Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management

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I Improving problem identification: refocusing traditional tools

Wealth Ranking*

Definition

A card sorting exercise to elicit information from key informants about local socioeconomic distinctions.

Purpose

To devise a sample of households which is representative of the community's different socioeconomic groups.

Materials

Cards, each with the name of a household of the community. If all households are not included, then a random sample should be used.

Approach

Interview both male and female informants independently; about four or five in total should suffice. Ask each to separate cards with family names into piles according to the informant's notion of the household's relative level of well-being. Following the card sorting, the researcher and informant discuss the characteristics associated with each pile the informant has made, and the reasons for assigning a household to a particular cluster.

Value

Important indicators about socioeconomic strata within the community are determined by both male and female residents, and not by the researchers. Analysis of the results assures that the households selected for household and confirmation surveys represent the range of socioeconomic circumstances found in the study site. Researchers may also control for ecological circumstances by dividing families into agro-ecological zones to ensure representation from each zone.

Wealth ranking helps the researcher as well as the project officer begin to see the ways gender roles and socioeconomic class interact in rural communities. Evidence from ECOGEN case studies reveals that changing economies and environmental crises have significant implications for both women's and men's work. Control over resources varies greatly according to both class and family structure.

The following household descriptions, derived from a wealth ranking activity, illustrate both the subtle and dramatic differences among households within a small community. They suggest why community members themselves can best define and interpret patterns of local socioeconomic stratification.

Two Kenyan Households: The Mongotes and the Ndonyes

Mr. and Mrs. Mongote saved money from Mr, Mongote's shop to buy the eight acres on which they now live. Between the shop and their 1300 coffee trees, the Mongotes are able to generate enough cash to meet important household needs. Mr. Mongote manages the shop and the trees. Mrs. Mongote cultivates the food crops, and together they share management of their farm. Recently the family sold a small piece of land in order to provide schooling for their children.

Theresa Ndonye, a neighbor of the Mongotes, is a widow. She supports her three children by farming herquarter acre farm, seeking off-farm labor, and weaving baskets. Theresa's daughter is a single mother; her older son is in Nairobi seeking employment; and the younger son is in primary school. They grow some food and have 100 coffee trees, but the food they grow lasts only one month. To buy the rest, Mrs. Ndonye cultivates other people's land, picks coffee, mulches, and weeds. Her average earnings for a day's work are less than \$1,00. Mrs. Ndonye is typical of a growing class of households functioning virtually as landless agricultural laborers, vulnerable to the vicissitudes of casual employment opportunities (Asamba and Thomas-Slayter, 1991).

Because of their relative wealth, families like the Mongotes are easily identified and usually accessible to researchers or project officers to discuss the community's situation and needs. The Ndonyes are struggling to survive and are often too busy to attend community meetings where development issues are discussed. Such families (particularly female-headed households) may remain invisible with their needs unrecognized. Thus, their concerns are not readily included in development projects. The wealth ranking process assures that information about all types of households is incorporated into problem identification and project design

II In-depth Household Interviews

Definition

A discussion with the adult male and/or female in charge of the household.

Purpose

To uncover how gender is a variable in the livelihood strategies of individual households, particularly in terms of natural resource management, and to permit respondents to explore the household's linkages with the broader social, economic and ecological systems in which it resides. It is important to hear both men's and women's perspectives. In general, it has been much easier to interview men and to obtain their viewpoints. Household interviews should address this disparity by assuring that at least half the interviews are with women.

Materials

Notebook and pen. In some instances a tape recorder might be useful.

Approach

Informal interviews or discussions of 45 minutes to one hour. Researchers may include a wide range of topics depending on the circumstances in the study site: household composition; socioeconomic status; gender division of labor and decision making in the household; gender basis of use, access, management, and control over family resources. If the male respondent is dominating the discussion, suggest that there are topics related to women's perspectives on environmental issues, health, and child care which you would like to discuss with the woman alone. If this approach is not successful, schedule a follow-up meeting with the wife, ideally outside the home, in a work site. See page 16 for a discussion of participant observation, a time for informal discussions.

Households may be selected randomly from the categories generated by the Wealth Ranking exercise. They may be identified by key informants and selected according to the researcher's criteria; or a planner may select them on the basis of points raised during general community meetings.

Value

In-depth understanding of a household with opportunity for follow-up discussion and analysis of important issues.

The following chart Provides examples of the kinds of information obtained through household interviews in several of the ECOGEN research sites.

Gender-Sensitive Information about Resource Management Gained Through Household Interviews

In South Kamwango, South Nyanza District, Kenya

- changing patterns of allocation of labor among women in polygamous households including agriculture, water and firewood collection
- attitudes on public health issues including construction and use of latrines, childhood diseases, infant mortality

In Napo, Siquijor, Philippines

- details on the different uses of Napo's small remaining forest by both men and women to supplement their incomes
- complex land tenure and inheritance patterns involving both male and female siblings which under some socio-economic circumstances undermine sustainable management of land resources

In Ghusel, Lalitpur District, Nepal

- changing responsibilities and labor allocation for women with the introduction of water buffalo for milk production approximately ten years ago
- differences in men's and women's attitudes toward resource availability

In Linaca Region, Choluteca, Honduras,

- Impact of male seasonal and permanent migration on the women and children remaining behind
- The wide range of medicinal plants used traditionally and the changing gender-based knowledge and use patterns regarding these plants

III Focus Group Discussions and Other Group Interviews

Definition

A small group meeting to discuss a specific topic in an informal setting in which all present are encouraged to offer ideas and opinions.

Purpose

To provide an opportunity to explore gender roles in various aspects of community life, and to understand the diversity of perceptions and opinions about this topic. Focus groups may also be used to generate history timelines for communities, to diagram men's and women's perceptions of community institutions, and to make trend lines for resource issues such as rainfall, crop production, population, deforestation, and health.

Materials

Notebook and pen, occasionally a tape recorder. Large paper for charts and colored markers are necessary for making time lines, diagrams, and trend lines; circles of various sizes are needed for the community institution perception exercise. It is useful to have two people so that one can facilitate the discussion and the other can record information.

Approach

Researchers or project officers become facilitators and participant observers. Time, place, and topic for discussion are established a few days to a week ahead of time. Participation in a focus group can be based on political boundaries (neighborhoods), formal or informal community organizations, and government or community-sponsored projects. Facilitators must be adept at including people in the discussion and assuring that the full range of voices is heard. Meeting with men and women in separate groups may bring out issues obscured in joint meetings. It is also useful to listen to residents from different age groups, ethnic groups, or classes. Focus group discussions conducted throughout the data collection process allow the development practitioner to build upon discoveries and deepen his/her understanding of gender-based responsibilities in managing resources.

Value

Focus group discussions provide a forum for in-depth discussions of issues which arise in household interviews as well as clarification of the diversity of perceptions and opinions found in the community. As indicated by the illustrations which follow, focus group discussions can be useful to show:

- gender-based priorities for community action
- the level and nature of resource awareness of both men and women
- perceptions of women and men on institutional effectiveness.

Gender-based Priorities for Community Action in Kenya

In Pwani sublocation, Nakuru District, Kenya, a Participatory Rural Appraisal exercise did not reveal the scope and severity of the fuelwood problem until women had an opportunity to meet separately in a focus group to examine that issue. The "important problems" identified by male leaders in the community included roads and access to health care. Women's issues, such as access to fuelwood, were not considered germane to the process until the focus group discussion brought them to the forefront (Rocheleau et al., 1991)

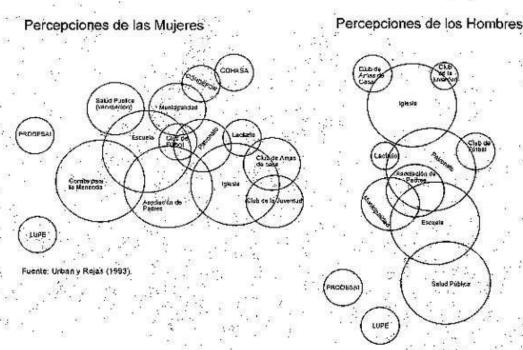
Gender, Resource Awareness, and Mangroves in the Philippines

Focus group discussions can clarify the community's level of awareness in regard to resource degradation and can provide a means for gathering baseline data on existing resource management practices. Discussions also help community members to understand their own roles in resource degradation, to recognize alternatives, and to consider collectively the opportunities and constraints for changing current behavior patterns. Because of the potential sensitivity of topics, it is crucial that the facilitator be knowledgeable about community resource issues and cultural contexts as well as adept at working with a group. A conversation between a group facilitator and community members on the use of mangroves is illustrative.

Facilitator (F)	What is your source of fuel for cooking?						
Community Member (CM)	Mostly mangroves; some brush.						
F	Who gathers the mangroves?						
CM	Mostly women and children.						
F	Why do you use mostly mangroves?						
CM	Because the mangroves are nearby and the fuel burns hot and long.						
F	How is your supply?						
CM	Dwindling. (Stories may come out about how there used to be plenty of wood, but now there is little.)						
F	Why is this so?						
CM	Because there are more people in the community now. But we need to cook our food.						
F	Has the diminishing supply of mangroves increased the time women spend collecting fuelwood?						
CM	Not yet, but we are worried that this may happen soon.						
F	What will happen when there aren't any more mangroves?						
CM	We need the mangroves. (Discussion will probably lead to the other benefits of mangroves besides fuelwood including their role as the nurseries for small sea life and the protection they offer from storms.)						
F	What can we do? What should be done?						
CM	There are other mangroves but they are more than 10 kilometers away, Maybe we could use more coconut fronds, or we could replant our mangrove area so there is enough for all.						

In this way, the researcher/facilitator gathers information about howthe community perceives the resources, and also generates valuable discussion among the participants. Meeting separately with men and women is likely to yield a more comprehensive discussion of the issues. (Ututalurn, 1993)

Figura 1. Percepciones de mujeres y hombres de instituciones en El Zapote, Honduras



Una ilustración desde Honduras demuestra la importancia de recopilar información de hombres y mujeres sobre las instituciones y las organizaciones existentes desde que se empieza a trabajar con una comunidad. A los grupos de residentes se les solicita clasificar las instituciones de la comunidad en orden de importancia (representadas por el tameño del círculo) y construir diagramas que indiquen las relaciones entre y con los diferentes grupos de la comunidad. Las discusiones de grupos de enfoque, que generaron el diagrama anterior, mostraron que hombres y

mujeres clasificaron en forma muy diferente la relevancia de los grupos de la comunidad pare el bienestar local. Para detalles de como conducir las discusiones de grupo de enfoque sobre las percepciones de las instituciones de la comunidad, véase NES et al., Participatory Rural Appraisal Handbook, 1990. El ejércicio se ha modificado aqui para incluir las diferencias de genero. Una mayor diferenciación posterior es posible a través de las lineas socioeconómicas.

PRODESAI - Vecinos Mundiales (Comité Local) LUPE - Proyecto Mejoramiento del Uso y Productividad de la Tierra (USAID-GOH) COHASA - Cooperación Hondureña-Alemana para la Seguridad Alimentaria

IV Participant Observation

Definition

This activity involves accompanying respondents as they carry out daily responsibilities.

Purpose

To observe and gather data about men, women, and children in their daily lives. Observing respondents "on the job" allows an understanding of the constraints and opportunities for resource use at the household level, and illuminates intra- household relations (Rocheleau, et al., 1988).

Approach

Arrange to join a respondent for part of the day to help, observe, and talk as he or she works. Follow-up visits based on need to observe different activities or seasonal responsibilities are useful.

Materials

Vary according to the task at hand and how useful you think you can be. Otherwise, notebook and pencil.

Value

Participant observation enables the researcher to gain in- sights into matters which arise, not on the basis of an interview or survey schedule, but because of the specific circumstances of the respondent. It can uncover activities which might have re-mained hidden to researchers relying on surveys. It also facili-tates the gender mapping exercise discussed next.

Participant Observation and the "Pakho" System in Nepal

In Ghusel VDC, Nepal participant observation led researchers to a more complete understanding of householdand community arrangements for fodder collection. "Pakho" is an informal system of managing forest and fodder on government "wastelands" (once forested, now barren). Villagers plant the "wasteland" with species to meet household fuelwood and fodder requirements, thereby converting it to private property. This system became apparent to the researchers only after spending time collecting fodder with women from Ghusel's households.

Over the past ten years, milk production using stall-fed water buffalo has become a key livelihood strategy for most households in Ghusel. Women have primary responsibility for gathering fodder for these animals. The emergence of the "pakho" system is central to the gender-basis of resource management in Ghusel, Direct observation of "pakho" helped clarify size, fodder density, and collection time, as well as marked differences in "ownership" and size of "pakho" land based on caste, ethnicity and economic status (Koirala, et al. 1993).

V Improving Project Design and Implementation: New Techniques Specific to Gender

Gender Resource Mapping*

Definition

The 'gender map' represents men, women, and children as distinct land user groups and thereby clarifies the intra-household division of control (C), responsibility (R), and labor (L) of resources and related activities.

Purpose

To present the rural landscape as an arena of complementary and/or conflicting relationships between men, women, and children in regard to natural resources.

Materials

Poster-size paper and markers to draw a map of the household and its resource base.

Approach

Work closely with individuals representative of major household types, socioeconomic strata, and agroeco-logical zones in a community in order to understand the division of C, R, and L of resources and activities both within a household and also between households of different socioeconomic circumstances. By mapping the major socioeconomic strata one learns how the gender divisions and land use change according to class.

Value

Women and men make very different use of resources even, in some cases, of a single species of tree. Therefore, it is essential for development planners and researchers to understand the "domestication" of the rural landscape. Gender mapping is also valuable because it offers a tangible representation of the landscape (in terms of C, R, & L) which can be presented to community members for their feedback.

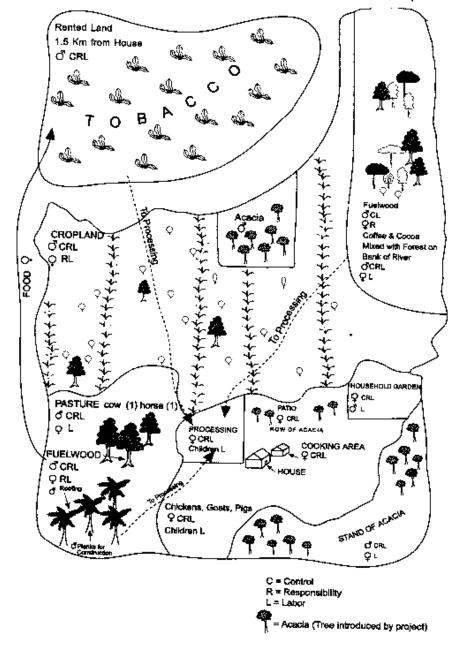


Figure 2. Gender Resources Map from Zambrana, Dominican Republic

Source: Flocheleau and Rose, 1993.

VI Confirmation Survey

Definition

A short survey to confirm the findings from other methods used and to ascertain the breadth of the findings within the community.

Purpose

To determine the variety and concurrence of the opinions and conditions among residents as revealed through the household interviews and focus group discussions, and other tools. Surveys can also be used to probe further on a particular topic, such as water problems.

Materials

A form that can easily be duplicated to facilitate administering the questionnaire.

Approach

The survey is administered to a random sample of respondents from the community. Questions are structured to capture differing responses with particular attention to differences based on the gender variable. The box below illustrates some of the questions used in the Philippines to obtain information on the range of gender and age based economic responsibilities and on gender in relation to land inheritance.

Value

Assures validity of findings. Provides statistical data to support and lend legitimacy to findings. May also refute or shed doubt on some findings.

Figura 3. Preguntas de muestra de una encuesta de confirmación utilizada en la Isla Siguijor, las Filipinas.

	Esposo: Esposa: Niño: Niña:	a. b. c. d.		algas marinas conchas del mar ganado otros					
	Otros miembros del h	20752	Procuas						
2.	¿Trabaja en las fincas de otras personas?								
	Esposo: S N Niño: S N Otro_: S N		Esposa: S N Niña: S N						
3.	¿Posee tierra? S_N_ ¿Cómo la adquirió? ventaTi ¿A nombre de quién está la tierra?			-					

Fuente: Shields y Thomas-Slayter, 1993.

VII Gender- Disaggregated Seasonal Activities Calendar*

Definition

A calendar that identifies livelihood tasks and categorizes responsibilities by season, gender, age, and intensity of activity. It highlights community constraints such as drought or flood seasons, hungry periods, or even local cultural events, which should be factored into project planning.

Purpose

To generate information on the gender-based division of labor and responsibilities in livelihood systems and resource management.

Materials

Poster board or large roll of brown paper, magic markers.

Approach

Input is elicited from both men and women in focus groups or from key informants. Calendars specify the usual activities and responsibilities of household and community members, including children, throughout the year. Calendars will vary according to socio-economic status; researchers need to be attentive to this variation.

Value

Assists project planners and managers in anticipating the best timing for work with a local community. The seasonal calendar helps planners analyze various local indicators and both men's and women's changing responsibilities.

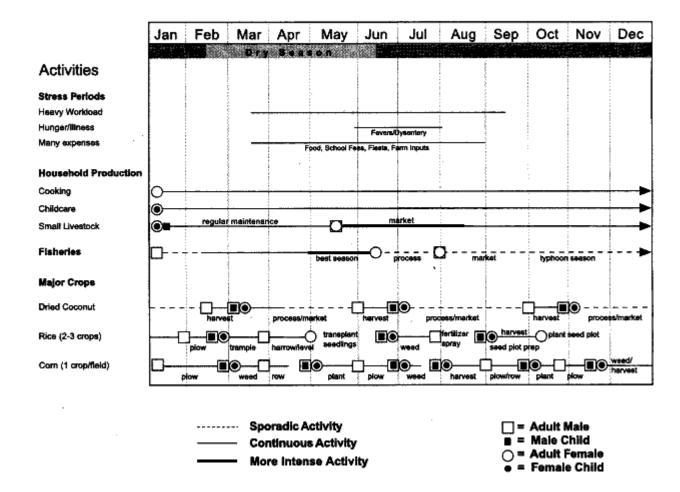
Seasonal Responsibilities for the Pabalays on Siquijor Island, The Philippines

The seasonal calendar clarifies the best times of year to work with families who, like the Pabalays in the Philippines, have multiple demands on their time, varying according to the season.

Eugenia and Tirso Pabalay have nine children. Their marginally productive land provides vegetables for only seven months. To purchase food for the remaining five months, Tirso fishes while Eugenia and the children raise small livestock and sell the extra fish. Eugenia and the children also collectseaweed which they sell to middlemen. Their fishing and seaweed gathering activities, however, are limited by variations in weather throughout the year.

During the heavy Weeding season, community members assist each other by weeding farms for wage or a share of the crop, Despite scarce resources, the Pabalays have purchased a cow which Tirso uses to plow the neighbor's fields for cash or payment in kind. All resources are carefully managed to help with food and education expenditures (Shields and Thomas-Slayter, 1993).

Figure 4. Seasonal Calendar for the Pabalays on Siquijor Island, Philippines



VIII Activities, Resource, and Benefits Analyses*

Definition

An in-depth analysis of the activities, resources, and benefits of a handful of households representative of the various socio-economic categories established through wealth ranking.

Purpose

To obtain detailed information about livelihood strategies and resource management activities of households representative of the key socio-economic clusters within the community.

Materials

Poster board and magic markers for making diagrammatic and pictorial representations of the household and community, and a notebook to record additional information.

Approach

Arrange three visits with two or three households representing each of the socio-economic categories established. Each visit lasts about an hour and should involve as many family members as are available to participate. Discussion about activities, resources, and benefits among the family members can be useful for the participants as well as for the researcher.

For the Activities Analysis a seasonal activities calendar is drawn for each family (see pages 22 and 23).

The Resource Analysis is generated in a second discussion and builds on information collected through the seasonal activities calendar exercise. Researchers provide a sketch map of the community on large paper or poster board. The researcher and family members draw in the household and the physical resources upon which it depends. Natural, as well a economic resources, are included. Less tangible social resources and networks are then drawn as an overlay, usually represented with a different color set of arrows. The house is used as the reference point. Arrows are drawn to show the flow of these resources to and from the household. Questions include: Who has access to the particular resource? What are the terms of access? Who owns it? What are the family's formal and informal credit sources? Where are products sold? What inputs are used? What are their sources? Answers to these questions are drawn on the map where possible.

*Methods for activities, resource, and benefits analyses were first introduced by Overholt et aL (1985) and have been adapted for use by the ECOGEN project.

IX Improving Project Management: Integrating Gender

Communities in Action on Resource Issues

The definition of development, in its broadest sense, involves empowerment and capacity-building. It is a process of enabling disadvantaged people to manage the changes they seek in their own lives. These attributes occur on an individual level and also within the community as solidarity and empowerment emerge.

Ultimately, the capacities of local groups are central to improving community welfare and livelihood systems. Rural households are affected by conditions beyond the borders of their farms. Access to water, fuelwood, grazing lands, and forest resources for materials or small scale enterprises are among their concerns in managing community resources. Community institutions must be able to respond to challenges within these ecosystems. Their effectiveness is linked to the roles of both women and men within the community. Project managers need to ensure that the perspectives, interests, knowledge, and needs of both men and women are incorporated into community management efforts.

Gender-Sensitive Monitoring and Evaluation

Incorporating gender in project monitoring and evaluation requires both quantitative and qualitative techniques. Tools, such as the confirmation survey can be useful for providing numerical data regarding gender-based responsibilities and access to resources for purposes of project monitoring and evaluation. Resource and benefits analyses carried out among project participants can yield in-depth information for project redesign.

Gender-based involvement in group activities can be discerned through focus group discussions, participant observation, or more formal techniques. Obtaining information about gender roles, rights and responsibilities is only the beginning of gender- sensitive analysis and evaluation. Whether using informal approaches, such as participant observation and focus group discussions, or more formal interview schedules and questionnaires, the next step is to take this information and incorporate the ideas, perspectives, and concerns of both women and men into project implementation.

Using Scales to Build a Gender-Sensitive Ouestionnaire

One monitoring device is to employ questions using scales to determine variation in responses. For example, a project manager might want to review the activities of the Philippine irrigation group noted above asking about women's involvement in the management of the group. A donor agency, inquiring about the benefits from bench terracing and tree planting received by the women's group in Kenya might ask a question showing the degree to which participants received benefits.

In both cases, the project manager or evaluator can obtain key information relative to the functioning of the project. This in itself is not adequate. Further qualitative and investigative analyses are necessary to find out why a project is functioning in a particular way. Why are women involved in the irrigators' group the way they are? Why are some women benefitting from the Kenyan project while others are not?

X Gender-Sensitive Monitoring of Project Progress (The GMPP)¹

Definition

A chart which records the changes that occur during project life as registered by progress from the baseline data towards project goals using gender-based criteria.

Purpose

To engage community members in collective discussions of progress toward goals for the project which have been established by the community. The baseline data include information related to gender-based responsibilities, access, and control of resources relevant to the project.

Materials

A large poster board, markers, and a central location to display the chart.

Approach

In a series of meetings with key informants, focus groups, and community groups, preliminary findings are discussed and community members provide feedback to correct misperceptions and errors. Next, the identification of major problems, their prioritization, ways in which to meet goals, and schedule are discussed. In creating the chart, special consideration is given to seasonal calendars and identifying community groups that can carry out the tasks. Periodic meetings monitor progress.

Value

Creates a gender sensitive development strategy that is designed to take into account the local situation and improve men's and women's livelihoods.

¹ Adapted from: Philippine Development NGOs for International Concerns, 1992.

Figure 8. Gender-Sensitive Monitoring and Progress (GMPP) and its Potential Application in Zambrana-Chacuey, Dominican Republic

	· <u>.</u>						
Baseline Data	6 12 1			24	Targets		
11% of the women are members of the wood producers association			1		Double the # of women associates every year for 2 years in order to achieve nearly 50% female involvement		
Tree species mostly se- lected by project design- ers					Tree species identi- fied by men and women in the commu- nity are incorporated into agroforestry project designs		
One woman promoter of the wood producers group out of the federa- tion (consisting of 25 communities) (1 woman)					One woman promot- er/representative to the wood producers group from each of the 25 women's groups (25 women)		

New Initiatives

Two methods described below launch a process of sensitizing community members to issues of gender. In Kenya, facilitators are adapting these two approaches for engaging both men and women in analyzing project impact on gender roles at the community level.

The GAAP

The Gender Analysis Activity Profile (GAAP) is being tested in Western Kenya in focus group discussions with both women and men. By discussing community activities and the underlying reasons for them, participants clarify the factors which determine the gender-based division of labor and gender-related control over resources. Discussing these issues in a public forum raises community-wide awareness of gender-based inequities in resource access and control. With this knowledge community action to address these inequities is possible.

The GAM

The Gender Analysis Matrix (GAM) has been developed by Rani Parker (1990) to facilitate community discussion about project impacts for women, men, household and community in regard to labor, time,

resources, and culture. The GAM can be used both to test and to generate awareness of the impact of specific projects on gender roles and responsibilities. The matrix has been proposed for use sequentially at several points during project implementation. It enables members of a community to think through the implications of project development for both men and women.

Figure 9. Gender Analysis Activity Profile (GAAP) for Community Discussion

GENDER ANALYSIS ACTIVITY PROFILE

Who	Does	lt?
-----	------	-----

Why? (Determinants)

ACTIVITY	FC	MC	FA	МА	FE	ME	LEG	REL	CUL	ED	ECO	POL
School Maintenance												
School Fundraising												
Church Activities												
Public Works												
Baraza (Public Meetings)												
Harambee (Community Fundraisers)												

FC Female Child Legal MC Ξ Male Child Religion = Female Adult CUL Culture Male Adult MΑ = Education = Female Elder Economics ME Male Elder **Politics**

Figure 10. Gender Analysis Matrix (GAM)

Potential Impact of Small-Scale Dam Rehabilitation Project, Mbusyani, Machakos District, Kenya

Construction Phase

	Labor	Time	Resources*	Attitudes
Women	gather stone for ballast plant trees construct terraces	10-15 days labor at dam site (one woman per house- hold)	tools shovels hoes baskets	appreciate the benefits of water supply/willing to work in groups
Men	scooping dig fence hole/posts string wire	5 days labor at dam site (one man per household if available)	shovels	individual effort recognize value to home and livestock
Household	unskilled female/male labor per household	approximately 20 days	contribute poles, financial contri- bution Ksh50 per household	small-scale financial contribution acceptable not amenable to larger financial responsibility
Community	hold fundraising school children maintain seedlings	2 weeks planning 1 day event three times weekly through year as necessary	hoes buckets carry water	school master, teachers' cooperative, children will learn from project

^{*}Project donor to provide funds to purchase goods such as wire and nails.