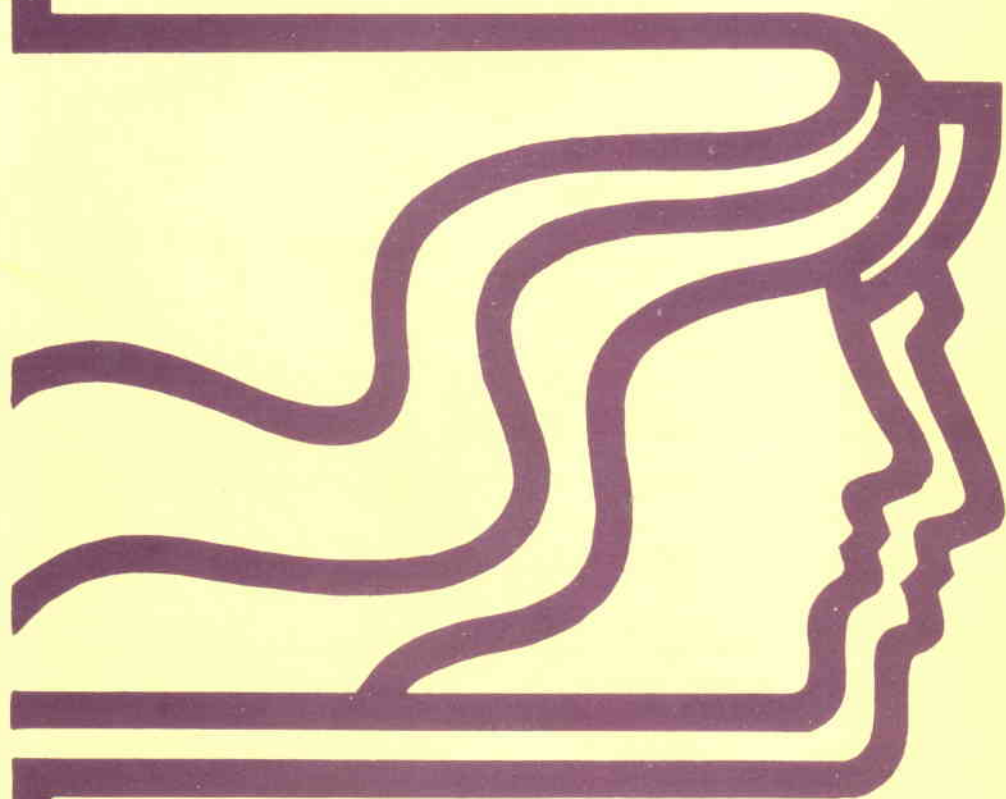


Guidelines for
Developing and Implementing
Gender-Responsive
Programs and Projects



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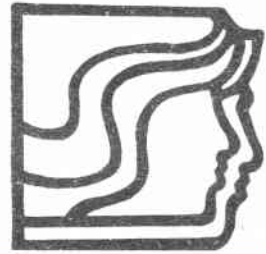


Canadian International Development Agency (CIDA)



National Commission on the Role of Filipino Women (NCRFW)

CIDA-NCRFW Institutional Strengthening Project (ISP II)



**GUIDELINES FOR DEVELOPING AND
IMPLEMENTING GENDER-RESPONSIVE
PROJECTS AND PROGRAMS**

Produced by
National Commission on the Role of Filipino Women
National Economic and Development Authority
1993



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FOREWORD

Significant developments for the advancement of women have taken place since the end of the first decade for women (1986 onwards). These include, among others, the adoption by government of the Philippine Development Plan for Women and Women in Nation Building Act, passage of the New Family Code and incorporation in the Medium-Term Philippine Development Plan of policy statements on gender and development.

While these policy developments are considered milestones, translating them into concrete programs and projects remain a formidable challenge. Rising to such a challenge, the NCRFW and the NEDA joined efforts and expertise in putting together this publication, a step-by-step set of guidelines which gives some kind of assurance to planners, evaluators, monitors and implementors that indeed, there are ways of integrating gender concerns in every phase of the project cycle. These guidelines are general guideposts which can be used for all sectors. Users may very well adapt or develop these into sector-specific guidelines. Each section is self-contained and independent so that users can use it at any one time/stage of the project cycle.

This publication showcases another productive collaboration between the NEDA and the NCRFW. Technical staff from both agencies formed the writing team. In their very first workshop, the two groups each came with a proposed framework, different, but which later evolved into a comprehensive but double set of guidelines. Prior to finalization, this was subjected to a technical consultation/pre-test with staff coming from different departments who helped us refine the instrument.

We are confident that the present publication will prove useful to decision-makers, project planners and implementors in providing them with a firm basis for strengthening their efforts to address gender concerns in development.

We wish to take this opportunity to express our gratitude to the Canadian International Development Agency (CIDA) for providing financial assistance to this endeavor.

CIELITO F. HABITO
Director General
NEDA

REMEDIOS I. RIKKEN
Executive Director
NCRFW

Adopting such an orientation in the identification of programs and projects has implications on their effectiveness, particularly, in terms of reaching and addressing the needs of the appropriate beneficiaries.

As a 1991 UNIFEM study concluded, "History and experience show that so long as the different roles of women and men have remained "invisible" to development planners, efforts to achieve development have too often excluded women. The result has been the marginalization and undermining of women's productive roles both in the household and in the broader economic, social and political spheres. Women, have thus, in many cases been disadvantaged by development, and, through this, the development process itself has been slowed down and distorted."

Failure to consider women's roles in the household and in the community in development planning puts women at risk of losing certain opportunities that they need, such as training and livelihood. Development programs and projects must thus consider measures to enhance women's productive role without giving them additional work burden.

The need to adopt a perspective that takes into account the different roles, interests and needs of women and men in development planning is based on the Gender and Development (GAD) framework, a recent and major advance in development theory and practice. It has grown out of attempts to understand both the ongoing inequality between women and men and the failure of countless development and women's projects.

GAD has evolved from a concern with the on-going and increasing disadvantage of women despite almost two decades of Women in Development (WID) efforts. The GAD analysis looks beyond the functions of women and men in society, to examine the relations between them, and the forces that both perpetuate and change these relations.

The GAD approach not only seeks to integrate women into development, but also looks for the potential in development initiatives to transform unequal social and gender relations to empower women. A long-term goal of GAD is the equal partnership of women and men in determining and directing their collective future.

To be gender-responsive, development planning requires a re-examination of the roles traditionally ascribed to women and men in society and, subsequently, a careful redirection of efforts to ensure a more relevant formulation of a plan, program or project. This means defining the needs and problems of communities, households and families in relation to their effects on individual groups of women and men. Instead of traditional households or families as the focus of analysis, the distinct impact of development activities on women and men should be studied to achieve a more integrative approach to planning.

In this regard, there is an urgent need to reorient the entire project development cycle and innovate on measures that will facilitate the integration of gender concerns in the various stages of development planning and programming. Specifically, the Implementing Rules and Regulations (IRR) for RA 7192 or the Women in Development and Nation-Building Act provides that NEDA and the NCRFW shall jointly formulate a set of guidelines that will ensure the integration of gender concerns in all aspects of the project development cycle — from identification to post-project evaluation.

Major Issues/Gaps

Several issues continue to hinder the development of gender-responsive plans, policies and programs/projects. Among those identified are:

1. Inadequate understanding and appreciation of gender responsive planning among policy makers, development planners, and program implementors or managers resulting in the inadequate integration of gender concerns in the Development Framework of the MTPDP (1993-1998);
2. Varying levels and inconsistent compliance of line or implementing agencies to R.A. 7192 known as Women in Development and Nation-Building Act and its Implementing Rules and Regulations (IRR);
3. Inadequate guidelines and tools for the integration of gender concerns in development programs and projects, and for monitoring and evaluating the progress and impact of these programs and projects; and
4. Inadequacy of sex-disaggregated data and statistics as bases for planning and programming.

Objectives

The general objectives of these guidelines are the following:

1. to integrate the gender perspective in the current development planning process;
2. to ensure the implementation of the government's gender-responsive development programs and projects; and
3. to institute gender-responsive data generation and processing systems at the program/project level.

More specifically, the guidelines also seek to:

- *provide project developers, implementors and evaluators a useful tool and approach for integrating gender concerns into development programs/projects;*
- *increase the understanding of development professionals and activists on the gender variable and how it interplays with the development process; and*
- *ensure project efficiency and effectiveness.*

Features of the Guidelines

Putting to practice the Gender and Development theory has proved to be a formidable challenge to government, particularly the NCRFW and NEDA. This paper is part of the two agencies' joint efforts to link theory and practice. By providing guidelines for local planners and project evaluators and implementors, the NCRFW and the NEDA hope to ease the process of incorporating gender and development concerns in government programs and projects, and to assure planners that it can be done.

Description

These guidelines address the different stages of the project cycle, namely: project identification and preparation, investment program formulation, project evaluation, implementation and monitoring, and post-evaluation and impact assessment. For easy reference and applicability, they have been structured based on each stage of the project development process.

Efforts were exerted to make each section of the document as self-contained and independent of the other sections as possible. A user, therefore, may refer only to the particular component applicable to the phase of the project she/he is working on. The guidelines with all its components can however be useful to the user at any stage of the project development cycle, and cross-referencing across sections is encouraged to attain a fuller perspective.

Generally, each section of the document starts with a brief description of the process involved in every stage of the project. This is followed by guidelines on how gender concerns can be fully integrated in the process, with specific guide questions to help the user identify other relevant information and details.

To aid users in understanding these guidelines, a Glossary of Terms is found in the final section.

Applications

These guidelines are applicable to all types of programs and projects and are designed to be compatible with existing project guideposts and procedures.

Since these guidelines are a pioneering efforts in the country, they do not offer prescriptions, rather, they present issues and measures to be considered in each step of the project development process. Their application will be continuously monitored to ensure that they respond appropriately to the changing needs of development projects. Comments from users are thus encouraged to keep the guidelines updated and responsive.

Underlying Principles

This set of general guidelines subscribe to two basic assertions: 1) that gender is both an essential and critical variable in the "development equation," and 2) that the use and expansion of women's productive capacities are a necessary condition for social and economic progress.

Essentially based on the GAD theory, the guidelines make use of concepts or analytical tools which have been developed to guide development workers translate theory into actual practice. Conceptual tools such as gender division of labor, practical and strategic gender needs, the concept of condition vs. position and others are put forth throughout the document.

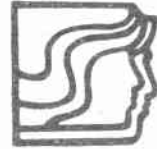
Users

As a primary tool to be used in project planning, implementation and evaluation, these guidelines' target users are mainly those involved in the project development cycle, namely: planners, project developers, managers and implementors, monitors and evaluators particularly in the public sector.

Agency Responsibilities

Because situations may change from one technical field or sector to another and based on the agency involved, these guidelines can only provide a general framework with broad indications of main points to be considered. They are general enough to be used in all planing sectors, including the economic and social sectors. Government agencies and local units are however enjoined to prepare and evolve more detailed checklists to take account of relevant factors within their regions and sectors.

Section 5 of the IRR for RA 7192 also tasks local government agencies with developing their own sectoral guidelines based on the issues and concerns distinct to their sector, to wit: "More specific guidelines have to be drawn vis-a-vis the requirements of the Local Government Code." This means the NROs and concerned sub-national development offices, may have to further translate these guidelines into more operational terms when necessary, for the adequate implementation of the R.A. at field levels. Also, government agencies are encouraged to improve on these guidelines based on the document's applicability and usefulness and to submit feedback to NCRFW or NEDA.



PROGRAM/PROJECT DEVELOPMENT

Project Identification

The initial phase of the project cycle is concerned with generating project ideas that represent a high priority use of the country's resources to achieve an important development objective. It is the process of searching for viable development initiatives aimed at responding to specific issues and problems.

Since development programs and projects address the needs of specific clientele groups, the target beneficiaries should, at the earliest stage of the project, be given equally important roles as those of other project team members or staff. This is to ensure that their concerns and interests are taken into account in all the critical phases of the project.

To ensure the viability of involving project beneficiaries in project identification given the time and human resource constraints of government agencies, the following requirements should be met:

1. Proponent agency has the mandate for the specific undertaking being proposed/ conceptualized.
2. Program/project areas have been defined based on:
 - results of existing researches/studies
 - national or agency development plans
 - monitoring reports
3. There are priority geographical areas being targeted, to include:
 - current coverage of the agency, institution or LGU; and
 - emerging priorities of the current administration both local and national
4. The proponent caters to the needs of distinct constituents, e.g., agrarian reform beneficiaries (DAR), farmers and fisherfolk (DA), disadvantaged/vulnerable groups (DSWD), etc.

5. Project staff has technical competence in project planning and community development activities.

Guide Questions:

- [1] Was project identification done in consultation and involvement with the community and its population groups?
- [2] What method was adopted in the identification of the project concept (secondary data, field visit, ocular inspection, consultation with the community)?

Following these basic requirements, the project identification process should, therefore, involve the following steps:

1. Identify key sources of information from formal (government, academic) and informal (NGO, private sector or community representatives) sources;
2. Identify the major characteristics of the target area and determine its population groups, both directly and indirectly targeted by the project. In particular, the following should be considered:
 - a) characteristics of the population groups by sex, age, socio-economic characteristics, and other special concerns (e.g. cultural, needs of the differently-abled, etc.)
 - b) characteristics of the community such as the size, location, socio-economic status/level or nature of organizations, participation of members in community activities by age and sex, resources available, and strengths and weaknesses;
 - c) patterns of major and significant activities and role structures (by age, sex, locus) and how these influence decision making among individuals in the community;
 - d) level of social cohesion as indicated by evidence of cooperation, coordination, factionalism, conflict, exploitation;
 - e) spirit of self-reliance as indicated by previous community initiatives.

Guide Questions:

- [1] Are the following considered in the identification of the target area population.
- [2] What is the composition of the community? Are there distinct subpopulations within the community? What is the degree of social cohesion in the community? Are there existing factions within the community?
- [3] What are the major roles/activities of men and women in the community?
- [4] What are the resources (human, financial, etc.) available in the community? Are these resources utilized by and easily accessible to the various population groups?

3. Identify, determine, or validate specific needs, problems and issues which contribute to the marginalization of particular groups or clusters within the program. Problems which may impact on the proponent's program should also be identified.

This should essentially involve consultations with the beneficiaries to ascertain the degree to which they perceive the problem or demand.

Guide Questions:

- [1] What are the needs, problems/issues of the community? What are the factors (socio-cultural, environmental, political, economic, etc.) that primarily cause these problems/issues?
- [2] Are the needs of one population group different from the others? What are the different needs of the various women and men in the community? Were there efforts to address these needs?
- [3] What are the major sources of information on the problems/needs and demands of the community?
- [4] Are the potential beneficiaries involved in the identification of the problems/needs and demands?
- [5] What are the major factors which contribute or impede the development of certain groups in the community?

4. Prioritize problems and concerns of the individuals in the community. Prioritization should be done on the basis of the following:
 - magnitude of the problem and its strategic implications on the different roles and interests of members of the community;
 - availability of resources (both existing and potential) other than those which will be provided by the proponent; and
 - the participants' existing and potential levels of readiness to contribute in order to become involved in a project.

Guide Questions:

- [1] Are the identified problems consistent with the present developmental concerns of the target population and the mandate of the proponent?
- [2] Which specific groups are most seriously affected by the problems?
- [3] What are the strategic implications of the problems on the different roles of the members of the community?
- [4] Are the practical and strategic needs of women and men considered in the prioritization? (Please refer to the Glossary for definitions of practical and strategic needs.)
- [5] Are there available resources (financial, human, structures) which could be utilized to address the problem?
- [6] What is the level of the community's preparedness to get involved in a project to address the problems?

5. Determine the appropriate set of interventions (starting with objective-setting) on the basis of the following:
 - criteria for problem prioritization;
 - data generated from the preceding steps and guidelines for project development;
 - potential impact of the interventions on individuals, communities and specific groups; and

- identified program areas and development plans (national and local).

Interventions must be comprehensive, coherent and logically-sequenced.

6. Determine the possible requirements (both financial and physical) of the project based on identified components.

Project Preparation/Formulation

Once problems and needs have been identified, assessed and appropriate interventions have been determined, the next stage in the project development cycle is the project preparation/formulation. This stage essentially determines whether the project can and should be undertaken and if so, how and when. In formulating gender-responsive projects, the following should be considered:

1. Project objectives should:
 - directly address the sectoral/regional program thrust and the gender issues therein;
 - have a quantifiable and reliable set of indicators that are gender-responsive;
 - address identified priority gaps/problems as they relate to the different needs of women and men and their varying characteristics; and
 - be doable, measurable and attainable within the expected life span of the project.

Guide Questions:

1. Are the objectives consistent with:
 - the prioritized problems identified, and
 - national and local development plans?
2. Are the objectives acceptable to the community and the decision-makers?
3. Will the objectives address the practical and strategic needs of women and men in the targetted areas?
4. Are the target groups clearly specified in the objectives? Are both women and men equally considered as project beneficiaries?

2. Project implementation strategies/activities should:

- be packaged taking into consideration the maximum use of available information sources on the problems, beneficiaries, resources, etc., considering the time/resource/administrative constraints of the government;
- include mechanisms for women's participation in the formulation of components and in project implementation. Such mechanisms should aim to:
 - redress skills/knowledge gaps that impede the effective participation of targeted beneficiaries; and
 - free women from multiple burdens that prevent their effective participation.
- provide for a set of minimum non-negotiable requirements to ensure gender-responsiveness of projects. This includes:
 - integrating gender concerns in the mainstream of the project;
 - generation of sex-disaggregated data;
 - raising women's economic, political and social position (to address issues on subordination, sexual division of labor, etc.)
 - installation of mechanisms which take into consideration time, load, skills and knowledge of women.

Guide Questions:

- [1] Are the strategies/courses of action sufficient and appropriate so that the objectives are met?
- [2] Will the project implementation strategies respond to the differential needs and potentials/capabilities of women and men?
- [3] Are there implementing strategies which will provide for mechanisms/opportunities for increased or more significant participation of women?

3. Resource requirements (human, financial, materials, machine, management) should be determined on the basis of the following:
- existing programs and personnel that provide the services envisioned;
 - availability of indigenous resources (human, etc.);
 - beneficiaries' readiness to contribute for the program/project.

Guide Questions:

- [1] Are community-based resources identified as part of the resource requirements?
- [2] Are the potential contributions of the community to attain project objectives clearly estimated?
- [3] Is there a clear allocation of resources for each activity/intervention?

4. The Project organizational structure should be set-up based on the technical needs of the project, particularly, in the areas of planning, community development, and gender and development. The structure should also be able to identify the interrelationships of the agencies, project staff and target beneficiaries involved in the project.

The set-up should be able to support the involvement of potential target beneficiaries in all aspects of project implementation.

Guide Questions:

- [1] Are other agencies or organizations which will have an indirect role in the implementation of the programs identified?
- [2] Are community members, women and men, identified as part of the organizational set-up?
- [3] Does the organizational structure include project implementors who have:
 - * awareness and sensitivity to gender-related issues,
 - * capability to identify, analyze, prioritize issues and needs,
 - * capability to carry out interventions that will respond to the differential needs of women and men?

5. The establishment of the monitoring and evaluation scheme should take into consideration the following:
 - development of a gender-responsive indicator system (pls. see attached sample list of gender-responsive indicators in Annex A);
 - participation of target clientele in the monitoring and evaluation;
 - methodology for evaluating whether the program activities impede or facilitate the participation and involvement of the targetted groups in the attainment of goals and objectives.

Guide Questions:

- [1] Is there a community-based monitoring system which would enable the communities to make critical decisions?
- [2] Is the monitoring and evaluation system designed to include gender-responsive indicators?
- [3] Are there measurable or quantifiable indicators that will reflect the equal and/or equitable enjoyment of project benefits/gains by both women and men beneficiaries?

Investment Program Formulation

An intermediate stage between program/project development and detailed project evaluation is the formulation of an investment program (IP) which generally involves the following:

- analysis of investment gaps and preferred sectoral/regional areas of public investment;
- deciding on the nature and size of several programs and projects to address gaps and to achieve a given set of goals (i.e. priority subsector or activities or PSAs);
- scheduling of project implementation taking into account the magnitude of financial resources that are expected to be available; and
- planning the financing of the IP by devising strategies to generate resources both from domestic and foreign sources.

In formulating the IP, the following should be considered:

On the selection and screening of programs and projects

- Inclusion of gender responsive priority capital forming and technical assistance projects (as provided by RA 7192);
- Consideration of gender responsive prioritization criteria as follows:
 - Promotes equitable access to and control of resources and benefits among women and men.

Guide Questions:

- [1] Does the project ensure equal/similar employment opportunities for women and men? Does it encourage women's participation especially in non-traditional occupations?
- [2] Does the project utilize technology that is appropriate to the specific needs of women and men? In the case of labor displacing techniques, does the project provide for adequate safeguards and/or alternative employment for women/men who would be displaced?
- [3] Does the project promote equal participation of women and men in the use and conservation of indigenous resources relative to the project?

- Strengthens participation of women and men in their own organizations and in development activities.

Guide Questions:

- [1] Does the project ensure equal participation of women and men in any organization and development activities (i.e., extent of involvement in terms of membership)?
- [2] Does the project promote and strengthen the participation of women and men not only as beneficiaries but as agents of change (e.g., educators, planners, organizers) in their own organization and in development activities?

- Utilizes structures and mechanisms in integrating gender concerns:

Guide Questions:

1. Is the project equipped with humanpower with sufficient understanding of GAD issues?
2. Is there a linkage with relevant agencies which implement women's programs and projects?

On the financing of programs and projects, the following should be considered:

- priority for gender responsive projects as provided for by IRR for RA 7192, and
- utilization and mobilization, on a cumulative basis, of domestic and foreign resources for gender responsive projects shall be monitored by the agency.

Project Evaluation

This stage involves an analysis of the technical, financial, economic, social and operational viability of the proposed project. It also involves an assessment of the potential impact of the proposal on the target area or beneficiaries. In evaluating projects and in ensuring that they are gender-responsive, the following guidelines should be adopted.

General

The project should:

- be consistent with national, sectoral or regional development thrusts and its implementations is within the mandate of the proponent or implementing agency;
- include objectives which consider and address the practical and strategic gender needs of the target beneficiaries;

- have project components and activities which address the assessed or identified needs of target beneficiaries and ensure that intended benefits would be realized (e.g., beneficiaries would have direct access to project components, activities, services, etc.). This, therefore, presumes that a specific needs analysis was conducted in the target area prior to project formulation;
- include indicators to determine gender-responsiveness of the project; and
- have a built-in gender-sensitive monitoring and evaluation system, the development and implementation of which should involve the participation of identified beneficiaries.

Guide Questions:

- [1] Is the proposed project consistent with the national development thrusts and within the mandate of the proponent or implementing agency?
- [2] Do project objectives incorporate gender concerns? Will the objectives address the needs of women? Will it improve the economic, social and political standing of women? Will the project help integrate women more fully into the community/development process or will the project isolate them further?
- [3] How can the project components or activities address the assessed and identified needs of target beneficiaries? How will the project activities affect the social and economic situation of women and their access to resources?
- [4] Does the proposal include indicators to determine the gender-responsiveness of the project?
- [5] Does the project have a built-in gender sensitive monitoring and evaluation system? Were the target beneficiaries involved in the development of such M & E system? Will the beneficiaries be involved in the implementation of the system?

Specific

In evaluating the technical aspect of the project the following should be considered:

- Appropriateness of the technology/ies to the needs, financial resources and technical know-how of women and men;

- Provision of an alternative program for women and men in case of labor displacement;
- Existing and proposed market outlets for goods and services to be produced; and
- Effect on the resources and time allocation of women for productive and reproductive activities.

Guide Questions on the technical aspect:

On Technology

- [1] Is the project introducing new technologies? Are these technologies primarily in fields which are traditionally dominated by men? If so, will they have an impact on women?
- [2] Will the new technology be appropriate for women? Does the proposed technology have potential negative effects on women? How does the project intend to counteract these effects?
- [3] Has there been a reallocation of women's work load or time and have the changes been positive or negative with the introduction of the new technology?
- [4] Will women be able to afford the cost of the new technology? Will women have access to credit opportunities to purchase equipment?
- [5] Will there be a significant increase in women's income or share of resources as a result of new technology in their community? Will there be a loss?
- [6] Are these technologies appropriate to the level of education and skills of women?
- [7] Were women consulted before these innovations were introduced?

On Marketing

- [1] What are the organizational arrangements for marketing? Are women responsible for marketing?
- [2] Are changes in marketing patterns or systems part of the project design? Is there a danger that these will reduce or eliminate women's role in marketing? If so, what steps are being taken to prevent this?
- [3] Does the project reflect the traditional position of women in marketing?
- [4] Does the project increase women's marketing workload and opportunities?
- [5] Does the project ensure that women get a fair share of the benefits from improved marketing activities?
- [6] Are women knowledgeable about appropriate marketing and bookkeeping techniques?
- [7] Does the project directly address women's marketing needs (e.g., transportation, equipment, facilities, etc.)?
- [8] Does the project encourage women to engage in cooperative marketing venture?

On Training

- [1] Will women receive training in the operation and maintenance of equipment and other technology introduced by the project?
- [2] Will training be offered at times and locations convenient to women, so as to allow their full participation? Will facilities, such as child care and transportation, be provided to increase their participation?

On Credit

- [1] Are credit facilities for women available through banks or cooperatives? Can women have access? (as heads of families/wives?)
- [2] Are women aware of sources of credit available, and will they receive training on how to apply for credit?

In evaluating the financial aspect of the project, the following should be considered:

- Financial viability of the project and the income position of women and men, and
- Adequacy of the appropriation or allocation of funds for gender-responsive components.

Guide Questions on the financial aspect:

- [1] Will the income of women/men increase or decrease as a result of the project?
- [2] What percentage of the project's budgetary requirements is allocated for components/activities which address the specific needs of women?

In evaluating the economic aspect of the project, the following should be considered:

- Economic viability of the project;
- Economic analysis which identifies the costs and benefits of the project to women and men; and
- Time allocation for the work of women and men in its cost and benefit analysis.

Guide Questions on economic aspect:

- [1] How much time is allocated by women/men in undertaking the project's various activities? What are the costs/benefits of such allocation?
- [2] How economically viable is the project?

In evaluating the social soundness of the project, the following should be considered:

- The compatibility of the project with the socio-cultural environment in which it is to be introduced (sociocultural feasibility). The assessment of sociocultural feasibility should take into account the following:
 - values, beliefs, social structure and organization of project beneficiaries;
 - context of the development measure;
 - perception of project beneficiaries regarding project benefits; and
 - understanding of the demands on project beneficiaries brought about by the project.

- The likelihood that new practices or institutions introduced among the initial project target population will be diffused among other groups (spread effect). To make this possible, the following should be considered:
 - social characteristics of the target beneficiaries (how they are organized, how they allocate their time and respond to incentives, their motivations, expected obstacles, communication strategies);
 - leadership/authority;
 - patterns of mobility;
 - previous project design and execution; and
 - maximum information and resource distances.

- The social consequences and benefits in implementing the project should identify as explicitly as possible the following:
 - groups of women and men whom the project intends to help;
 - those groups of women and men who are likely to be adversely affected; and
 - those groups of women and men who may be indirectly affected (either positively or negatively).

In assessing the social costs and benefits, the following criteria should be considered:

- access to resources and opportunities (including the ways and extent such access is broadened/narrowed);
- employment;
- rural displacement, migration and urbanization;

- changes in the political participation of the target group and the different socioeconomic, regional, ethnic and other groups as well as the implication of such changes on public policy.

In evaluating the institutional aspect of the project, the following should be considered:

- agency's technical and financial capability to implement the project;
- specific mechanisms to increase the participation of the target beneficiaries in decision-making and project implementation;
- inter-agency coordination or linkages (to avoid duplication of efforts);
- project's ability to generate other gender-responsive programs or projects; and
- specific mechanisms to ensure project's sustainability even after the funding assistance.

Guide Questions on the institutional aspect:

- [1] Does the agency have the sufficient humanpower, financial and equipment/ facilities to implement the project?
- [2] What are the mechanisms provided to ensure the participation of target beneficiaries in decision-making and project implementation?
 - Will the project prepare local groups, business organizations and financial institutions so that they will be willing to accept the active participation of women in the project?
 - What special measures have been taken to overcome constraints that prevent women from participating in the project?
 - What programs exist to organize women into self-help groups? Are these organizations represented and consulted in national and local planning?

Guide Questions:

- Are women given access to organizations, institutions and services?
 - Are women in the community being appointed to the project committee(s)?
- [3] Does the project have linkages with relevant agencies implementing women's programs to increase its impact and avoid duplication of efforts?
- What steps have been taken to set-up a committee for coordination of work among agencies at different levels?
 - Is there a mechanism to coordinate action for WID with and without the private sector?
- [4] How can the project positively influence and promote other gender-responsive programs?
- [5] What are the mechanisms provided to ensure that the project will be sustained even after the termination of funding assistance? Is the organizational and institutional capability sustainable?

List of Gender-Responsive Indicators

A. General Items

1. percentage of funds earmarked by sex;
2. percentage of funds spent on women and men;
3. implementation of the women's component of the project relative to the rest of the project; and
4. number and percentage of female relative to male heads of household in the project area.

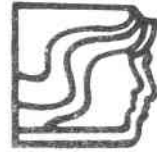
B. Project inputs and outputs

1. percentage of beneficiaries receiving direct project benefits by sex;
2. percentage of women and men receiving credit among the total beneficiaries;
3. percentage of receivers of agricultural inputs (e.g., fertilizers, insecticide, seeds, etc.) by sex;
4. percentage of farmers covered by extension services by sex; and
5. percentage of people trained by the project by sex.

C. Impact (to assess change)

1. income, expenditure and savings
 - (a) sources of income by sex;
 - (b) income differentials between women and men;
 - (c) income levels of the target population by sex;

- (d) control of women over family cash income; and
 - (e) expenditure and savings differentials between women and men.
2. health and nutrition:
 - (a) food consumption differentials between women and men
 - (b) access to health facilities for women and men
 3. access to land and production resources:
 - (a) proportion of land held by women and men;
 - (b) legal and traditional practices with regard to the ownership, inheritance and use of land, houses and other property, and production assets by women and men; and
 - (c) decision-making within households with respect to production and its disposal including marketing.
 4. employment and labour time allocation:
 - (a) total employment in major agricultural tasks in project area and its division by socio-economic status and sex;
 - (b) economic activity of women and men, including unpaid work in the family holdings (e.g., childcare, cooking and cleaning);
 - (c) part-time and seasonal employment of women and men; and
 - (d) secondary occupations of rural women (e.g., cottage industries) and men.



PROGRAM/PROJECT IMPLEMENTATION AND MANAGEMENT, MONITORING AND EVALUATION

Program/Project Implementation and Management

Project implementation and management involves the formulation of a project plan with the following components: a project execution system, a monitoring and evaluation system and an administrative support plan. The better and more realistic a project plan, the more likely is its being carried out and expected benefits realized. The plan emphasizes the need for careful attention to each aspect of the project cycle.

All gender-responsive activities, strategies and mechanisms identified in the project formulation stage should be actually implemented. Project management should have a clear guiding policy on the integration of gender concerns in the project implementation process.

Personnel

1. The terms of reference for project personnel should identify their responsibility in ensuring the participation of women and men as agents and beneficiaries of the project.
2. Women and men should be given equal opportunities to hold management positions (e.g., planners, managers, organizers, advisers, committee members, etc.) in various levels of project activity.
3. The project management and staff should have sensitivity to gender issues and concerns and should be provided with skills necessary to manage and monitor the gender dimension of the project.

Guide Questions:

- [1] Are there equal opportunities for women and men to participate in project management positions?
- [2] Are both women and men involved in the delivery of goods and services to the beneficiaries? In what ways are their involvement reflective of either traditional or non-traditional activities for both women and men?
- [3] Has management been provided with the human resources, awareness and expertise or skills necessary to manage and monitor the gender dimension of the project (e.g. provision of special inputs required by women)?
- [4] What training and extension techniques are being used to develop delivery systems that are responsive to gender concerns?
- [5] Are resources allocated to train project personnel on the specific skills necessary to ensure the inclusion of both women and men, in consideration of the nature of project activities?
- [6] Do the Terms of Reference (TOR) for project personnel state the responsibility of each one in ensuring the participation of women as agents and beneficiaries of the project?

Organizational Structure

1. The composition and mandate of the Steering Committee or any equivalent structure should be appropriate to support and monitor the participation of target beneficiaries (women and men) at various levels of the project.
2. The organizational structure of the project should permit and encourage the consultation and participation of relevant organizations and institutions (government agencies, women's organizations, local NGOs, etc.)
3. The project should identify appropriate support structures, facilities or arrangements (e.g. day-care center, a consideration of women's time constraints, etc.) to encourage the participation of both women and men in project activities.

Guide Questions:

- [1] Is the composition and mandate of the Steering Committee or any equivalent structure(s) appropriate to support and monitor women's participation at various levels of the project?
- [2] Do the organizational form or structure and the management arrangements of the project encourage consultation with, and the participation of, relevant organizations and institutions (government agencies, women's organizations, local NGOs, etc.)?
- [3] Does the project provide support systems, structures, arrangements and facilities for both sexes (e.g. day care centers) to protect their interest and encourage their participation in project activities? If not, how will this concern be addressed?

Operations and Logistics

1. The project should ensure equal opportunities for all beneficiaries (men and women) in all the project components (e.g. training and extension services, employment, access to credit, etc.)
2. The project should consider/address both practical and strategic needs and interests of women.
 - Practical needs are linked to women's present or existing condition. They can be readily identified as they usually refer to unsatisfactory living conditions and lack of resources (e.g. food, water, increased income). Meeting such needs through development activities can be a relatively short-term process.
 - Strategic needs, on the other hand, require long-term interventions and are related to improving women's position relative to men, e.g. empowering women to have more opportunities, greater access to resources, and equal participation with men in decision-making.

3. The project's operation and logistics should allow for flexibility in adapting to the changing or new-found situations of women.
4. The management information system should provide required information on project's operations to determine progress, benefit, effect of project on men and women and resources allocated to them.

Guide Questions:

- [1] What are the requirements for beneficiaries to be able to use the goods and services offered by the project? Can women meet these requirements (e.g. financial contribution, level of formal education, collateral, etc.)?
- [2] Are there mechanisms to ensure that the project resources or benefits are equally accessible to women and men?
- [3] Are the organization's delivery channels accessible to all beneficiaries in terms of personnel, location and timing?
- [4] Does the organization have enough flexibility to adapt its structures and operations to meet the changing or new-found situations of women?

For projects found not to be gender-responsive, corrective measures should be instituted for the remaining years of implementation. For this purpose, reference should be made to the items covered in the preceding guidelines particularly those pertaining to the project formulation stage.

Corrective measures may include but should not be limited to the following

- orientation and training of project personnel
- revision of project components/strategies to be able to reach both sexes effectively

support systems and facilities for women and men

Monitoring and Ongoing Evaluation

Monitoring involves an assessment of the progress of a development program or project. Included in the assessment is the identification of issues and problems encountered, with the end in view of facilitating the project's implementation.

On the other hand, ongoing and periodic evaluation is conducted to provide early feedback to project management on the following concerns:

- policies affecting the project
- attainment of sectoral goals and objectives
- adequacy of institutional arrangements
- appropriateness of project design and the level of resources

Moreover, evaluation provides a reflection on project activities and insights into factors that contribute to project success or failure, and allows planners and implementors to examine and learn from past experiences.

As part of the ongoing evaluation, a mid-program or project evaluation during the project implementation stage is undertaken to determine if the assumptions made regarding the project environment and target group are still valid (i.e. did improved road conditions lead to improved marketing?) The mid-project review also helps determine whether the project should be modified in light of environmental constraints. Furthermore, the review can determine how natural phenomena, local political events and national and international incidents have affected the project.

In monitoring and evaluating the gender-responsiveness of programs and projects, the following considerations should be taken into account:

- A systematic monitoring and ongoing evaluation mechanism with gender perspective as identified in the project design should be carried out.

Guide Questions:

[1] Data Collection and Analysis

- Does the project's monitoring and evaluation system explicitly measure the project's effects on women and men?
- Does it collect data which will indicate the access and control of resources of both women and men?
- Are the data collected with sufficient frequency so that necessary project adjustments can be made during the project?
- Are the data fed back to project personnel and beneficiaries in an understandable form, and on a timely basis to allow project adjustments?
- Are data analyzed so as to provide guidance to the redesign of the project as well as other related projects?
- Are specific policies related to project implementation (e.g. access to and control of resources of both sexes) identified?

[2] Are the data being monitored sex-disaggregated?

[3] Has the project identified the gender-responsive indicators to be monitored and the monitoring frequency (e.g. income levels of household heads)?

[4] Does the project include a midterm or annual evaluation?

[5] What mechanisms have been built into the project for corrective action on the basis of evaluation?

[6] Are copies of the final evaluation report given to project developers, implementors and national decision-makers to guide them on insights and lessons learned for future use?

- If the project's monitoring and evaluation system is not appropriate or if it has no built-in gender-responsive monitoring and evaluation system, one should be set up. In developing a gender-responsive monitoring and evaluation system, the following concerns should be considered:
 - Involve beneficiaries (women and men) in the development and implementation of gender-responsive monitoring and evaluation system (e.g. designating data requirements, collection and interpretation of data, etc.)

Guide Questions:

- [1] Are beneficiaries involved in designating data requirements?
- [2] Are beneficiaries involved in the collection and validation of data collected for monitoring purposes?

- Develop and identify gender-responsive indicators to be able to explicitly measure the effects and benefits of the project on women, men and target groups (e.g. increase in the time allocation of women with regards reproductive and productive activities and work).

There are two types of indicators that are usually used for monitoring and ongoing evaluation.

- Input indicators are those which measure the resources available for the program

Ex.: No. of women personnel to be involved in the project

- Output indicators are those kind and magnitude of results that can be expected from good management of inputs including activities

Ex.: No. of women trained/no. of women who participated in the project relative to men

- Identify and determine project effects (e.g. socio-economic, organizational, operational, etc.) on women, men and target groups.

*Guide Questions:***[1] Operational**

- Does the project have any negative effects on the beneficiaries (women and men) which were identified in the course of project implementation? If so, what attempts are being made to avoid, minimize or compensate those affected?

[2] Organizational

- Has the project led directly or indirectly to the establishment of a women's organization, group, co-operative or other institution or enterprise?

[3] Socio-Economic

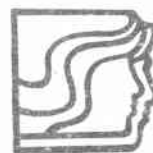
- What are the levels of participation among women and men in the decision-making and management of the project? How can the participation of both be enhanced at all levels of project implementation?
- What changes have resulted from women's involvement in the project in terms of:

(a) work	(c) local community
(b) home	(d) society
- Have income-earning opportunities for project participants/beneficiaries (both sexes) increased or decreased?
- What are the effects on target groups in terms of cash income?
- Are women's roles and responsibilities changing as a result of the project? In what way? How is the project contributing to these changes?
- Are women's access to, or control of, the following resources changing as a result of this project? In what way? How does the project contribute to these changes? (e.g. formal education, food and nutrition, etc.)
- Are women being given access to the new opportunities and services which the project provides? If not, why not, and can this be rectified?
- Has there been a reallocation of women's work load or time, and have the changes been positive or negative?

Institutionalize the designed gender-responsive monitoring and evaluation system into the project.

Guide Questions:

- [1] Are appropriate control procedures in place to operationalize the designed monitoring and evaluation system?
- [2] Are concerned project personnel and management appropriately informed and trained on the use and importance of the designed monitoring and evaluation system?
- [3] Are the necessary logistics and support structures in place for the operation of the designed monitoring and evaluation system?



POST EVALUATION

Post-evaluation involves the systematic and objective assessment of completed development projects. It may be undertaken at the end of the project or sometime thereafter. It examines project outcomes and the underlying factors which contribute to the project's success or failure, in order to pinpoint the features that deserve replication in future projects and to identify the pitfalls to be avoided.

Post-evaluation is carried out to: 1) determine whether the set objectives and targets were attained; b) evaluate project efficiency; c) assess project effects and impact, including their potential to be sustained in the longer-term.

To be gender-responsive, a post-evaluation should discuss the extent to which the interests, roles and needs of women and men have been taken into account and affected by the project (as identified in the project identification and formulation stage).

When conducting a post-evaluation of projects, the following items need to be assessed:

1. The project's contribution to the promotion of the national goals/thrusts on gender and development (GAD).

The country's thrusts on GAD are based on the premise that the culturally-defined roles of women and men have reinforced unequal gender relations, resulting in the marginalization of both sexes, especially women. The GAD approach seeks not only to fully integrate women into the development process, but also to continually search for new and innovative measures that will help transform unequal social/gender relations into creative opportunities to equally benefit women and men.

Guide Question:

- Was the project consistent with the national thrusts on gender and development as outlined in the national plan or other national documents? If yes, in what way? If no, why not?

2. The extent to which the interests, roles and needs of women and men were considered in the different phases of the project cycle.

Guide Questions:

- [1] Were results of the pre-project study used in making the project relevant and equally beneficial to women and men?
- [2] Did the objectives of the project address gender concerns? Did they take into account women's roles as agents and beneficiaries?
- [3] Did the project design establish gender-related goals and objectives against which project performance or success was to be evaluated?
- [4] Was the potential impact of the project on women and men anticipated? Were approaches considered and carried out to minimize and avoid any negative effects?
- [5] In designing, outlining the project activities and components, were gender concerns considered? For example, in determining specific project sites, were women's time and spatial constraints taken into account to ensure their participation in the project? Were support structures/systems (e.g., child care services) provided to enable women to actively participate in project activities?
- [6] Did the project address the practical gender needs of women and men? Did the project consider the strategic gender needs of the community, in general, and women, in particular? (For definitions of practical and strategic gender needs, please refer to the Glossary section.)
- [7] Was the technology introduced or developed, if any, appropriate to the needs, financial resources and technical know-how of women and men?

3. The nature and extent of project effects on the roles, interests and needs of women and men.

Areas to be examined when evaluating project impact (effects/outcomes) on women and men may include the following:

- time allocation/work load
- access to and control over resources and benefits (Please refer to the Glossary for the definitions of access and control.)
- social and economic position (Please refer to Annex B for a sample list of indicators of improvements in women's position.)
- skills/technical know-how
- level of empowerment

Guide Questions:

- [1] What were the effects of the project on the time allocation of women and men for productive and reproductive activities? Had the effects been positive or negative? Did the project increase or decrease women's and men's work load? (Please refer to the Glossary section for definitions of productive and reproductive work.)
- [2] How and to what extent did the project contribute to improving the conditions of women and men? How and to what extent did it contribute to improving women's position in society? (Please refer to the Glossary for definitions of condition and position.)
- [3] Did women receive a fair share, relative to men, of the benefits derived from the project? Did the project redress a previous unequal sharing of benefits?
- [4] To what extent did the project affect women's and men's access to and control over resources? For example, how many women, relative to the number of men gained or lost access to: land, housing, market centers, training, credit, etc.? (Please refer to the Glossary for the definition of access and control.)
- [5] To what extent did the project affect women's and men's access to and control over benefits? How many women, relative to the number of men, gained or lost control over: wages, revenue from services/sale of goods, new technology, etc.?

Guide Questions:

- [6] What effects did the project have on the socio-economic status of women and men? For example, how many local women gained or lost roles in the local economy and jobs at the different levels of the project?
- [7] What effects did the project have in the transformation of gender relations. Did the project contribute to the transformation of relations between the disadvantaged and the advantaged? In what way? Did the project tend to reinforce or challenge the existing gender division of labor? (For definitions of gender, transformation of gender relations, and gender division of labor, please turn to the Glossary.)
- [8] What are the long-term effects of the project in terms of women's increased ability to take charge of their own lives, understand their situation and the difficulties they face, and to take collective action to solve problems?
- [9] Did the project result to women's and men's gain or loss in terms of:
- workload
 - economic and social position
 - gender relations
 - level of skills
 - access to and control over resources and benefits
 - level of empowerment

Annex B**Sample List of Indicators of Improvements
in Women's Position***

1. increased acceptance by women and men of women as community decision-makers;
2. greater personal and economic independence and self-confidence for women;
3. increased women's involvement in personal, family or community development;
4. new, more visible, and more effective women's organizations;
5. more women in education and training programs;
6. improved health of women and children;
7. improvements in women's legal status;
8. a decline in violence against women;
9. increased women's control over their own fertility;
10. reduced institutional discrimination and bias against women;
11. increased public awareness of women's issues.

* Indicators of improvements in women's position are usually less obvious than improvements in condition. Since they are more qualitative than quantitative, they are also harder to measure.

GLOSSARY OF TERMS

1. Access vs. Control

Access is an opportunity of a person to make use of certain existing resources (political, economic resources, time).

In contrast, control is the ability of a person to define the use of given resources and impose that definition on others.

2. Condition vs. Position

Condition refers to women's material state - their immediate sphere of experience. If you ask a woman to describe her life, most likely she would describe her "condition": what kind of work she does, the needs she sees for her and her children (clean water, food, education), where she lives, etc.

On the other hand, position refers to women's social and economic standing relative to men. It is measured, for example, by male/female disparities in wages and employment opportunities, participation in legislative bodies, vulnerability to poverty and violence, and so on.

3. Equity vs. equality

Equity is a concept of distributive justice which is remedial, and is intended to overcome bias, favoritism, and inequalities. Activists prefer equity to equality as an aim because it is sensitive to differences between the sexes and to a changing, rather than rigid, social environment.

4. Gender vs. Sex

Sex is the genetic and physical or biological identity of a person which indicates whether one is male or female.

Gender, on the other hand, refers to socially learned behavior and expectations associated with the two sexes. Thus, whereas maleness and femaleness are biological facts, masculinity and femininity are culturally constructed attributes. Gender also refers to the socially differentiated roles and characteristics attributed by a given culture to women and men. In short, all differences besides the strictly biological.

5. Gender-Based Analysis in Project Development

Based on the framework developed by a group of scholars from Harvard University, it refers to the assessment of policies, plans or programs in a structured way to determine if these are gender-sensitive; a systematic effort to record the predominance or participation rates of men and women respectively, in a set of activities that constitute a production system.

6. Gender Division of Labor

A structure created when society assigns/allocates different tasks, roles, responsibilities and activities to women and men according to what is considered socially and culturally appropriate.

7. Gender Issues/Concerns

Issues, concerns and problems arising from the different roles played by women and men, as well as those that arise from a questioning of the relationship between them.

8. Gender-Responsive Indicator System

A set of statistical measurements for monitoring the situation of women, relative to men in various sectors and for determining whether development programs respond to their problems and needs.

9. Gender-Responsive Planning

Also known as Gender Responsive Development Planning, it is simply the use and integration of the Gender and Development (GAD) framework into the entire development planning cycle. It rests on the premise that introducing gender considerations makes development planning/programming more "people oriented or people focused." Gender is one source of heterogeneity along with education, ethnicity, class and other socio-demographic variables, all of which determine to a large extent the manner by which development plans and programs/projects impact on different groups of people.

10. Gender-Responsive Programs/Projects

These are programs and projects that systematically incorporate or address gender concerns. They are of three types: a) integrated programs or projects; b) women's components; c) for women only programs or projects.

11. Gender Roles

These concern the activities ascribed to men and women on the basis of perceived gender differences. While men are mainly identified with productive roles, women have a triple role: a productive role; a reproductive (or domestic) role; and a community managing role. Gender roles and responsibilities vary between cultures and can change over time.

12. Mainstreaming Gender Concerns

Integration of gender concerns in the development agenda in order to address gender inequalities.

13. Marginalization

Negative term used to denote how certain development approaches tend to limit interventions to traditional programs and projects women's participation in the development process. These interventions are those related with maternal and child care, day-care centers and nutrition activities, among others. This perspective maintains women's concerns within these traditional areas so that their needs and potentials in other areas, particularly in the economic sectors, remain unrecognized. Hence, women's full development as a distinct resource of society is not achieved.

14. Multiple Burden

A condition experienced by a person (usually women) when limited time and energy is devoted to several tasks/responsibilities. Most women experience multiple burden as when they are expected to take care of the children and the household chores on top of their formal or informal employment.

15. Practical vs. Strategic Gender Needs

Practical gender needs have to do with what people need to perform their current roles more easily, effectively or efficiently and they can usually be identified by people themselves. An example of this need is lack of resources like health and education services, food, fuel and water sources, etc. Measures to address these needs may preserve or reinforce traditional gender relations.

Examples of Actions that Address Women's Practical Needs:

- Reducing their workload, for example: the convenient location of hand-pumps; developing fuel-efficient stoves.
- Improving health, for example: primary health centers; child spacing/family planning advice; clean water supply.
- Improving services, for example: primary schools; transport facilities; housing infrastructure.
- Increasing income, for example: skills training; credit groups; access to market.

By contrast, strategic gender needs are concerned with changing the subordinate (disadvantaged) position of women in society.

Examples of Actions that Address Women's Strategic Needs:

- Improving education opportunities, for example: adult literacy classes; female teachers provided as role models; gender neutral textbooks.
- Improving access to productive assets, for example: legal status on land ownership; rights to use common property; bank accounts.
- Allowing women to take part in decision making, for example: local committee membership; participation in elections; establishing and supporting women's groups.
- Allowing equal opportunities for employment, for example: access to jobs traditionally done by men; equal pay for comparative jobs even if there is a gender division of labor.

16. Productive Activities

This involves the production of goods and services for consumption and trade (farming, fishing, employment and self-employment). When people are asked what they do, the response is most often related to productive work, especially work which is paid or generates income. Both women and men can be involved in productive activities, but for the most part, their functions and responsibilities will differ according to the gender division of labour. Women's productive work is often less visible and less valued than men's.

17. Reproductive Activities/Work

This involves the care and maintenance of the household and its members including bearing and caring for children, food preparation, water and fuel collection, shopping, housekeeping and family health care. Reproductive work is crucial to human survival, yet it is seldom considered "real work". In poor communities, reproductive work is, for the most part manual - labour-intensive, and time consuming. It is almost always the responsibility of women and girls.

18. Resources and Benefits

As used in Gender and Development theory, resources include: a) economic or productive resources such as land, equipment, tool, labour, cash and credit, employable or income-earning skills, employment or income-earning opportunities; b) political resources such as representative organizations, leadership, education and information, public-sphere experience, self-confidence and credibility; and c) time which is a particularly critical and scarce resource for women.

On the other hand, benefits include: provision of basic needs such as food, clothing and shelter; cash and income; asset ownership; education and training; political power, prestige, status, and opportunities to pursue new interests.

19. Transformation of Gender Relations

This involves changing the way women and men relate to one another from that of domination/subordination to that of equality and empowerment.

20. Women in Development

A development framework or approach which gives recognition to the distinct needs and capacities of women with considerable focus on developing strategies and action programs that will facilitate their participation in the productive sector.

Economic Planning Terms

1. Capital Assistance

Financial support intended to implement a major investment scheme or project which results in the accumulation of funds used for business.

2. Donor Country Program

A multi-year framework of country-focused cooperation efforts which involve the proposed use of a donor's resources to pursue selected national development objectives within an indicated period.

3. Economic Viability

The possibility or likelihood that the proposed project will contribute significantly to the development of the total economy, such that the project's use of scarce resources is justified. The analysis is applied to estimate the project's returns to society as a whole.

4. Financial Viability

The monetary aspect of project preparation and analysis, which estimates the project's effect on the income of project participants.

5. Investment Program

A program that prioritizes capital formation and technical assistance activities consistent with sectoral and regional thrusts.

6. Technical Assistance

Support aimed at imparting technical, economic, and organizational skills and knowhow and improving all that is needed to effectively apply the knowledge/skills required.

Writing team**NEDA**

Marietta Adriano
 Ma. Piedad Geron
 Iona Carracedo
 Thelma Cruz
 Sandra Herrera
 Metis Ilagan
 Zenaida Leonardo
 Pamela Quizon
 Nenita Retiro
 Melissa Santiago

Mayumi Juris Luna
 Ma. Cristina Gonzales
 Mayvelyn Remigio
 Lorenza Umali
 Imelda Abella
 Ma. Asuncion Moral

Technical Presentation

Eufrosina O. Dumlao
 Anita E. Baleda

NCRFW

Remedios I. Rikken
 Myrna I. Jarillas
 Ermelita Valdeavilla
 Socorro Diaz
 Manuela M. Silva
 Rosanita Serrano

Cover Design

Leo Trinidad

Staff Support

Rodrigo E. Aldiano
 Leona A. Masilang
 Emorie Muyot

National Commission on the Role of Filipino Women

1145 J.P. Laurel St., San Miguel, Manila

Tel. Nos.: 735-4955; 735-1864

Fax No.: 735-1655

E-Mail: ncrfw@mnl.sequel.net