe this is reflected in the types of activities prioritized in the project. For example, in an agricultural research project, male farmers often encourage the project to focus on crops or animals that they control (e.g., industrial crops or grade cattle). In contrast, women farmers may prefer activities from which they can directly generate income (e.g., sale of food crops or poultry). Possibly, both types of activities are included in the logframe and reported on through use of appropriate indicators and means of verification. Similarly, complementary gender activities may be reflected in the logframe whereby women and men share control of agricultural products (e.g., women selling milk and men selling meat). Again, suitable indicators, means of verification, and assumptions are designated for these complementary gender roles with a recognition that "women" themselves are not necessarily a homogeneous social group.

In future, research and development organizations can be expected to use the logical framework as a tool not only for summarizing complicated project information, but also for making this information, and its origins, more accountable to project beneficiaries.

## Conclusion

Engendering the logframe is a practical way in which project planning, monitoring, and evaluation connects with gender analysis to strengthen the benefits of research and development for disadvantaged women and men. The logframe can be a useful and durable tool for project management, but a gender-blind logframe will counteract project performance and fail to report gender-related achievements.

More effective and efficient ways to evaluate research and development activities are called for, but the experience of the engendered logframe suggests that improvements can be made to existing project management tools and procedures, including making them more responsive to gender issues. The challenge lies in ensuring the logframe is a living tool that strengthens communication and accountability in the project to its beneficiaries and stakeholders.

## References

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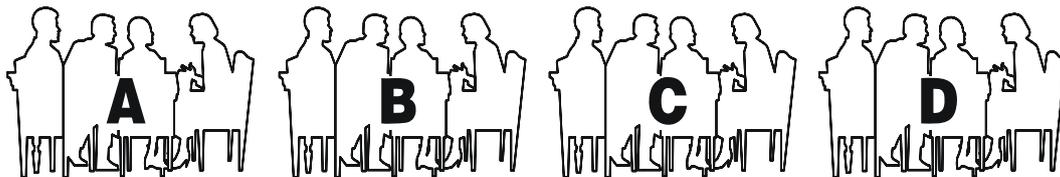
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## Exercise 5: Analyze an Engendered Project Logframe

(using the “modified panel” technique)

### Phase 1. Group work (60 minutes)

1. Form four groups.



2. Each group elects a rapporteur.
3. Each group reads the “before and after” logframe in handout 2.5.3 “**Case Study: Maize Improvement toward Striga Resistance in sub-Saharan Africa**” Be sure to read the original logical framework carefully and then the review team’s comment on this project. Finally, read carefully the revised “engendered logframe” for the project, noting the differences between the two logframes.
4. Each group performs the following activities:
  - a. Discuss and answer the questions in Column A (narrative summary **only**) of Tool #1 for the Engendered Logframe (handout 2.5.4). This tool is a checklist which can be used to guide the examination of a project logframe.
  - b. From a gender perspective, is there a “killer assumption” in the original logframe?
  - c. Examine the revised engendered logframe for this project. What do you think are the three key improvements in it? Identify at least one other improvement that can be included in the engendered logframe.
5. The rapporteurs compile the group’s responses to the questions on flipchart paper and prepare to present their groups’ results.

### Phase 2. Reporting and discussion (55 minutes)

6. The rapporteurs sit in a semi-circle in front of the audience—they form a “panel” during this exercise. (5 minutes)
7. Each rapporteur presents in five minutes his/her group’s results to the audience in the following sequence: first group A, then B, C, and D. (20 minutes)
8. After the four reports are over, the panelists (the rapporteurs) discuss among themselves similarities and differences in the results. While they are doing this, ask the audience to take note of questions or comments they would like to convey to the panelists afterwards. Facilitate a discussion with the audience. (10 minutes)
9. The audience is invited to compare the four group results displayed on the flipcharts and discuss them. (10 minutes)

10. Volunteers are asked to share the lessons learned during this exercise and their relevance to their work. (5 minutes)
11. The trainer ends the exercise by summarizing the results. (5 minutes)

## Exercise 5: Case Study: Maize Improvement toward Striga Resistance in sub-Saharan Africa

A project is submitted entitled “Maize Improvement toward Striga Resistance in sub-Saharan Africa.” The project underwent preliminary review and the report follows. The review team has asked the project planners to re-think the project to make it more responsive to gender issues in maize production. The project is also expected to meet the goals of sustainability, environment, and food security.

The original project is summarized in the following logical framework:

**Project name: Maize Improvement toward Striga Resistance in sub-Saharan Africa**

<b>Narrative summary</b>	<b>Objectively verifiable indicators (OVIs)</b>	<b>Means of verification (MOVs)</b>	<b>Important assumption and risks</b>
<b>Goal:</b> 1. Agencies use new maize varieties in striga-infested areas of sub-Saharan Africa	1.1 10 projects using new varieties and extension service recommendations by 12/2005  1.2 Average yields increased by 20% compared to non-striga projects by 2007	1.1. Documentation, extension bulletins, national agricultural surveys	Price policies, infrastructure, and extension support spread use of technology
<b>Purpose:</b> 1. Striga-resistant maize varieties created for use in sub-Saharan Africa	1.1 Production of maize in striga-infested areas increased by 40% by 12/2005	1.1. On-farm research studies: End-of project research reports	<b>(Purpose to Goal)</b> Funds and mechanisms available to adapt maize varieties for local production  Farm inputs, including tools and fertilizers available on local market
<b>Outputs:</b> 1. Striga-resistant maize varieties identified  1. Seed multiplication: capacity of selected sub-Saharan seed companies increased  2. Striga research capacity of selected sub-Saharan research institutes increased  3. Information network for striga researchers established	1.1 2 hybrid, 2 composite, and 4 open varieties identified by 12/2003  2.1 National seed company producing 2000 mt of certified maize annually by 12/2005  3.1. 2 maize breeders, 2 weed scientists, 1 agronomist, and 1 plant biochemist trained by 2/2005  4.1. Research methods/results disseminated through semiannual net-work reports and conferences from 2002-2004	1.1. Research reports, peer reports, publications  2.1 Seed company records, monitoring mission reports  3.1 Project progress reports, training records, institute personnel records  4.1 Network newsletters and mailing lists, reports on conferences	<b>(Output to Purpose)</b> Research approach remains most feasible means of reducing losses from striga infestation  Research program is well managed and provides peer review  National seed company functioning at 80% capacity  Trained staff continue to work for research project
<b>Activities:</b> 1.1. Obtain hybrid/open lines	<b>Inputs/Resources:</b> Technical assist. researchers 4.5	1.1. Research pro-posals, peer review plan,	<b>(Activity to Output)</b> Constraints have been adequately analyzed and

1.2. Plant test plots	progr. leadership	0.6	project disbursement records	researchable problems identified
1.3. Harvest and measure yields	network coord.	0.2		
1.4. Analyze and report results	peer reviewers	0.4	2.1 Project planning and documents and disbursement records	Peer reviewers competent and process is timely
	Equipment/supplies	2.3		
2.1. Institutional assessment	Operating funds	0.9	3.1 (same as above)	Results from requisite research available
	<i>Total</i>	<i>8.9</i>		
2.2. Define equipment needs	Time frame: 2002–2005		4.1 (same as above)	Research program funding is for 8-10 years
2.3. Procure and install equipment				
3.1. Training assessment				Seed company continues to have good management
3.2. Identify trainees				
3.3. Conduct training				Qualified researchers available for advanced training
4.1. Form secretariat				
4.2. Establish membership				Striga researchers willing to join cooperative network
4.3. Produce newsletter				
4.4. Conduct conferences				
4.5. Publish findings				

Source: Example of a Project Logframe by D. McLean for Team Technologies (Monitoring and Evaluation Sourcebook, ISNAR, 1989)

## Report of the Review Team<sup>2</sup>

The review team acknowledges that Striga has a devastating impact on cereal crops in Africa; therefore, efforts to abate Striga infestation will potentially have a significant impact on household food security and income generation for small-scale farmers.

Striga is a parasitic seed plant which penetrates the roots of other plants, including crops such as maize, sorghum, and rice, diverting essential nutrients from them and stunting their growth. Striga spreads rapidly in areas of low soil fertility. Lack of crop rotation, crop monocultures, and desertification exacerbate Striga infestation.

The review team was aware that Striga results in crop losses of up to 70% (4.1 million tonnes of cereal) among small-scale farmers in sub-Saharan Africa. Economic losses caused by Striga infestations in Africa are estimated at US \$7 billion annually. The Sahelian region is most adversely affected. The countries incurring the greatest crop losses are Burkina Faso, Cameroon, Mali, Nigeria, Sudan, and Togo.

Breeding Striga-resistant varieties of cereal crops such as maize is an option to increase crop yields in sub-Saharan Africa. Increased production could potentially increase incomes, food security, and nutrition in a continent where almost 530 million people depend directly on the land for their living.

The review team recognized that the success of this project will depend on effective technology transfer, and most importantly, on involving local communities in all stages of production and utilization of this new tool. Other factors mentioned in this review that must be taken into consideration include poor weather; too few roads, vehicles, and telephones; weak institutional capacity within governments and official agricultural agencies; and devastating regional and ethnic conflicts.

<sup>2</sup> Helen Hambly Odame (ISNAR Research Officer) made up this case based on information from the International Development Research Centre ([www.idrc.ca](http://www.idrc.ca)), the International Institute of Tropical Agriculture ([www.cgiar.org](http://www.cgiar.org)) and World Bank (<http://www.worldbank.org/afr/findings/english/find46.htm>).

It was also recognized that women are the food producers in sub-Saharan Africa, and the constraints facing women farmers have been shown to be obstacles to progress in agricultural development. These include women's lack of access to land, credit, and cash (to purchase improved seeds), and socio-economic barriers to growing cash crops, which are typically managed by men. Women have lower rates of access to fertilizer and manure, agricultural education and extension services, and markets.

One of the reviewers had completed a review for the World Bank on dissemination of agricultural research findings in the Sahelian region. He described the difficulties associated with defining the headship of farming households as men were reported as heads even when they had long since migrated from rural areas. The reviewer quoted the following findings and conclusions of the study:

- “Ministry of Agriculture officials generally do not consider female-headed households as important, are unaware of the significant percentages of de facto female-headed households, and so ignore them.
- De facto female heads are deprived of resources and revenues that are earmarked for heads of households.
- Targeting of extension and other services should depend on the relative importance of the various social groups in agricultural production and on their current access to extension, resources, and benefits. De facto female-headed households in particular should not be neglected.”

The review team returned the logframe to the project planners with these comments. They asked the planners to ensure that their proposal was made more responsive to gender issues and to take into account their agency’s goals of sustainability, environment, and food security.

## **Revised Project and Engendered Logframe**

The members of the project discussed the review team’s response to their proposal. Some of the researchers on the project did not feel that as maize breeders they should be held accountable for technology transfer, rural extension, and gender issues. In the end, the project planners agreed to seek the assistance of specialists to help them with these issues, and to make their proposal more gender responsive. This resulted in the following revised and “engendered” logframe for the project.

## (REVISED) Project name: Maize Improvement toward Striga Resistance and Increased Food Security in sub-Saharan Africa

Narrative summary	Objectively verifiable indicators	Means of verification	Important assumption
<p><b>Goal:</b></p> <p>1. Agencies use new maize varieties in striga-infested areas of sub-Saharan Africa to increase food security.</p>	<p>1.1 10 projects using new varieties and extension service recommendations by 12/2005</p> <p>1.2 Average yields for resource-poor households increased by 20% compared to non-striga projects by 2007</p>	<p>1.1 Documentation, extension bulletins, national and district development plans, national agricultural surveys (including intra-household data), socioeconomic impact assessments; nutrition surveys; press/ media releases</p>	<p>Price policies, infrastructure, extension support and resource-poor farmer willingness to spread use of technology.</p>
<p><b>Purpose:</b></p> <p>1. Striga-resistant maize varieties created for use in sub-Saharan Africa</p>	<p>1.1 Production of maize in striga-infested areas increased by 40% by 12/2005</p> <p>1.2 40% of resource-poor households affected by striga infestation in maize are using new varieties by 2005</p>	<p>1.1 On-farm research studies: end-of project research reports</p> <p>1.2 Adoption surveys that include both male- and female-headed households</p> <p>1.3 Profile of benefits, including gender analysis (including results on domestic and market use of striga-resistant maize)</p>	<p><b>(Purpose to Goal)</b></p> <p>Funds and mechanisms available to adapt maize varieties for local production</p> <p>Farm inputs, including tools and fertilizers, available on local market</p> <p>Male, female, and child labor inputs required for maize production remain unchanged</p>
<p><b>Outputs:</b></p> <p>1 Striga-resistant maize varieties identified with farmer participation and knowledge</p> <p>2 Seed multiplication: capacity of selected sub-Saharan seed companies and local distribution systems increased</p> <p>3. Striga research capacity of selected sub-Saharan research institutes increased</p>	<p>1.1 hybrid, 2 composite, and 4 open varieties identified by 12/2003</p> <p>2.1 National seed company producing 2000 mt of certified maize annually by 12/2005</p> <p>2.2 Alternative seed distribution systems assessed with NGO/women/youth group involvement</p> <p>3.1 maize breeders, 2 weed scientists, 1 agronomist, and 1 plant biochemist trained by 2/2005</p>	<p>1.1 Research reports, peer reports, publications</p> <p>2.1 Seed company records, monitoring mission reports; field and NGO reports; farmer focus group reports</p> <p>3.1 Project progress reports, training records, institute personnel records; NGO reports; field visit reports</p>	<p><b>Output to Purpose)</b></p> <p>Research approach remains most feasible means of reducing losses from striga infestation</p> <p>Research program is well managed and provides peer review</p> <p>National seed company functioning at 80% capacity</p> <p><b>(Trained staff continue to work for research project</b></p>

<p>4 Information network for striga researchers established</p> <p>5 Research/extension/farmer linkages for new variety assessed and operational</p>	<p>4.1 Research methods/results disseminated through semiannual network reports and conferences from 2002-2004</p> <p>4.2 At least 2 reports accessible to farmers (in local vernacular)</p> <p>5.1 At least one annual consultation with researchers, extensionists, and farmers from 2002-05</p> <p>5.2 At least 2 farmer field schools/ extension centers include modern/traditional knowledge of Striga in their curricula</p>	<p>4.1 Network newsletters and mailing lists, reports on conferences; NGO reports</p> <p>5.1 Workshop reports; farmer field school visits; focus group reports</p>	<p>Extension staff continue to work in affected areas</p> <p>NGOs/women/youth groups identified and willing to collaborate with project</p> <p>Maize remains an important food and cash crop.</p>
<p><b>Activities:</b></p> <p>1.1 Obtain hybrid/ open lines</p> <p>1.2 Assess farmer needs &amp; knowledge</p> <p>1.3 Plant test plots (include plots managed by male and female farmers)</p> <p>1.4 Harvest and measure yields</p> <p>1.5 Analyze and report results</p> <p>2.1 Institutional assessment (including stakeholder analysis)</p> <p>2.2 Assess alternative means for striga resistant seed multiplication and distribution systems (e.g., NGO seed exchanges)</p> <p>2.3 Define equipment needs</p> <p>2.4 Procure and install equipment</p> <p>3.1 Training assessment</p> <p>3.2 Identify trainees</p> <p>3.3 Conduct training</p> <p>4.1 Form secretariat</p> <p>4.2 Establish membership</p> <p>4.3 Produce newsletter</p> <p>4.4 Conduct conferences</p> <p>4.5 Publish findings</p> <p>5.1 Conduct meetings/ focus groups with farmers; field schools; women &amp; youth groups</p> <p>5.2 Identify farmers' indigenous knowledge of Striga and maize cropping system</p>	<p><b>Inputs/Resources:</b></p> <p>Technical assist. researchers 4.5</p> <p>progr. leadership 0.6</p> <p>network coord. 0.2</p> <p>peer reviewers 0.4</p> <p>Workshops 0.5</p> <p>Equipment/supplies 2.3</p> <p>Operating funds 0.9</p> <p><i>Sub-total</i> 8.9</p> <p><b>In-kind contributions:</b></p> <p>Extension services 0.2</p> <p>Farmer time spent in meetings; labor in on-farm trials 0.5</p> <p>Manure; water; local transport 0.3</p> <p><i>Sub-total</i> 1.0</p> <p>Time frame: 2002–2005</p>	<p>1.1 Research proposals, peer review plan, project disbursement records, farmer needs assessment</p> <p>2.1 Project planning and documents (including stakeholder analysis report), disbursement records, audit</p> <p>3.1 (same as above)</p> <p>4.1 (same as above)</p> <p>5.1 Records of on-farm visits or meetings with extensionists and farmers' organizations</p> <p>5.2 Participatory monitoring and evaluation report</p>	<p><b>(Activity to Output)</b></p> <p>Constraints have been adequately analyzed and researchable problems identified</p> <p>Peer reviewers competent and process is timely</p> <p>Results from requisite research available</p> <p>Research program funding is for 8-10 years</p> <p>Seed company continues to have good management</p> <p>Qualified researchers available for advanced training</p> <p>Striga researchers willing to join cooperative network</p> <p>Research and extension staff/organizations willing to work together</p> <p>Researchers and extensionists are willing to work cooperatively with male and female farmers</p>



## Tool #1 Engendering the Logframe

	<b>Narrative summary</b>	<b>Objectively Verifiable Indicators</b>	<b>Means of Verification</b>	<b>Important Assumptions</b>
<b>Goal</b> <i>(development objective)</i>	Do gender relations in any way influence the project goal?	What measures can verify achievement of the gender-responsive goal?	Are the data for verifying the goal sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g. in impact assessment)?	What are the important external factors necessary for sustaining the gender-responsive goal?
<b>Purpose</b> <i>immediate objective(s)</i>	Does the project have gender-responsive objective(s)?	What measures can verify achievement of the gender-responsive objective(s)?	Are the data for verifying the project purpose sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in Rapid Rural Appraisal exercises)?	What are the important external factors necessary for sustaining the gender-responsive objective(s)?
<b>Outputs</b>	Is the distribution of benefits taking gender roles and relations into account?	What measures can verify whether project benefits accrue to women as well as men, and the different types of women engaged in or affected by the project?	Are the data for verifying project outputs sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in participatory field evaluations)?	What are the important external factors necessary for achieving project benefits (specifically, benefits for women)?
<b>Activities</b>	Are gender issues clarified in the implementation of the project (e.g., in workplans)?	<b>Inputs:</b> What goods and services do project beneficiaries contribute to the project? Are contributions from women as well as men accounted for? Are external inputs accounting for women's access to and control over these inputs?	Are the data for verifying project activities sex-disaggregated and analyzed in terms of gender? What gender analysis tools will be used (e.g., in monitoring the activities)?	What are the important external factors necessary for achieving the activities, and especially ensuring the continued engagement of men and women participants in the project?







## Strengths and Weaknesses

### List three strengths of Day Two

1.
2.
3.

### List three weaknesses of Day Two

1.
2.
3.

### Suggestions for improving the workshop

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***DAY THREE***



# Gender Analysis for Monitoring and Evaluation: The Engendered Logframe Approach

## DAY THREE — Overview

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### Objectives

By the end of this day, the participants will be able to do the following:

1. Construct an engendered logframe for a FAO project.
2. Plan actions for future activities in gender evaluation (participant action plan).
3. Evaluate the workshop.

### Handouts

- 3.6.1 Overview of Day Three
- 3.6.2 Tentative Schedule of Day Three
- 3.6.3 Session 6: (summary of presentation).
- 3.6.4 Exercise 6
- 3.6.5 Exercise 6. Worksheet a
- 3.6.6 Exercise 6. Worksheet b
- 3.6.7 Action Planning-Final Stage
- 3.6.8 Final Evaluation

### Overheads

- 3.6.1 Objectives of Day 3
- 3.6.2 Schedule of Day 3
- 3.6.3 Objectives of Session 6
- 3.6.4 Analyzing the Engendered Logframe
- 3.6.5 Steps
- 3.6.6 Other Considerations
- 3.6.7 Exercise 6
- 3.6.8 Steps of PAPA
- 3.6.9 Step 2: In-course activities
- 3.6.10 Step 3: Follow-up Activities



## **Gender Analysis for Monitoring and Evaluation: The Engendered Logframe Approach**

### **DAY THREE — Tentative Schedule**

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09:00 – 09:10	<b>Overview of Day Three</b>
09:10 – 09:30	<b>Session 6 Using the Engendered Logframe for Monitoring and Evaluation</b>
09:30 – 10:30	<b>Exercise 6 Constructing an Engendered Logframe</b>
10:30 – 10:45	Tea/Coffee Break
10:45 – 13:00	<b>Exercise 6</b>
<hr/> <b>13:00 – 14:00 Lunch</b> <hr/>	
14:00 – 15:00	<b>Exercise 6</b>
15:00 – 15:15	<b>PAPA</b>
15:15 – 15:30	Tea/Coffee Break
15:30 – 16:00	<b>Final Evaluation and Closure</b>



## The Engendered Logframe Approach

### DAY THREE — Checklist for Trainers

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#### Handouts

	Yes	No
3.6.1 Overview of Day Three	<input type="checkbox"/>	<input type="checkbox"/>
3.6.2 Tentative Schedule of Day Three	<input type="checkbox"/>	<input type="checkbox"/>
3.6.3 Session 6: (summary of presentation)	<input type="checkbox"/>	<input type="checkbox"/>
3.6.4 Exercise 6	<input type="checkbox"/>	<input type="checkbox"/>
3.6.5 Exercise 6. Worksheet a	<input type="checkbox"/>	<input type="checkbox"/>
3.6.6 Exercise 6. Worksheet b	<input type="checkbox"/>	<input type="checkbox"/>
3.6.7 Action Planning-Final Stage	<input type="checkbox"/>	<input type="checkbox"/>
3.6.8 Final Evaluation	<input type="checkbox"/>	<input type="checkbox"/>

#### Overheads

3.6.1 Objectives of Day 3	<input type="checkbox"/>	<input type="checkbox"/>
3.6.2 Schedule of Day 3	<input type="checkbox"/>	<input type="checkbox"/>
3.6.3 Objectives of Session 6	<input type="checkbox"/>	<input type="checkbox"/>
3.6.4 Analyzing the Engendered Logframe	<input type="checkbox"/>	<input type="checkbox"/>
3.6.5 Steps	<input type="checkbox"/>	<input type="checkbox"/>
3.6.6 Other Considerations	<input type="checkbox"/>	<input type="checkbox"/>
3.6.7 Exercise 6	<input type="checkbox"/>	<input type="checkbox"/>
3.6.8 Steps of PAPA	<input type="checkbox"/>	<input type="checkbox"/>
3.6.9 Step 2: In-course Activities	<input type="checkbox"/>	<input type="checkbox"/>
3.6.10 Step 3: Follow-up Activities	<input type="checkbox"/>	<input type="checkbox"/>



## DAY THREE

## Session 6: Using the Engendered Logframe for Monitoring and Evaluation

### Instructions to Trainers

### SESSION 6

**09:00 – 09:10 Overview of Day 3**

**09:10 – 09:30 Session 6. Using the Engendered Logframe for Monitoring and Evaluation**

**09:30 – 10:30 Exercise 6. Constructing an Engendered Logframe**

**10:30 – 10:45 Tea/Coffee Break**

**10:45 – 13:00 Exercise 6.**

**13:00 – 14:00 Lunch**

**14:00 – 15:00 Exercise 6.**

**15:00 – 15:15 PAPA**

**15:15 – 15:30 Tea/Coffee Break**

**15:30 – 16:00 Final Evaluation and Closure**

### OBJECTIVES

By the end of this day, the participants will be able to do the following:

- Construct an engendered logframe for a FAO project
- Discuss ways in which to strengthen current M&E activities using the engendered logframe approach
- Elaborate an individual action plan
- Evaluate the workshop

### PROCEDURE

Training techniques: presentation, exercise, group presentations, PAPA.

### PRESENTATION

#### **Session 6: Using the Engendered Logframe for Project Monitoring and Evaluation**

Give a brief presentation reinforcing the use of the engendered logframe for monitoring and evaluation purposes. You will find the information in handout 3.6.3. useful.

### EXERCISE 6

#### **Exercise 6. Constructing an Engendered Logframe for a FAO project (3 hours and 40 minutes)**

**Note:** This is a detailed exercise that will take the participants most of the day to complete. Circulate among the groups to ensure that they are maintaining their group

dynamics. Stop at some point to encourage participants to do some relaxation exercises.

1. (*experience*) Distribute the exercise and ask a participant to read the instructions aloud (see handout 3.6.4).

Phase 1. Group work. Invite the participants to form the same two groups, A and B. Each group elects a rapporteur.

**Group A Project:** Training for East and South-East Asian Countries in Uruguay Round Follow-up and Multilateral Trade Negotiations on Agriculture

**Group B Project:** Strengthening Phytosanitary Capabilities in CARICOM Member Countries

2. (*experience*) Invite each group to construct an engendered logframe for the project. Circulate between the groups to answer any questions.
3. (*experience*) Invite participants to identify the most important tools and process requirements for using the engendered logframe in an evaluation of the project.
4. (*experience*) The rapporteurs compile the group's inputs on flipchart paper and prepare to present their groups' results. (They should reserve at least 10 minutes for this task.)
5. (*experience*) Phase 2. Reporting and discussion. Invite the rapporteurs to present their groups' results to the audience. Ten minutes are available for each presentation.
6. (*process*) Analyze the responses and give feedback to the groups. Facilitate a plenary discussion. (10 minutes)
7. (*process*) Ask the participants how they felt doing this exercise. What have they learned about themselves? Others?
8. (*generalize*) How will this information/experience be useful during this workshop?

## **PAPA PRESENTATION**

Give a brief presentation reinforcing the use of PAPA during this workshop. Remind the participants of the information you presented on PAPA at the beginning of the workshop. You may use overheads 3.6.8, 3.6.9 and 3.6.10 to review PAPA. Note that the participants have been jotting down possible action items throughout the workshop. Now it is time for them to focus on finalizing their specific action items for when they return to their jobs. Be sure to ask the participants if they have any comments or questions, or need clarifications. (5 minutes)

## **PAPA EXERCISE**

### **PAPA Exercise—Second stage.**

1. Distribute handout 3.6.6. This is the form for the second stage of PAPA.
2. Individual work: Ask the participants to review the work they have done over the last five days and to refer to the PAPA notes they made throughout the workshop. They should formulate specific action items and write them on the handout. Tell them to refer to the questions about their action items in order to be sure they are written as “specifically” as possible. (15 minutes)
3. Group sharing and discussion: Go around the room and ask each person to tell you their action items. List each item on flipcharts. If some people have similar items, just indicate with a check by the original item. Do not rewrite. This will give a good idea of the range of action items people are interested in undertaking. (25 minutes)
4. Collect the completed forms from the participants. (Make photocopies to return to the participants before they leave). Remind them that you will be following up with them after several months to see how they have progressed toward their action items.

### **16:00 – 16:15 Final Evaluation, Delivery of Certificates and Closing**

#### **Workshop evaluation (15 minutes)**

Distribute handout 3.6.7. Have the participants complete the evaluation before they leave the session. Give them about 15 minutes for this task. As soon as the participants return the evaluation forms, invite them to make oral comments regarding the evaluation of the workshop. Facilitate a brief discussion.

Close the workshop. Award certificates, if provided.



## DAY TWO

## Session 6 Summary of Overheads

### Objectives of Day 3

- Construct an engendered logframe for a FAO project
- Discuss ways in which to strengthen current M&E activities using the engendered logframe approach
- Elaborate an individual action plan
- Evaluate the workshop

The Engendered Logframe Approach 3.6.1

### 3.6.1

### Schedule of Day 3

09:00 – 09:10 Overview of Day Three  
09:10 – 09:30 Session 6  
09:30 – 10:30 Exercise 6

————— *Tea/Coffee Break* —————

10:45 – 13:00 Exercise 6

————— *Lunch* —————

14:00 – 15:00 Exercise 6.

15:00 – 15:15 PAPA

————— *Tea/Coffee Break* —————

15:30 – 16:00 Final Evaluation and Closure

The Engendered Logframe Approach 3.6.2

### 3.6.2

## Objectives Session 6

- Construct an engendered logframe

The Engendered Logframe Approach 3.6.3

### 3.6.3

## Analyzing the Engendered Logframe

Logframe Level	Strategic Gender Element	Analytical Tool
<b>Goal (and assumptions)</b>	Policy responsiveness	Institutional analysis/ mapping
<b>Purpose (and assumptions)</b>	Gender needs	Practical/strategic needs
<b>Outputs (and assumptions)</b>	Gender division of benefits (distribution)	Benefits profile
<b>Activities (and assumptions)</b>	Gender roles and relations	Triple-role framework
<b>Inputs (and assumptions)</b>	Access to and control of resources	Material resource flow

**Process &  
Participants  
who?**

The Engendered Logframe Approach 3.6.4

### 3.6.4

## Steps

- Working from bottom up, examine the engendered logframe and ask how each of its levels responded to:
  - κ *the relevant strategic gender element*
- Given the ...
  - κ *choice of tool*
  - κ *process and participants involved*
- Did the project achieve/fail to attain a particularly important milestone? If so, how did this affect implementation and impact?
- How were the views of different target groups/stakeholders reflected in the logframe? What were their views on the achievements identified both during monitoring and subsequently during the final evaluation?

The Engendered Logframe Approach 3.6.5

### 3.6.5

## Other Considerations

- Evaluation terms of reference.
- Data is collected and maintained by the project
- Evaluators' opportunity to meet with project beneficiaries to address process behind the logframe
- Evaluators share their results - project managers & project beneficiaries

The Engendered Logframe Approach 3.6.6

### 3.6.6

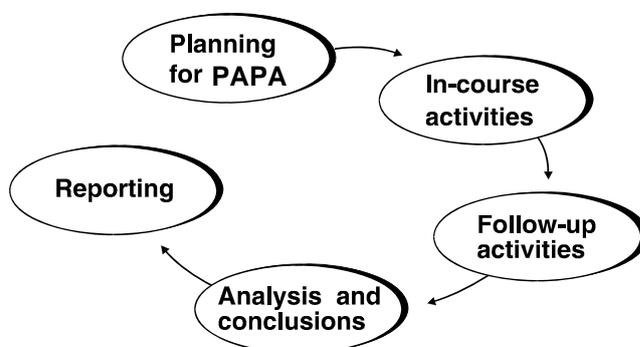
## Exercise 6

- Return to FAO project case study groups
- Construct an engendered logframe for the project
- Identify key tools and processes for evaluating the project
- Plenty of time available

The Engendered Logframe Approach 3.6.7

### 3.6.7

## Steps of PAPA



The Engendered Logframe Approach 3.6.8

### 3.6.8

## Step 2: In-course Activities

### Stage 2

**Objectives:**

- develop action plan

**Procedure:**

- prepare preliminary list of action items
- confer with partner
- finalize and prioritize list of action items
- report individual action plans
- make copy and submit to trainer

The Engendered Logframe Approach 3.6.9

3.6.9

## Step 3: Follow-up Activities

### Trainers

- Formulate and send questionnaire
- Analyze and interpret data
- Prepare report
- Modify course content

### Participants

- Fill out and return questionnaire
- Receive report and send feedback

The Engendered Logframe Approach 3.6.10

3.6.10

# Gender Analysis for Monitoring and Evaluation: The Engendered Logframe Approach

## DAY THREE — Overview

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### Objectives

By the end of this day, the participants will be able to do the following:

1. Construct an engendered logframe for a FAO project.
2. Plan actions for future activities in gender evaluation (participant action plan).
3. Evaluate the workshop.

### Handouts

- 3.6.1 Overview of Day Three
- 3.6.2 Tentative Schedule of Day Three
- 3.6.3 Session 6: Using the Engendered Logframe for Monitoring and Evaluation (summary of presentation)
- 3.6.4 Exercise 6. Constructing an Engendered Logframe for a FAO project.
- 3.6.5 Exercise 6. Worksheet a
- 3.6.6 Exercise 6. Worksheet b
- 3.6.7 Action Planning—Final Stage
- 3.6.8 Final Evaluation

### Overheads

- 3.6.1 Objectives of Day 3
- 3.6.2 Schedule of Day 3
- 3.6.3 Objectives of Session 6
- 3.6.4 Analyzing the Engendered Logframe
- 3.6.5 Steps
- 3.6.6 Other Considerations
- 3.6.7 Exercise 6
- 3.6.8 Steps of PAPA
- 3.6.9 Step 2: In-course Activities
- 3.6.10 Step 3: Follow-up Activities



# Gender Analysis for Monitoring and Evaluation: The Engendered Logframe Approach

## DAY THREE — Tentative Schedule

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09:00 – 09:10	<b>Overview of Day Three</b>
09:10 – 09:30	<b>Session 6: Using the Engendered Logframe for Monitoring and Evaluation</b>
09:30 – 10:30	<b>Exercise 6: Constructing an Engendered Logframe</b>
10:30 – 10:45	Tea/Coffee Break
10:45 – 13:00	<b>Exercise 6</b>

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**13:00 – 14:00 Lunch**

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14:00 – 15:00	<b>Exercise 6</b>
15:00 – 15:15	<b>PAPA</b>
15:15 – 15:30	Tea/Coffee Break
15:30 – 16:00	<b>Final Evaluation and Closure</b>



## **Session 6: Using the Engendered Logframe for Monitoring and Evaluation**

### **(summary of presentation)**

#### **Introduction**

The logical framework is often associated with the initial stages of program management – that is, program or project design and proposal writing. It is also, however, an effective tool for monitoring and reporting, and eventually conducting the evaluation of an individual, or a set of projects (meta-analysis or meta-evaluation).

Monitoring involves observing and checking project activities with a view to verifying achievement of outputs and changes in context that may implicate subsequent management decisions.

Monitoring makes reference to the indicators as specified in the logframe for:

1. the goal (or the development objective)
2. the project purpose (or immediate objectives)
3. the outputs
4. the activities
5. the resources (inputs)

Evaluation is an analytical assessment of the performance of a project in light of the specified purpose (or objectives, as stated in the logframe). Typically, evaluation refers to the final evaluation or impact assessment of a project (or set of projects). It is also, however, a learning and action-oriented process for improving current and future management activities and organizational development.

Both M&E include attention to the conditions described in the assumptions at each level of the project. The assumptions are also stated in the logframe and are assessed in terms of the extent to which they affected project achievements.

#### **Using the Engendered Logframe for M&E**

In initiating the M&E of a project, using the Engendered Logframe approach, it is useful to see your task as one that begins by examination of each level of the logframe, its assumptions, and its relevant strategic gender element. You then ask which analytical tool might be used to determine the achievement at each level of the logframe (remember you are working bottom-up (from activities to goal). It is also necessary to examine the process and participants behind the logframe (see Table 1).

**Table 1: Analysis of the Engendered Logframe in Project Monitoring and Evaluation**

Logframe Level	Strategic Gender Element	Analytical Tool	Process & Participants who?
Goal (and assumptions)	Policy responsiveness	Institutional analysis/ mapping	
Purpose (and assumptions)	Gender needs	Practical/strategic needs	
Outputs (and assumptions)	Gender division of benefits (distribution)	Benefits profile	
Activities (and assumptions)	Gender roles and relations	Triple-role framework	
Inputs (and assumptions)	Access to and control of resources	Material resource flow	

The analytical steps involved in the use of the engendered logframe for monitoring and evaluation are summarized as follows:

1. Working from bottom up, examine the engendered logframe and ask how each of its levels responded to:
  - the relevant strategic gender element
 Given the ...
  - choice of tool
  - process and participants involved
2. Did the program/project achieve or fail to attain a particularly important milestone? If so, how did this affect the implementation and impact?
3. How were the views of different target groups/stakeholders reflected in the logframe? What were their views on the achievements identified during monitoring and subsequently during the final evaluation?

## Other Considerations for Using the Engendered Logframe for Evaluation

The use of the engendered logframe for final evaluation requires some prior planning because final evaluation is typically conducted by an external group of reviewers. It is, therefore, important to ensure the following:

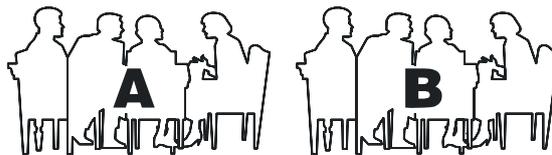
1. Terms of reference for the evaluation refer specifically to the use of the engendered logframe, and steps and tools are suggested in the analysis.
2. Data is collected and maintained by the project to support project evaluation (partly in accordance with the “means of verification” indicated in the logframe). A database of information is recommended, and may be included in project activities.
3. Evaluators have sufficient opportunity to meet with project beneficiaries to discuss their inputs to the logframe levels, or what has been referred to as the “process behind the logframe.”
4. Evaluators share their results not only with project managers, but if possible also with project beneficiaries (e.g., a feedback workshop) in order to ensure that evaluation contributes to a learning process and innovation for the future.

## Exercise 6: Constructing an Engendered Project Logframe

(group work and plenary discussion)

### Phase 1. Group work (2 hours 30 minutes)

9. Form the same two groups, A and B. Each group elects a rapporteur.



**Group A Project: Training for East and South-East Asian Countries in Uruguay Round Follow-up and Multilateral Trade Negotiations on Agriculture**

**Group B Project: Strengthening Phytosanitary Capabilities in CARICOM Member Countries**

10. Each group **constructs an engendered logframe** for the project. (90 minutes)
11. Identify the **most important tools and process requirements** for using the engendered logframe in an evaluation of the project. (30 minutes)
12. The rapporteurs compile the groups' inputs on flipchart paper and prepare to present their groups' results. (10 minutes).

### Phase 2. Reporting and discussion (30 minutes)

13. The rapporteurs present the results to the audience. Ten minutes are available for each presentation.
14. The trainer analyzes the responses, after which you will be invited to participate in a plenary discussion.
15. The trainer summarizes and then closes the session.







## Exercise 6. Worksheet b

	<b>Narrative summary</b>	<b>Objectively verifiable indicators</b>	<b>Means of verification</b>	<b>Important assumptions</b>
<b>Goal</b>				
<b>Purpose</b>				

<b>Outputs</b>				
<b>Activities</b>		<b>Inputs</b>		

## Action Planning—Final Stage

### Ideas for Action Items

Date: \_\_\_\_\_

Workshop Title: **Gender Analysis for Monitoring and Evaluation**

Date/Venue: \_\_\_\_\_

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Action Items	Start to implement action plan (check if known)		
	Within 2 months	After 2 months	As opportunity arises
I plan to:			



# Workshop on Gender Analysis for Monitoring and Evaluation

## Evaluation Form

Your cooperation in completing this questionnaire will be greatly appreciated. The information you provide will be useful in planning future events and will help resource persons to improve their materials and presentation.

**A. General Reactions**

In general, I would rate the workshop as: <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Average <input type="checkbox"/> Fair <input type="checkbox"/> Poor	On balance, would you say that the workshop objectives were achieved? <input type="checkbox"/> Yes <input type="checkbox"/> Partially <input type="checkbox"/> No (If no, please explain briefly in section F)
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**B. Objectives**

The objectives of this workshop are listed below. Please mark on a scale of 1 to 5 if, in your opinion, the objectives have been achieved. *The scale ranges from 1 (the objective has not been achieved) to 5 (the objective has been fully achieved).*

- Define and discuss the concept of gender ..... ① ② ③ ④ ⑤
- Identify current issues in gender, poverty and agriculture ..... ① ② ③ ④ ⑤
- Explain gender evaluation..... ① ② ③ ④ ⑤
- Compare gender-blind with gender-conscious approaches to evaluation ..... ① ② ③ ④ ⑤
- Identify the key components of the “engendered logframe” ..... ① ② ③ ④ ⑤
- Construct an engendered logframe for a FAO project ..... ① ② ③ ④ ⑤
- Plan future actions using the PAPA method ..... ① ② ③ ④ ⑤

**C. Strengths and Weaknesses**

- Please list what you consider to be three strengths of the workshop

1.

2.
3.

**• Please list what you consider to be three weaknesses of the workshop**

1.
2.
3.

**D. Features**

	Very Good	Good	Fair	Poor
Lead Trainer.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Co-Trainer (if applicable) .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lectures .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discussions .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Papers/Handouts .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization and Management .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of visual aids .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quantity of visual aids .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**E.**  
**Additional  
Topics**

What additional topics would you have liked included in this workshop?

**F.**  
**Comments**

Please use the space below to write down any additional comments or suggestions you might have.



# ***Annexes***



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## The Feminization of Poverty: Facts, Hypotheses and the Art of Advocacy

by *Alain Marcoux*

Senior Officer, Population and Environment  
Population Programme Service (SDWP)  
FAO Women and Population Division

### Introduction

The world's population of poor is commonly estimated at 1300 million persons (UNDP 1996: 20; ICQL 1996: 18). Women, especially in developing countries, bear an unequal share of the burden of poverty; an oft-repeated statement in this respect is that 70 percent of the world's poor are women (e.g. UNDP 1995: iii; United Nations 1996a: 6).[1]

No scientific study, however, is cited to document this exceptionally high ratio, and a statistician or demographer cannot help harbouring doubts about its validity. With a 70/30 distribution, the global population of poor would comprise 910 million women and girls and 390 million men and boys, a 2.33 female/male ratio, and an 'excess' of 520 million female members. But although this is tall enough, there actually is more to it because children are hardly affected by the two phenomena that may contribute to the excess of females in poor households, namely male out-migration and excess male mortality.[2] The excess number of females is therefore concentrated in older age groups. Now, taking the age structure of the 1300 million poor to be similar to that of the whole population of the low-income countries, they comprise slightly more than 60 percent - about 800 million persons - aged over 15 (henceforth 'adults'). A 520 million sex imbalance will then translate into 660 million female and 140 million male adult poor, with a female/male ratio of about 4.7, twice the ratio based on the total population. It does not seem that an imbalance of close to five females for each male among the adult poor has ever been observed on any significant scale.

Good observations are scarce indeed, and solid statistical information on the reality of the gender bias in poverty is lacking. Large-scale assessments of poverty, for a start, only occasionally rely on household surveys, the correct instrument for assessing levels of living and hence poverty. As a result, "much of the analysis of poverty and gender rests on assumptions and inference from very limited data and case studies" (United Nations 1995a: 129), a situation which fostered the circulation of 'guesstimates' of uneven quality.

Yet the information analysed during the 1970s did not point to large sex differentials in the incidence of poverty.[3] Could the feminization of poverty have progressed so quickly as to produce a 70/30 sex distribution in two decades? This idea is by no means widely accepted among scholars, and some recent assessments argue that women are not generally over-represented in poor households (Lipton and Ravallion 1995). It still is widely assumed "that women are disproportionately represented among the poor", but there is little "robust evidence" to support that assumption (Quisumbing, Haddad and Peña 1995: 1). Let us now see what some recent field observations do tell us.

## Survey data

In a study commissioned by the UN Statistical Division (United Nations, 1995a: 129-130), data from household surveys were compiled and analysed by the International Food Policy Research Institute (IFPRI). The sex distribution of the population was thus assessed in the poorer households of 14 developing countries (Bangladesh, Botswana, Côte d'Ivoire, Ethiopia, Ghana, Guatemala, Honduras, Indonesia, Madagascar, Nepal, Niger, Pakistan, the Philippines and Rwanda) and eight developed countries (Australia, Canada, Germany, Italy, the Netherlands, Sweden, the United Kingdom and the United States). "Poorer households" for this purpose meant those in the lowest quintile for income; this definition is appropriate for us, as we refer here to an estimated population of poor of 1300 million, or currently 22 percent of the global population. The observations regarding the female/male ratio were the following:

- With regard to the developing countries the number of females for 100 males was under 120 in half of the cases, and the highest ratio observed was 192 (in Botswana, the country with the highest occurrence of women-headed households). All this contrasts with the 233 world-wide average implied by the 70/30 slogan. The average female/male ratio, weighted by the size of the rural poor population, was 116 [4]. This corresponds to a proportion of women of 53.5 percent, far from the purported 70 percent.
- Sex imbalances were even smaller in the developed countries. Female/male ratios in the poorer households varied from a little more than 90 (in Sweden) to a little more than 130 (Australia, USA), implying proportions of women between 48 and 57 percent.

In brief, where adequate data are available the average proportion of women among the poor is lower than 55 percent. It could be higher in places and countries not included in the study (it could be lower too), but scientific correction dictates that in the absence of data no claim can be made on the situation in those areas.

On the other hand, the numbers of women poor seem to grow faster than those of men poor. Could this make possible a 70/30 ratio today? Jazairy, Alamgir and Panuccio (op.cit.) estimated the female/male differential growth rate at 1.2 percent, i.e.. 3.9 minus 2.7 percent among the rural poor of developing countries between 1965-70 and 1988 (at the latter date the proportion of women among those poor would have been 60 percent [5]). A continuation of the said differential (at lower rates, to be consistent with the estimated 1300 million total number of poor world-wide) would have brought the proportion of women in that same population to no more than 62 percent in 1997. This could have raised the global proportion of women poor by at most 1.5 percentage points, far from the level of 70 percent.

Let us nevertheless examine whether a 70/30 distribution could conceivably have been true, for this exercise will teach us a lesson about using illustrative figures for advocacy.

## Considerations on demographic consistency

An explanation commonly given for the supposed excess of female poverty is the occurrence of poor, women-headed households (henceforth PWHH), inasmuch as those households comprise more female than male members. Let us examine to what extent this can suggest a 70/30 sex distribution of poverty at the global level.

An estimate of the number of women-headed households by region is given in Table 1 (all estimates will refer to the year 1995, when the 70/30 slogan was already widely publicized).

Average household sizes and proportions of women-headed households are estimated as of 1990. It is sensible to assume that values have not changed enough between 1990 and 1995 to affect the calculation significantly. Proportions of women-headed households are on the rise, but so are average household sizes in several developing areas (MacKellar et al. 1995: 851); these two factors tend to compensate each other where they apply. On the other hand, there often is some under-registration of women-headed households, especially in developing countries. Someone seeking a maximum estimate of the number of women-headed households world-wide, may want to take it to be 25 percent (instead of 19 percent) of the estimated total number of households in numbers, 355 million.

**Table 1. Estimation of the numbers of women-headed households by major region, 1995**

Region	(a) Population 1995 (millions)	(b) Average household size	(c) Millions of households = (a) : (b)	(d) Proportion women-headed	Millions of women-headed households = (c) x (d)
North Africa	158	5.7	27.7	0.13	3.6
Sub-Saharan Africa	561	5.1	110.0	0.20	22.0
Eastern Asia	1421	3.7	384.1	0.21	80.7
Southeast Asia	482	4.9	98.4	0.13	12.8
South/Central Asia	1367	5.7	239.8	0.10	24.0
Western Asia	168	5.1	32.9	0.12	3.9
Latin America	441	4.7	93.8	0.21	19.7
Caribbean	36	4.1	8.8	0.35	3.1
Oceania	28	4.9	5.7	0.17	1.0
Developed countries	1171	2.8	418.2	0.24	100.4
World	5687	(4.0)	1419.4	(0.19)	271.2

*Sources:* (a) United Nations 1996c; (b) United Nations 1995a, and MacKellar et al. 1995; (d) United Nations 1995a (sub-regional figures are either as published in the document or calculated from country data presented therein).

One should now estimate the proportion of PWHH among the women-headed households. First of all, what is the total number of poor households? One must divide the total number of poor by average household sizes separately for developing and developed countries, in view of the very large differences in household sizes and in the incidence of poverty. With regard to the latter factor Table 2 reflects the common notion that, given the far greater population size and proportion of poor, absolute numbers of poor are overwhelmingly concentrated in developing regions; the figures correspond to a level of poverty incidence in these regions about treble that in developed ones (27 percent to 9 percent).

Average household size according to Table 1 is 4.7 in developing countries and 2.8 in developed countries. The average size of poor households, however, must be different: "poverty risk is almost always ... much greater among members of big households. Conversely, single-member households ... are heavily under-represented among the poor" (Lipton 1988: 39). Accordingly, and in line with empirical findings (e.g. Lopez, Pollack and Villarreal 1992: 89, 126) Table 2 assumes that poor households of developing countries have

0.5 more units on average than total households. For developed countries one may use a uniform household size as "both the predominance of big households ... and the scarcity of small ones ... among the poor are much less clearly established" (Lipton, *ibid.*).

**Table 2. Estimation of the numbers of poor households in developing and developed countries, 1995**

	Number of poor (millions)	Average household size	Poor households (millions)
Developing countries	1200	5.2	231
Developed countries	100	2.8	36
World	1300	(4.9)	267

Finally one must distribute all households into the four categories resulting from the combination of the two criteria: {men-headed/women-headed} x {poor/non-poor}. Women-headed households do seem more vulnerable to poverty than men-headed ones, but where comparable data are available the actual difference in poverty incidence is not very great (see Appendix).[6] Although the evidence points to a more modest bias, in order to supply a maximum estimate of female poverty one can assume, like for Table 3, that the incidence of poverty in women-headed households is 50 percent greater than in men-headed ones (over 25 percent to less than 17 percent).[7]

**Table 3. Estimation of the numbers of poor and non-poor, men-headed and women-headed households, 1995 (in millions)**

	Men-headed households	Women-headed households	Total
Poor	177	90	267
Non-poor	888	265	1153
Total	1065	355	1420

The problems inherent in explaining excess female poverty at the level of a 70/30 ratio on grounds of the PWHH phenomenon become rapidly apparent:

- For the PWHH to contribute entirely to excess female poverty, one should assume that the sex structure of poor, men-headed households is balanced while that of PWHH presents an excess of female members. Since intra-household differences between male and female numbers due to differential mortality are limited, however, most of the female-male gap in the PWHH would be essentially due to the departure of males (migration, separation etc.). But then the absent males would necessarily be found in men-headed (including one-person) households, which would tend to bias the sex structure of those households towards a higher proportion of males. It follows that the PWHH contribute to excess female poverty only inasmuch as the absent males are not themselves poor.
- This reduces the weight of the PWHH argument considerably, for many of the absent males are probably poor, too. And if poor, men-headed households are twice as numerous as the PWHH as in Table 3, a male bias in their sex composition will offset twice as large a female bias in the sex composition of the PWHH.
- Assuming a 1.0 average difference between female and male numbers in poor households and no poverty among absent males, it appears that the PWHH cause significantly less

than 100 million units in excess female poverty. But even a 1.0 gap is an exaggeration. For developing countries the IFPRI study found an average gap of about 7 percent (53.5 minus 46.5) of the population; for a household size of 5 to 6, the gap would be about 0.35 to 0.4 units. It would be proportionally bigger in women-headed households, but not much bigger in absolute terms, because those households are smaller in size than average.[8] And it would be smaller (again in absolute terms) in developed countries, where all households are much smaller, especially women-headed ones.

Can other hypotheses account for the 'remainder' of the gap? The question seems futile in view of the magnitude of the unexplained difference: well over 400 million persons. At any rate the only hypothesis seems to be the occurrence of poor women in non-poor households, e.g. living-in maids. As no statistical information is available on such patterns of occurrence of poverty, one can only ask: could those women possibly be so numerous? The answer is clearly 'no': women working in the "Community, social and personal services" branch worldwide appear to be less than 120 million [9] (and part of those only would fall into the category of relevance to us). These figures might underestimate the phenomenon, in particular as regards young girls; for the assessment of total female poverty, however, this would be irrelevant: the higher the number of girl poor in non-poor households, the lower that number in the households of origin, and the lower the female/male ratio in the latter.

The use of different parameters, within reasonable ranges, for the preceding calculations invariably leads to the same conclusion: given the huge numerical inconsistencies encountered, there is not a feasible scenario to support the 70/30 slogan. It would have been advisable to test the likelihood of the latter in order to arrive at a more credible figure, which would not have unnecessarily cast shadows on the seriousness of the issue at hand, for if a cause for scepticism is offered, one may end up doubting the very existence of the phenomenon under examination.

## Information and data needs

That the gender bias in poverty does not reach the very high levels sometimes attributed to it does not mean that the bias is not real or not growing. Indeed it seems to be both, although very unequally across countries and places. The first need appears to be to continue to document its magnitude and trends in a larger number of settings than has been done so far, to be able to address it where it exists. In so doing, attention to methodological issues will be warranted. It has been ascertained that female household headship is a heterogeneous phenomenon, and that looking into the causes for female headship is extremely relevant in studying poverty (Quisumbing, Haddad and Peña 1995: 25-26). Also, in a policy perspective it is necessary to use additional methods of assessment besides those based on income, for gender biases and their causes may emerge more clearly through approaches that favour social indicators (mortality, health and nutrition, time allocation) and aim to assess individual capability factors (access to resources, level of education etc.).

It might be appropriate to give special attention to the poorest segments of population, since the bias against women sometimes appears to increase along with the degree of poverty (Lipton 1983: 48). Inasmuch as priority action within poverty-alleviation policies ought to address the poorer of the poor, any systematic bias in the composition of the population concerned may suggest targeted interventions and possibly help define them. Hence the value

of assessing not only the differential incidence of poverty, but also its gender-specific causes. The rural-urban dichotomy, *inter alia*, will be of obvious utility here.

More empirical research is also needed in respect of another aspect of gender biases in poverty issues, namely intra-household inequalities in terms of welfare and control of resources. With reference to the discussion on sex imbalances within the poor population, however, let us note that intra-household imbalances can hardly affect the sex distribution of poverty: they would have an impact at this level only if there were households where female members are below the poverty line while male members are above it. There is no known measurement of such patterns.

Of course, the above detracts nothing from the policy relevance of this issue. Some of the more publicized problems, such as gender biases in food consumption, or in-house health care, seem to have been overstated (United Nations 1996b: 13-14; Haddad et al. 1996: 5-22). On the other hand, education (even though gaps are narrowing), or the control of productive assets, remain real issues; and they are critical for strategies aiming at accelerating development as well as rendering it more equitable (Lipton 1988: 44-45; Quibria 1993: 7, 13-19). Better data coverage is needed, to assess those biases and their changes over time.

An indirect but significant benefit of more rigorous fact-finding will be to provide more relevant and convincing materials to be used in making decision makers, as well as the general public, more aware of the magnitude and exact nature of these important issues.

## Notes

1. Not all UN bodies use these figures; according to UNIFEM (1995: 7), "women constitute at least 60 percent of the world's one billion poor".
2. For developing countries as a whole, the probability of dying by age five is, on average, only two percent higher among males than among females. Male mortality is higher during the first year of life, but thereafter the reverse is true (United Nations 1996b).
3. See the evidence reviewed in Lipton (1983: 48-53).
4. Source for estimates of the rural poor population: Jazairy, Alamgir and Panuccio (1992: 404-405). The result is virtually the same if country indices are weighted by total population.
5. A 60 percent level for rural areas could be roughly consistent with the UN-IFPRI results. But Jazairy, Alamgir and Panuccio certainly overestimated female rural poverty, for they assumed: (a) that all women-headed rural households are poor (*op.cit.*: 470); (b) that no male absent from those households lives in other poor rural households, since the female/male ratio in these is taken to be 1 (*ibid.*); and (c) that women constitute 75 percent of the population of women-headed households. The latter assumption (which is not made explicit) is the most misleading: children represent about 40 percent of the population of poor households, and an even higher proportion in poor women-headed households because of absent adults; but even with 20 percent of boys and 20 percent of girls only, reaching an overall ratio of 75/25 would imply 55 females for 5 males among the adults. That the female/male ratio should reach at least 11, entails a rate of out-migration of male adults of the order of 90 percent, which seems preposterous on a scale of several tens of million households.
6. Also see Lipton (1988: 45); United Nations (1995a: 129); and Quisumbing, Haddad and Peña (1995).

7. Our deliberate overstatement of 90 million PWHH for the whole world in 1995 compares with Jazairy, Alamgir and Panuccio's figure (op.cit.: 423) of 75.5 million for the rural segment of developing countries in 1988 (see footnote 5 above).
8. Among countries where data are available, the median difference between men-headed and women-headed household sizes is 1.5 for developed countries and 0.9 for developing ones (United Nations 1995b: 12).
9. The sum of numbers reported, for countries totalling 92 percent of the world population, is under 108 million (United Nations 1996d: 242-251).

**Appendix: Distribution of urban households by poverty stratum, by sex of head of household: 12 Latin American countries, 1994**

Country	Sex of head of household	Distribution of households by poverty stratum		
		Indigent	Other poor	Non-poor
Argentina	Male	1.6	9.2	89.2
	Female	1.0	7.5	91.1
Bolivia	Male	13.8	27.3	58.9
	Female	15.5	25.8	58.7
Brazil (1993)	Male	16.0	22.7	61.3
	Female	17.1	21.5	61.4
Chile	Male	5.9	17.9	76.2
	Female	7.5	15.9	76.5
Colombia	Male	16.2	24.5	59.3
	Female	16.1	24.0	59.9
Costa Rica	Male	4.5	12.0	83.5
	Female	9.8	14.0	76.2
Honduras	Male	39.0	28.6	32.4
	Female	45.8	29.2	25.0
Mexico	Male	6.6	23.2	70.2
	Female	4.0	21.3	74.7
Panama	Male	7.6	16.6	75.8
	Female	12.1	16.2	71.7
Paraguay	Male	14.3	27.2	58.5
	Female	19.3	21.3	59.4
Uruguay	Male	1.2	5.0	93.8
	Female	0.8	4.0	95.1
Venezuela	Male	11.8	26.4	61.8
	Female	18.7	30.8	50.5

*Source:* ad hoc tabulations from national household surveys. Female indices: CEPAL 1996: 202. Male indices: unpublished tables, CEPAL.

## References

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## Background Note on Gender & Poverty:

UNDP's efforts at engendering anti-poverty programmes falls under two rubrics:

- (a) a long-term or strategic goal of Gender Mainstreaming within the UNDP
- (b) the integration of gender concerns into anti-poverty projects and programmes.

Vis -a -vis (b) the need to address gender issues in poverty alleviation is premised on a number of different "facts":

- *Gender-differentiated processes of vulnerability to poverty*

Women, especially in many of the developing countries, appear to bear an unequal share of the burden of poverty, a phenomena popularly known as the "feminization of poverty". The debate which began with the appropriateness of using female headed households to arrive at an index of women's poverty (Marcoux 1997; ILO) has moved to focus attention from states to processes, i.e. to look at the differentiation in the processes by which men and women become poor.

Most development frameworks take the family to be the unit of analysis, thus ignoring intra-familial distribution issues. However, families and households are characterized not only by cooperation amongst family members but by conflict as well (Sen 1990). A certain amount of inequality in the distribution of resources, decision making powers and in the allocation of the labour of family members appears to be the rule rather than the exception. The fact that women have primary responsibilities for reproductive labor (child bearing & rearing and care of family members), limits the range of paid economic activities they can undertake. Women are relatively more vulnerable to chronic poverty on account of gender inequalities in the distribution of income, in the access to productive inputs such as credit or control over earned income. Evidence on issue of gender preference in the labor market is mixed.

- *Gender inequalities linked to intergenerational reproduction of poverty*

Recent research has helped to focus on yet another "process" in the context of female headed households (FHH) -- the linkage between female poverty and the reproduction of inter-generational poverty. This is related to relative differences in responsibilities and expenditure patterns of women as compared to men within households. Women tend to use a relatively greater proportion of their earnings for the well-being of their children. Hence, when women have well-paid jobs, they are more likely than men to use their earnings for the education, nutrition of their children. Conversely if FHHs do not enjoy a minimum level of income, they are likely to transmit the poverty to their children. For example, daughters are more likely to be obliged to quit school to take care of their brothers and sisters while their mothers work and face reduced schooling & earning mobility in turn. Research carried out in Brazil, Zambia and the Philippines has shown that the survival chances of children from these households appear to be significantly inferior to those of children from other households. Similarly a study for Guatemala indicated that when income is earned by the father rather than the mother, it would take 15 times more expenditure to achieve a similar level in child nutrition. There are similar

indications from studies for Chile, Jamaica, Kenya and Malawi. (ILO Press Kit on the Feminization of Poverty)

- *Poverty is multidimensional*

Viewing poverty through a gender lens has also heightened the perception of the multidimensionality of poverty and the of the trade-offs that poor people face between different dimensions of poverty. If one were to be more concerned about eradicating women's poverty by enhancing their capabilities, then poverty eradication strategies would be more likely to focus on the eradication of illiteracy, the closing gender gaps in education, an increase in public provision of health services, water, etc. While all of these measures contribute to overall poverty eradication, they appear to particularly critical for poor women by helping to alleviate 'time poverty'. The absence of health services, clean water and energy sources usually translates into added work for women.

- *Good policy and economic efficiency: economics of "unpaid labor"*

Over time the emphasis shifted to the analysis of the relation between the macroeconomy and gender relations. This involved not only the recognition of the non-neutral gender effects of macroeconomic policies but also the feedback effects of gender relations on the macroeconomy itself (Isabella Bakker).

The argument is that standard macroeconomic models and structural adjustment programs have frequently ignored gender differences in time use and access to resources both in the home and the labour market. Women's unpaid caring activities are not factored in as use of economic resources and the household is assumed to be a flexible buffer for economic shocks in two senses: Policies aimed at raising economic efficiency and productivity ignore the fact that women's work in un-paid activities typically is in addition to their paid work adding to their experience of time poverty. Policies may also not be effective since women workers and producers may not be able to respond as expected. In order to facilitate women's labor force participation, it may be necessary to redistribute the burden of care toward men within the household and/or socialize the cost of child care or other types of caring labor. On the other hand, the need for women to work is ignored. Many economic adjustment programs assume that women can simply be sent home with unpaid activities buffering the loss of paid activities and/or cuts in transfer payments. This may not be feasible for the household, i.e. women may have to undertake paid work. The efficacy of all policies, including macroeconomic policies thus need to be evaluated from both a gender and a poverty perspective.

**This background note draws heavily on:**

- Bakker, Isabella "UNPAID WORK AND MACROECONOMICS: New Discussions, New Tools for Action" August 1998
- Nilufer Cagatay, "Gender and Poverty" SEPED Working Paper #5 May 1998 (PDF format)
- Nilufer Cagatay, "Engendering Macroeconomics and Macroeconomic Policies" SEPED Working Paper #6 1999 (PDF format)
- ILO Press Kit on the Feminization of Poverty  
Shahra Razavi, "Gendered Poverty and Social Change: An Issues Paper", UNRISD (joint publication with UNDP & SIDA) Discussion Paper 94, May 1998
- Marcoux, Alain, "The Feminization of Poverty: Facts, Hypotheses and the Art of Advocacy" FAO SD Dimensions 1997

**Also see:**

- Mercedes Gonzalez de la Rocha (edited by Alejandro Grinspun) SEPED Conference Paper Series #6 Private Adjustments: Household Responses to the Erosion of Work



# ***Overheads***