

WOMEN AND DEVELOPMENT

GUIDELINES FOR PROGRAMME AND PROJECT PLANNING



UNITED NATIONS

ECONOMIC COMMISSION FOR LATIN AMERICA
AND THE CARIBBEAN

WOMEN AND DEVELOPMENT
GUIDELINES FOR PROGRAMME
AND PROJECT PLANNING



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Foreword

These Guidelines were prepared for use at the *Caribbean Regional Training Workshop in Programme/Project Planning Skills*. (Barbados, June 14 to 26 1981.) The initial idea for a Regional Workshop on this subject came from Caribbean women attending such other meetings as the "Seminar on the Caribbean Women and Their Participation in Economic, Political and Social Development" (Cuba, 1979) and at the "Regional Workshop on Income-Generating Activities for Women in Crafts and Agro-Industries" (Barbados, 1978).

The Workshop on Planning Skills brought together representatives from national governmental machineries, private organizations, as well as technical resource people from the English-speaking Caribbean. Representatives from international and regional governmental agencies, private foundations, national funding agencies, and financial institutions participated in the Workshop and provided counsel in the preparation of project proposals. Knowledge, information and resources were shared for more energetic and novel approaches to programme/project planning to help improve the status of women in the development process.

Theoretical and practical questions of planning were discussed. Out of the Workshop came not only draft project proposals and individual and country plans for extending the workshop experience at the national levels, but many additions to the contents of these Guidelines. It is hoped that they will assist women at all levels in their efforts toward accelerating the process of women's full participation in development planning and implementation.

The Workshop and Guidelines were made possible through the sponsorship of the Economic Commission for Latin America (ECLA) and its Caribbean Coordinator for the Integration of Women in Development Programme. Special appreciation is expressed to the Voluntary Fund for the United Nations Decade for Women (VFDW) for providing the funds for the Workshop and all related materials.

The successful outcome of the Workshop was due in large measure to the dedicated and competent management of the staff of the Women and Development

Unit (WAND), Extra-Mural Department of the University of West Indies, and to the technical resource people who worked with them on this project.

Gratitude is acknowledged to the United Nations Asian and Pacific Center for Women and Development (APCWD), the United Nations African Training and Research Center for Women (ATRCW) and the International Women's Tribune Center (IWTC) for the insights gained from their materials and made use of in these GUIDELINES.

Introduction

“If the strategies devised for the Eighties are to come to fruition, they must involve the participation of women at all levels. In a sub-region there is still a need for women to be seriously involved at the decision-making levels in government and planning. Women still form the highest group of the unemployed and underemployed in all territories. . . much is mouthed about the need to integrate women into the development processes of the countries. In the Caribbean, though women have always been involved in the development of societies, their involvement and contributions have often gone unrecognized, unrewarded and underutilized. I challenge you, this group of experts, in your planning sessions to devise strategies which, if they touch on energy, health, or the International Monetary Fund, leave no leeway for women, to be ousted from your formulae. They must be strategies which will ensure that Caribbean women do not remain at a disadvantage, otherwise, the whole region will be at a disadvantage.”¹

Hon. H. de B. Forde
Minister of External Affairs, Barbados

Women at all levels of responsibility have always been involved in activities for the improvement of the quality of life of their families and communities. Women have not, however, been integrally involved in the national development processes of most countries.

There is increasing recognition that “any measures for women isolated from the major priorities, strategies and sectors of development cannot result in any substantial progress towards the goals of the Decade”² i.e, Equality, Development and Peace, with particular emphasis on employment, health and education.

¹CEPAL, *Strategy for the Caribbean Countries during the Third Development Decade*, E/CEPAL/G.1132, Sept. 1980, p. 21.

²“Report of the World Conference of the United Nations Decade for Women: Equality, Development and Peace”, Copenhagen, 14-30 July 1980, p. 11, para. 30.

At the same time, it should be stressed, that "because of women's long historical disadvantaged position in society, there is need for *specific transitional* strategies, policies, measures and actions, if they are to actively participate in the execution of the objectives set forth by the countries of the region. . . The specificity of women's situation and the need for special programmes *by* and *for* them should not isolate them from the national process of social/economic and political development. . . It is not only urgent for them to acquire the skills and tools for designing and implementing women's programmes/projects; it is also a necessary condition for their further development, to know how those programmes/projects must become a part of the national development plan of each country."³

The purpose of these GUIDELINES is to assist women in planning programmes and projects that advance the status of women and at the same time, provide the links necessary to ensure their participation in the development process at the community, national, regional and international levels.

An essential part of this strategy is to involve rural and urban women, particularly from low-income areas, in the decision-making process which affects their opportunities and the quality of their lives.

Professional women with organizational responsibilities have valuable information which must be shared with community women. At the same time planning and decision-making must include the much-needed practical information which community women have to contribute. The institutional framework should be created or improved to permit this kind of participation on a broad basis. In the process, appropriate links must be made between the community and national policy and programme levels.

These GUIDELINES were prepared with the following considerations in mind:

- There are new perspectives of development as not just a goal, but as a process conducted in varying ideological, socio-economic, political and cultural settings; and of development planning as not being confined to the traditional area of meeting economic goals but social goals as well. Jamaican economist George Beckford stated it well:

"Meaningful development for Third World countries must not only lead to increased real per capita income, but also requires more equitable patterns of income distribution and (that) countries have at least control over their resources and the environment in which they live. This is a basic precondition

³Vivian Mota, Coordinator, ECLA Women in Development Programme, Opening Address, Caribbean Regional Training Workshop in Project-Programme Planning Skills (Barbados, June 14-26, 1981).

for the achievement of full human dignity, which is of crucial and ultimate importance to all people.”⁴

- There are new perspectives of “women and development”. Both the “equality” and “integration” approaches to the existing processes and institutions have serious limitations and may even be counter-productive. “Women must themselves help to *transform* the existing structures if these are to reflect in any meaningful way their needs and concerns”⁵ and indeed, the needs and very future of the entire human family as well.
- “Women” along with the “poor” have been seen as “targets” requiring integration into the existing process in passive rather than active roles. Women must unlearn their habits of dependence and strive toward self-reliance.
- Positive action by governments and the private sector is necessary to assist this “unlearning” process.
- Women are, and always have been, major contributors to development. Their contributions, however, have not been acknowledged, quantitatively or qualitatively –economic statistics and analyses of labor and capital grossly neglect women’s work as producers and reproducers, and traditional discriminatory attitudes and practices by men toward women are not sufficiently explained in history, nor rectified in current reality. Where the needs of women are addressed, they have in fact, been misinterpreted.
- Women, especially the economically disadvantaged, have been denied access to business capital. Even where they have access, there is a lack of confidence, training and tools. New initiatives must be sought for women to participate fully in the economy through salaried-employment or self-employment.
- Industrialization and urbanization intended to cause economic growth has traditionally brought radical changes in the lives of women and their families, without their having had anything to say about it, and often they have not shared in the benefits to be derived.
- Equity demands imaginative approaches to development to promote freedom of choice of technologies and routes to development that take into account the contributions of women.

⁴G.L. Beckford, *Persistent Poverty: Underdevelopment in Plantation Economies of the Third World*, Oxford Press, 1972.

⁵“Developing Strategies for the Future: Feminist Perspectives”, Report of the International Feminist Workshop held at Stony Point, New York, April 20-25, 1980.

- Tactical approaches for working with existing organizations which embody this industrialization and urbanization must be developed even as women create other institutions and work goes on for social transformation and a change of existing institutions.
- To participate fully in the development process, it is imperative to know how and why specific choices are made in development planning and programming.
- Women must be afforded the possibility of knowing the options open to them, of exercising freedom of choice in selection of options, and of having access to the resources needed to carry them out. We reject the “information trickle-down”, i.e., the idea of special groups parceling out knowledge and deciding for us.
- Participation of women in development planning and programmes/projects, must come through a *process of awareness-assessment and action*, that transform exploitative relationships based on sex into voluntary relationships, allowing women to make choices about how they spend their time and energies and yet not alienate themselves from their families and communities.
- A vital element in successful planning is the degree to which cooperation can be nurtured between women and men, and among women and their organizations –locally, nationally, regionally and internationally.

The GUIDELINES were first prepared to answer the needs of women in the Caribbean area and they evolved with the input of these women. They were first used at the Caribbean Regional Workshop in Programme-Project Planning Skills and then revised for use by the participants in extending their learning experience to other women in their own countries. It is hoped that the ideas and materials included will also be of use to women in other regions of the world.

The GUIDELINES have been developed to assist you in constructing logically arranged and reasonably complete women’s programme/project plans and funding proposals which will help you improve the status of women and accelerate their participation in the development process.

The GUIDELINES were conceived as a reference, rather than a rigid formula for success. They are flexible and can, and should be, tailored to your own needs. They are based on the fundamental concepts of management planning as applied to “women and development” goals, recognizing that in order to achieve these goals women will need access to human, material and financial resources, and the skill to use them effectively.

If your plan requires additional information –a more detailed evaluation procedure, for example– include it. If you have difficulty understanding how to complete the plan, don't hesitate to seek further assistance.

A programme/project *plan and a funding proposal* are closely related. A good plan, updated periodically, is the foundation for preparing an effective funding proposal. If you follow the GUIDELINES (remembering to adapt them to suit your particular situation), you should know how much money you will need to make your plan work, what kind of funding to look for and who is most likely to offer it. By presenting a clearly thought-out, well documented funding plan, you will show that you know what you want to do, how to do it, and how the plan will sustain itself over time.

The GUIDELINES are intended as a reference for use by national planners and programme officers of:

- governmental development programmes
- governmental women's machineries
- non-governmental and voluntary organizations

They can be used:

- for programme planning
- for project identification and implementation
- for programme/project proposal writing
- for developing income-generating activities
- as a basic management tool
- as a training tool for planning and implementing a workshop on any of these subjects

The GUIDELINES are divided into two parts:

Part One: Programme Planning

Part Two: Project Planning

Each part includes sections on direction, strategies and implementation. Some or all of these will be useful to you depending upon your specific needs.

The first part is a discussion of how a national organization (governmental or voluntary) should organize to develop its programme plan: understanding its mandate; knowing the situation of women and the facts about the national development plan

of the country and region; selecting or generating projects that come under its mandate; locating sufficient funds to meet its objectives and providing technical assistance to the projects related to the overall program.

Part Two focuses on *community-based* projects that are related to the organization's overall programme objectives. (Reference is also made to, but not elaborated upon, *national* related projects that are often essential to meeting programme objectives, i.e., projects to influence policy, legislation, mass media.) The second part speaks about the sensitive role of a national programme development officer as the bridge between the women in the community and the broader context of development activities. It outlines steps that can be taken, depending upon organization and local realities, to involve women in project identification, base-line data gathering and analysis, project design, proposal writing and project implementation and evaluation.

Underscored in the GUIDELINES as essential elements for women to become involved in the development process as free and equal partners are three interrelated steps:

- a) *awareness* of the facts of a 'situation';
- b) *assessment* of their causes and desired changes;
- c) *action* (individual and group) to close the gap between the two.

The following *definition* of terms as used in the GUIDELINES may prove helpful:

Programme: a sequence of operations or projects within a broad scheme for meeting an overall development objective.

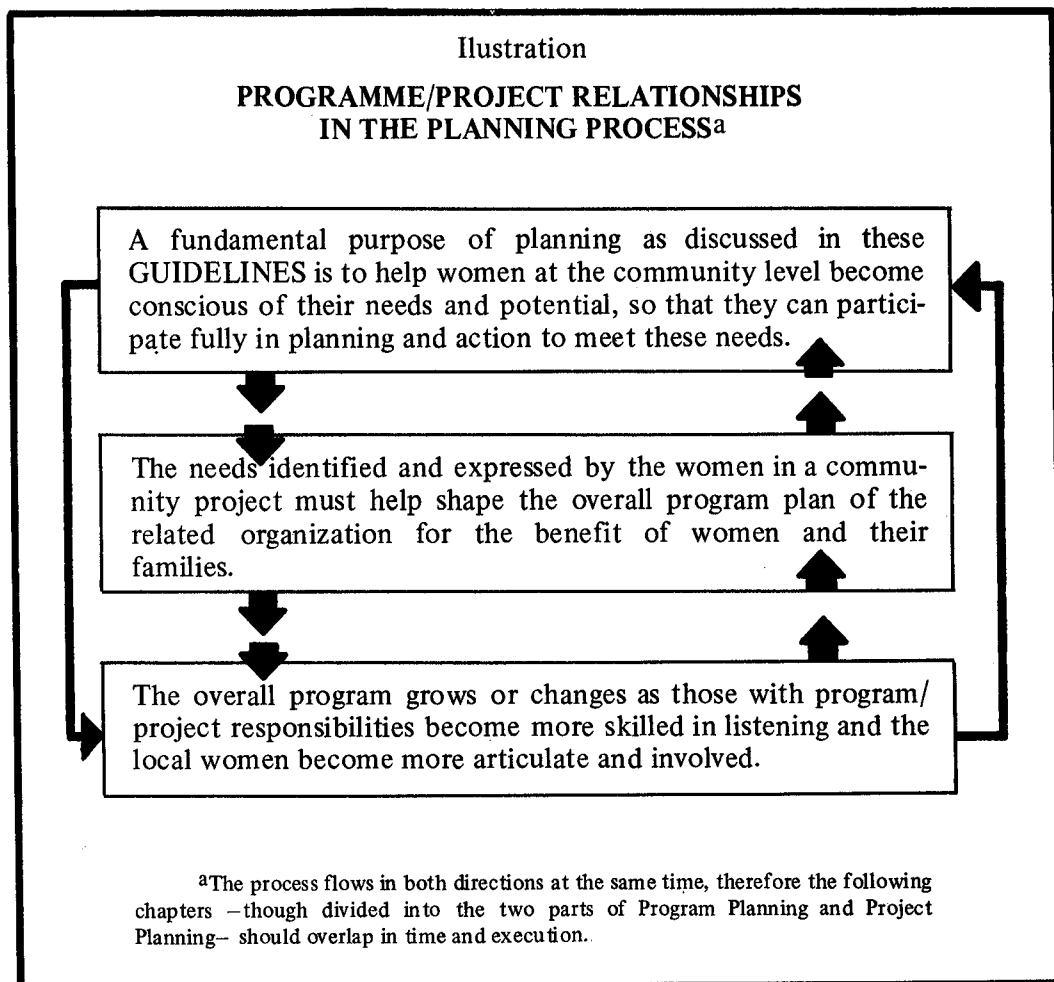
Project: a design or undertaking to accomplish specific objectives in response to an identified problem.

Plan: a method (orderly arrangement of parts) devised for making or doing something or achieving an end: plan always implies mental formulation and most times written or graphic representation.

Costs: the amount or equivalent to be paid for those things required to achieve an objective.

Budget: the plan for coordination of resources and expenditures; the amount of money that is available for, required for, or assigned to a particular purpose.

*Proposal:*⁶ an act of putting forward or stating something for consideration and requiring some action with reference to it.



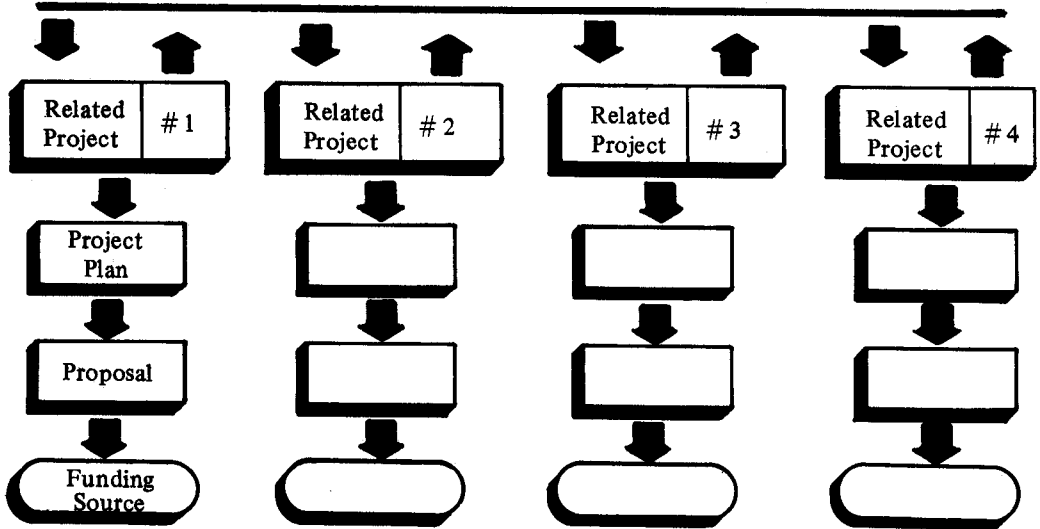
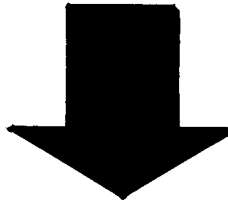
We suggest reading the GUIDELINES through from start to finish to help you decide how they can best be used to help you with your own programme/project planning or with the preparation and implementation of workshops on programme/project planning to assist a wider group of women.

User's Evaluation Sheet immediately follows. Please read it over and keep it in mind as you go through the GUIDELINES. We need your suggestions and criticism.

⁶It may not always be necessary to prepare a proposal for your programme/project. It is, however, best to have a plan, to determine resources needed and to prepare a budget before undertaking any programme or project. Your plan serves as the basis for any proposal you make to a funding source.

Illustration

ABC NATIONAL WOMEN'S ASSOCIATION



**SAMPLE FORMAT FOR THE EVALUATION OF THESE GUIDELINES BY
WOMEN INVOLVED IN PROGRAMME/PROJECT PLANNING**

It would be appreciated if you could take the time to complete the following form and send it to:
 CEPAL Coordinator
 Integration of Women in Development Programme
 P.O. Box 179-D – Santiago, Chile

Name _____ Title _____

Organization _____

Address _____ Country _____

1. Have you used these guidelines in your work? Yes _____ No _____

2. How were they used? (Describe) _____

3. Please indicate the usefulness and frequency of use of each section of the guidelines:

	<i>Usefulness</i> 1 to 10 (1 = lowest)	<i>Frequency of use</i>
Part One Programmes Planning		
Programmes Direction	_____	_____
Programmes Strategies	_____	_____
Programmes Implementation	_____	_____
Part Two Project Planning		
Project Direction	_____	_____
Project Strategies	_____	_____
Project Implementation	_____	_____

4. Which sections did you have particular difficulty with? Please be specific:

5. Which sections would you like to see elaborated upon? Why or why not?

7. What specific changes would you find helpful in a revised version of the guidelines?

8. Would you enclose or refer us to other materials you think would be useful in a revised edition? _____

• Please send us names and addresses of persons/organizations interested in receiving materials on women in development.

Part One

Programme Planning

Introduction

- Women are half the world's people.
- Perform two-thirds of the world's working hours.
- Receive one-tenth of the world's income.
- Own only one-hundredth of the world's property.

Among the hopeful signs that women are beginning to be included in the planning process and to affect a change in the inequities of their situation are the adoption of the World Plan of Action for the United Nations Decade for Women –Equality, Development and Peace, 1976-1985– in Mexico City in 1975 and the Programme of Action for the Second Half of the Decade for Women in Copenhagen, 1980.

Regional plans⁷ of governmental and non-governmental organizations are also beginning to reflect the concerns of women, and more and more governments are in fact expressing their willingness to integrate women in national life by establishing national machineries for the advancement of women.

Yet, despite “the considerable efforts made by the majority of countries in the furtherance of the goals of the Decade for Women, progress has been insufficient to bring about the desired quantitative and qualitative improvements in the status of women.”⁸

In a 1981 report for the United Nations, Ms. Peggy Antrobus defines the problem as. . . “little ‘official’ recognition of the extent to which the differentiated roles of men and women lead to differentiated impact of the process of develop-

⁷See “Regional Plan of Action for the Integration of Women into Latin America Economic and Social Development”, E/CEPAL/1042/Rev.1, November, 1977; *Strategy for the Caribbean Countries during the Third Development Decade*, E/CEPAL/G.1132. See also: “Plan of Action for Women in the Caribbean”, prepared by the Seminar on the Integration of Women in the Caribbean sponsored by the Extra-Mural Department of the University of the West Indies and the Jamaica Women's Bureau (Mona, Jamaica, 6-10 June 1977).

⁸“Report of the World Conference of the United Nations Decade for Women: Equality, Development and Peace”, Copenhagen, 14-30 July, 1980.

ment, and the need for a special focus on women if their situation is not to be jeopardized by certain types of development. The general conclusion emerging from the literature is that most development programmes reach more males than females, may not reach women at all, and may operate to the detriment of women. This underlines the complexity of the issue and calls for cooperation among third world women themselves to produce the kind of analysis which can help define the concept of women and development to cut across the boundaries of class, race and political ideologies and to reflect the essence and reality of women's experience everywhere."⁹

Planning is a fundamental requirement to ensure that the concerns of women –not only for their own status and well-being, but also for the well-being of their families and communities– are not neglected, but are in fact consciously included in ways thought out by women themselves.

Planning is the foundation upon which other functions of effective management, i.e., organizing, coordinating and appraising, are built. It implies a systematic approach to coping with a dynamic and challenging environment.

Planning recognizes the need to investigate, gather, review and evaluate relevant factors of information; decide on priorities and strategies for action to implement decisions; and appraise (monitor/evaluate) the outcomes. The planning process is essential no matter what the problem area.

Planning machinery has assumed an influential role in many countries. Developing countries have adopted development planning as a strategy for making the best use of scarce resources. National and multinational corporate planning is another powerful element in the shaping of the development process.

Part One of the GUIDELINES discusses the program planning process and shows how this planning can have positive results for women by linking their concerns and community projects into larger development efforts, i.e.:

- international, regional and national development plans and policies
- regional, national and local government programmes
- employer organization policies and practices.

The goal is to demonstrate how broad programme plans can be shaped by and for community women, many of whom have been deprived of the information, of the financial and material resources that ironically are available to others because of their work and their efforts. In the process we hope to build the self-reliance

⁹“Promoting and accelerating women's participation in development programmes in the Caribbean through technical co-operation among developing countries”, TCDC/2/13, 3 March 1981.

necessary for women to contribute more fully to solving their own problems and the problems facing their countries.

It is also hoped to sensitize, and in time; to transform the structure itself so that the changing expectations of women will be considered seriously and *institutionalized* at the decision-making levels of governmental and non-governmental organizations. This requires going beyond rhetoric, “special programmes” and token financial allotments to the far more critical questions of change in perception and attitude to women as “partners in development”.

“In all countries, women are increasingly impatient to widen the option for realizing their potential and to participate on an equal basis with men in the productive and creative achievements, as well as in the reward systems, of their society. . . their recent demands –and the beginnings of their action efforts at the family, community, national and world levels– show a common commitment to obtaining results *within their own lifetimes.*”¹⁰

¹⁰Margaret Mead, in the foreword to *Women and World Development*, Irene Tinker and Michele Bo Bramsen, eds., Overseas Development Council, 1976.

Chapter I

*Programme Direction :
What do we want ?
Why do we want it ?*

A. Initiating the Planning Process

Since Women and Development Programmes are originated, sponsored, or regulated by either governmental agencies or non-governmental organizations¹¹ –it is important to understand these institutions.

The success of a programme will depend not only on the quality of its content but also on how well it fits the purpose of an organization or the abilities of its staff and how effectively it brings women into the center of its concerns and priorities. Success will also depend on understanding practical ways of getting things done and pin-pointing centers of power, influence, and decision-making.

Decisions on programme objectives and strategies should be based on thorough knowledge of the sponsoring organization. For example, a Women and Development Programme initiated in a governmental ministry of health will be different in scope and function from that of a non-governmental agricultural organization. The over-ambitious programme can be avoided by a realistic look at how it will be carried out. Also, reviewing what is being done by others in the field will help avoid duplication

¹¹The term “organization” is used to describe the programme/project sponsor, whether it is a governmental ministry/agency or a voluntary/non-governmental organization.

of programmes. Discouragement in the face of enormous problems can be met by realizing how a small organizational success fits into a larger picture; e.g., a successful village workshop in bee-keeping can be a first step toward upgrading the economic viability of women.

Therefore, to initiate the planning process you must:

1. Identify the scope and goals of your organization;
2. Analyze the internal situation
3. Review specific objectives of your organization; and
4. Organize for planning.

1. Identify the scope and goals of your organization

- Have the goals been defined? By whom?
- Are they understood throughout the organization?
- Where is your organization now, and where does it want to be in five or ten years?
- Are the present organization plans and strategies suitable for reaching these goals?
- What other programmes are functioning in the organization? How were they prepared? Who was involved in the planning?
- What are the links of the organization with national/regional development?
- If the scope and goals are vague, how can they be clarified?

2. Analyze the internal situation

- Who are the recipients of the services of your organization? Where are they? What are their problems, needs, and wants?
- What benefits does your organization provide or intend to provide that are not available elsewhere?
- What other organizations are working on similar questions? Is cooperation encouraged?
- How can the organization improve its performance in providing resources to the broader community? To women in particular?

B. Observing the Situations of Women and of Development Activities

Regardless of the nature or size of the programme you are preparing, it is necessary to observe:

- The general situation of women in your country.
- The national/regional plans for development.

It is important for everyone involved in your programme to have specific information on the situation of women in your country, particularly concerning employment, health and education. This knowledge is essential if you are to sensitize policy makers and women themselves to the gaps between the attainments of men and women, between rural and urban women and between all women in underprivileged population groups, and other women in all sectors.

It is equally important to know the specifics of the development plans of the country and the region. Planning your programme in the context of the larger picture so that women define their priorities and strategies, rather than have them selected by men and implemented by and for them, as they now are. It is a necessary condition for maximum effectiveness, to know how your programme and its related projects can be linked at the national and regional levels of planning from the point of view of technical and financial resources.

To observe the situation of women and development you must:

1. Prepare for pre-programme planning research;
2. Make use of secondary research;
3. Conduct primary research; and
4. Analyze your findings and assess the implications for programme planning.

1. Prepare for pre-programme planning research

It is essential for planning programmes (and income-generating projects) to observe the actual situation, to recognize the needs of the people to be reached by your service or product, to investigate what else is being done in the field, and to determine whether and how it can be done more effectively through your service.

This review or pre-programme planning research is similar to conducting marketing research to establish a successful income-producing venture.

Although marketing research is not covered directly in the GUIDELINES, it is a function that must be performed in connexion with projects that will be initiated to help women participate in the economy of their countries.

To begin pre-programme planning research, you must:

- Decide on the scope of the research.
- Assign responsibility for the research.
- Determine what information is already available or knowledge has been acquired by those involved in planning your programme.
- Decide on method of research to be used.

The extent of pre-programme research will vary depending on the nature and resources of the programme. The research discussed below refers to:

- secondary research: general information on the overall subject that is already available through other sources.
- primary research: specific information required prior to planning a particular activity in an identified area.

Pre-programme planning research should be a widely participatory activity. It is in itself an education process and will provide a better understanding of the subject area for everyone involved in the programme. This activity is not meant to produce a formal research study report. It should provide the basis for:

- (1) overview of the situation of women and development plans in your country
- (2) determination of programme priorities in the context of national and regional development plans
- (3) decision on strategies for selection of related projects
- (4) definition of programme/project objectives and indicators of success
- (5) monitoring extent to which women participate and benefit from both general and sectoral development plans and programmes.

A major problem you will encounter in this research activity, will be gaps in information on women. Data collecting agencies, for example, have not in most cases, provided breakdowns by sex and age, nor is “unpaid” family labour counted in the work force in an economically viable way. An outcome of the exercise should be identification of these gaps and recommendation to policy-makers for revising current statistical practices to ensure that all data are disaggregated and that the concepts and analytical tools of research are free from sex-based stereotypes.

2. *Make use of secondary research*

Data gathered by other organizations are available for your use. For example one of the functions of national machineries is to serve as a focal point for information on women. No programme or project should be undertaken without a review of these sources.

Make a list of questions you want to have answered to help you to understand better the situation of women and development in your country and region. (See pages 26-30 for examples.) Then investigate some of the sources for your answers.

EXAMPLES OF INFORMATION CATEGORIES	
Women	Development
<ul style="list-style-type: none">– demographic information, ex. statistics on population size, density, distribution; vital statistics, i.e., labour force, housing, health– studies and trend reports (area of employment, health, education, savings/loans, small business enterprises, other)– other programmes/projects or components of programmes/projects concerned with women and issues affecting women– advocacy groups, women's organizations	<ul style="list-style-type: none">– development plans of national government and regional and international bodies– development plans of government departments, i.e., health, commerce– governmental and non-governmental surveys, research studies and reports– private sector reports on economic activity and forecasts, i.e., new investments, manufacturing industries. . .

Analysis of this secondary research data should help decide what are programme priorities, where energy and resources will be placed, in what order the problems will be attacked, and with whom to work to accomplish the goals. (See section 4 below.)

3. *Conduct primary research*

Programme-related projects should be based upon primary research. For example, a programme to increase food production might identify a village as a priority

EXAMPLE OF INFORMATION SOURCES

(For the Caribbean)¹²

Governmental organizations

- Census data
- The national development plans
- National agencies
- Planning, Labor, Commerce, Health, Agriculture and Education Ministries
- National Machineries
- The Economic Commission for Latin America (ECLA)
- The Secretariat of the Caribbean Community (CARICOM)
- The Inter-American Commission on the Status of Women (CIM)
- United Nations agencies (UNDP, UNESCO, UNICEF, UNFPA, ILO. . .)
- Regional and International Agencies

Non-governmental organizations

- Caribbean Women's Association (CARIWA)
- Caribbean Church Women (CCW)
- Caribbean Conference of Churches (CCC) and two of its Commission: Commission on Development (CADEC) and the Commission on Renewal (ARC)
- University of West Indies: Women and Development Unit of the Extra-Mural Department (WAND) and the Research Programme on the Role of Women in the Caribbean, Institute of Social and Economic Research (ISER)

for project activity. The specific project activity should not be decided upon until contact is made with the women of the village. (See Part Two.) Much of the research can be done by the women themselves with assistance from the organization's programme staff. Primary research in its simplest form will produce a community profile upon which the project design can be based. It is action-oriented or pre-project design research.

Not all projects take place at the local level. A broad review of the situation of women and development will point out other areas where action is needed to effect change.

¹²For detailed listings of national and regional organizations where reference material can be obtained, see the Asian, African and Caribbean *Women's Resource Books*, produced by the International Women's Tribune Center (305 East 46th Street, New York, N.Y. 10017).

The programmes referred to above –to increase food production– in addition to including a community-based project, might have a related national project such as the “right of women to own land”.

A few other examples of national level initiatives taken by women in various regions are:

- Projects to improve the legal status of women
- Projects to improve data collecting methods relating to women and development
- Projects to open up new small business and employment opportunities for women.

The national level projects require the same primary research methods as discussed above. For example, before deciding on specific products or services for the development of small businesses, it is necessary to find out what is already on the market, what marketing feasibility studies have already been made, and the interest and availability of women owners/workers.

Primary research can take the form of surveys, observations and demonstrations or some combination of the three.

A survey can be a versatile, flexible and relatively inexpensive tool for gathering information. It can be conducted by personal interview or questionnaire. (An important and comparatively low-cost resource for carrying out surveys, is the local university student. Their participation is also a way of sensitizing new generations of professionals to the problems of women and the development process.) The choice depends on available time and money, the kind of project and the degree of accuracy required. External professional assistance should be sought if the programme staff has not had experience with these methods.

4. *Analyze your findings and assess the implications for programme planning*

This is the most crucial and difficult step in the planning process. Since analysis of *primary* data at the community level is discussed in Part Two, and the analysis for national projects will vary widely according to the nature of the activity, this section will focus on considerations for analyzing *secondary* research information.

Areas of concern and related questions for use in the analysis of secondary research at the start of a programme and periodically for measuring progress made in these areas, are:

a) *Economic and social aspects*

- Are unemployment, poverty, poor living conditions, malnutrition and illiteracy affecting the majority of the population and impinging more heavily on women –in particular women heads of families– than on men?
- Does agricultural policy protect producers (small farmers, self-subsistence village economy and land tenure) and means of production? What is the risk of cash crop production leading to loss of land-introduction of money economy to transformation of farmers to labourers (low-wage) dependent on capital for existence?
- Is the country primarily agricultural? Does it produce sufficient nutritious food to meet local needs?
- Is the economy of the country continuing to grow and diversify?
- What new or expanded industries and related technologies are being introduced? i.e., tourism?, manufacturing? mining? How have they affected women? the environment?
- Do these new industries incorporate some of the colonial/plantation society features that have characterized many third-world countries in the past?
- Do dependencies on foreign imports and investments persist in vital areas of the economy?
- Do internal and external migration have important consequences for the country? The region? What are they?
- Have jobs for women increased/decreased? Do the jobs created advance the status of women or will they result in further inequities, i.e., low status positions; differentials in wages; new stereotypes?
- Are women given the opportunity of training to take advantage of the new jobs? Do employers take account of women's multiple roles by providing such services as day-care, flexible work hours, maternity leave?
- Are women conscious of the roles traditionally assigned to them or to sex discrimination on the job or in their job opportunities?
- Have women entered the economy as independent entrepreneurs in the formal sector? the informal sector, i.e., street vendors? with what impediments? with what results?
- Are there any health-care services for women other than maternal and child-care? early detection of cancer, for example? services for women who are not mothers? do these services reach women? are they organized in such a way as to facilitate access and freedom of choice?

- Do women have access to education programmes, not only formal schooling but also adult education and skill training? do the programmes discriminate against women in curricula content, types of skills? are women using the opportunities provided?
- Is there universal adult suffrage?
- Are there trade unions, political groups? have they affected a change in basic economic and social relationships?
- What legislative and/or other measures have or should be adopted and implemented which guarantee women protection against any sexually-biased practice, especially in the areas of employment, health and education?
- Have there been successful programmes that have dealt with any of these problems? have they improved the quality of life of women and their communities? what can be learned from them?
- Are women aware of these situations and their causes?
- What priorities and programs do you want to see incorporated in the national and regional plan concerning women's involvement in the planning process? in women's issues in socio-economic programmes and plans? in capital investments and industrial development?

b) *Planning*

- Is there a development planning process in your country? what are the mechanisms? how are they used? how are women involved in the planning process?
- Is there a long-range development plan? is it limited to public sector expenditures or to receiving and administering foreign funds?
- Do data deficiencies –particularly on women– and lack of trained personnel, inhibit planning?
- How do policy makers view modernization, industrialization, regional cooperation, foreign aid and investment? how do the policies relate to equitable patterns of income distribution and the achievement of full human dignity? self-sufficiency for the nation? the economic and social well-being of women and their communities?
- Is project preparation the total planning activity? what projects are planned? do they encompass the concerns of women and their families? what are the sources of funds for projects? are there specific allocations for women's components in national or community projects? for women specific projects?

- Is it generally acknowledged that women make a major contribution to the social, political, economic and cultural development of society? in practice, is their access to decision-making positions, to information, resources and services severely limited?
- Are women planners increasing their efforts to know about and intervene in the direction development planning takes? are women planners in a better position to cooperate with each other and to pool resources for more effective programmes and projects?

c) ***Women and development activities***

- Is there a new consciousness of women's role, different from the past?
- Generally, is there evidence of commitment at national and regional levels to promote women's participation in development programmes? is the concern for women viewed as: a social welfare, expedient utilization of human resources, or social justice issue?
- Have national machineries, i.e., advisory committees on the status of women; Women's Desks and Women's Bureaus been formed? are they to be found at the highest levels of government? are there offices and posts at different levels to deal with local situations?
- Has the number of women in senior and decision-making positions increased in the last decade? among these women is there concern for women's issues? Are there new patterns of cooperation in the development process that have been missing in the past?
- Have special efforts been made by regional organizations to establish sections to address women's issues?
- Have women's voluntary organizations instituted programmes and advocated new government policies to improve the status of women?
- What is the scope and goal of governmental and non-governmental organizations (NGOs) that deal with women? are there areas of mutual support and cooperation? can these be strengthened and expanded to maximize resources?
- To what extent and through what means do women's movements and other NGOs have the opportunity to affect government policies? in what instances might an NGO work more effectively for change than a women's group in the government? how can this potential be increased?
- What progress is being made toward involving such NGOs as trade unions, political groups, cooperatives, etc., in helping women organize to increase their power over their own lives in the society?

- In light of the questions discussed above, is there need for other types of advocacy groups and instruments for change to be organized?
- Are there common perspectives for organizing women based on women's work in the home, in agriculture and in industry? concern for the health, adequate nourishment and living standards of all individuals? protection of the environment? is the need for child care and education seen? is the right of women to control their own bodies, their sexuality, and their reproduction respected?

When the investigation is completed, organize the information in an Overview of the Situation of Women and Development activities in your country. Next, formulate a list of categories and specific problems you have identified in order of importance under each category, indicating needs, some possible solutions and potential collaborators.

Example

ABC NATIONAL WOMEN'S ASSOCIATION

<i>Categories and problems</i>	<i>Need/possible solutions</i>	<i>Potential collaborators</i>
National development plan <ul style="list-style-type: none"> - In process, but no women participating - No Women's Desk Unit/Bureau within the government - Planning Ministry negotiating new industrial investment to produce XYZ. Market women's business in jeopardy. 	<ul style="list-style-type: none"> Identify and recommend women planners Create public interest and contact officials to begin one. Action to alert market women; protect their position in informal market; suggest types of assistance for other women to share in industrial development plans. 	<ul style="list-style-type: none"> All other national women's organs. Planning ministry Planning ministry Development bank Planning ministry Market women Ministry of Agriculture, sub-national agricultural research and training section, others?
Agricultural production <ul style="list-style-type: none"> - Low levels of food production and of income to buy nutritious substitutes - No land tenure for women 	<ul style="list-style-type: none"> Find effective means of assisting women to increase food production, family income and preparation of nutritious food. 	

Try out the Overview and list of problems and possible solutions with women at all levels, to:

- pin-point some of the information gaps

- test validity of problems/solutions identified
- develop preliminary recommendations for priority areas of action

The recommendations should be discussed among all those participating in the programme planning. An additional section of the Overview should be prepared, describing the priorities selected, with a rationale for each.

There should then be a final study of the Overview by all involved, to determine programme strategies and related projects to be undertaken within the priority areas.

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Exercise

1. List the criteria used in determining women’s programme priorities, and the values upon which they were based.
2. Describe how these priorities relate to priorities of national and regional development plans.
3. Do the priorities you have selected fall within the mandate of your organization?
4. Are other organizations already active in the priority areas you selected? is there a way of cooperating with another organization? or, should you consider shifting your priority to one as important but totally unattended?
5. In light of the complexities and changing nature of society, how do you propose to monitor and update the situation analysis presented in your Overview?

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C. Establishing Programme Objectives

The planning process has been initiated. Your organization has been studied. The situation of Women and Development has been carefully observed. The problems have been identified, and specific priorities have been set. Ideas for programmes have emerged from your research and analyses. Now it is time to establish targets against which you can measure your performance. Remember the overall goal: FULL PARTICIPATION OF WOMEN IN THE DEVELOPMENT PROCESS AND IMPROVEMENT IN THE QUALITY OF THE LIVES OF ALL.

How within the scope of your particular institutional setting can this goal be accomplished? In the short term? In the long run?

To conduct effective programs to achieve this goal you must:

1. Establish criteria for programme objectives;
2. Set programme objectives in the light of these criteria; and
3. Assess programme performance.

Programme objectives should be:

Result-oriented, measurable, realistic and attainable, specific and clear, acceptable to those whose assistance will be required, flexible, consistent with one another.

1. Establish criteria for programme objectives

- Start with the problem you selected. What situation or improved conditions would enable you to say this problem had been solved or progress had been made?
- List various actions that might bring about this changed situation. How many possible actions are there? Can the best elements of various options be combined? Analyze the cost and benefits of each programme.
- Considering your resources and capabilities, what is the best choice of programme? Why?
- Do the people concerned agree on the programme selected? How can their commitment be demonstrated?

2. Set programme objectives in the light of these criteria

A programme is not an end in itself, but a means of achieving various objectives:

- One or more long-term objectives or ultimate aims (development objectives),
- One or more immediate objectives to be achieved within a given period of time.

Illustration

Let us say, from the example in the previous section, that the ABC National Women's Association, on the basis of inputs from women in the villages, selected an agricultural programme to respond to the problem of "low levels of food production and of income to buy nutritious substitutes".

The ABC women's organization selects its long-range development objective.



To organize and train women in a specific village in order to raise their standard of living, augment their family income, and increase their participation in community development.



- Increased food production
- Higher family income
- Improved family nutrition
- Increased participation in decision-making



Now the organization is ready to set its immediate goals. But it doesn't by itself decide upon an irrigation project or a cooperative bakery. *The important change from the "top-down" approach to programme and project planning is to talk again with the village women at this point.*¹³

The village women say they want to learn more efficient ways of farming in order to feed their children better.



What they say forms the basis of discussion and analysis of possible plans.



The immediate objectives are listed and defined periodically, rather than for the entire term of the programme.



The objectives decided upon for the first three years might include:

- To create a link with the agricultural research and training center in the region to train a specified number of village women agricultural workers in improved farming technologies.
- To augment the cultivated area, increase crop yields and family income, relative to development objective; to decrease malnutrition by a specific percentage.

¹³See Part Two for additional information.

3. Assess programme performance

In order to demonstrate that the programme and its related projects have contributed to the achievement of objectives, a set of agreed-upon targets must be built into the formulation of objectives. These targets should permit us to measure and judge the programme's effectiveness; e.g., in the example used above, the target percent of increase in family income during a specific period of time would be a yardstick to measure the success of the programme in reaching its goal. The same process of setting immediate objectives would be followed by other related projects on the national level. Part Two contains additional information on the planning and evaluation process.

Identification of outputs and inputs can also prove helpful in preparation of objectives. Outputs are the concrete and tangible "products" which result from the programme's inputs, i.e., reports, studies, documents, trained people, agricultural center, etc. Each objective may have a series of inputs (i.e., increasing the number of acres cultivated by X% might require a manual, x number of professionals trained, pesticides) necessary to produce each one of the programme's outputs.

Development agencies generally combine these components in a logical framework matrix that is used to describe in a clear, concise way, the links between objectives, outputs, inputs and assessment criteria for evaluating whether a programme has achieved the planned results.

Descriptive Worksheet

<i>Narrative summary</i>	<i>Objectively verifiable indicators</i>	<i>Means of verification</i>	<i>Important assumptions</i>
Development objective (broader goal to which programme contributes)	Measures of goal achievement	Type and location of information	For achieving goal targets
Immediate objectives (specific achievements desired)	Conditions that indicate purpose achieved at end of programme	Type and location of information	For achieving specific objectives
Outputs (specific intended kinds of results)	Magnitude of outputs	Type and location of records	For achieving outputs
Inputs (specific people, training, finances, materials, equipment)	Type and quantity	Type and location	For providing inputs

Note: Indicators are the pre-established programme success criteria, specific and explicit, pertinent and objectively verifiable.

Verification refers to the source of the data or evidence to be used to assess the degree of achievement i.e., public records, production statistics, survey.

Important assumptions are situations or conditions which must be assumed to exist if and when the project is to succeed, but over which the programme management team may have little or no control (fluctuating prices, droughts, etc).

Chapter II

Programme Strategies - How we do it

Chapter I discussed what we want to do and why we want to do it. Now we must carry out the programme.

Although many successful projects are begun outside of an institutional framework or programme design, we are concerned here with projects that relate to a broad programme plan. These projects could be conducted anywhere from the local through the international level, but the important consideration is focusing financial and material resources and time on a particular problem area in order to maximize the possibility of success. This requires thought about the best strategies to use, i.e., types of projects to solve the problem. It does not preclude responding to a crisis or changed situation outside the immediate problem area if the need presents itself.

A. Identifying projects that relate to a broad programme plan

To ensure selection and support of relevant projects you must:

1. Establish programme policies and procedures;
2. Plan strategies; and
3. Formulate potential projects.

2. Plan strategies

Planning strategies to solve a particular problem involves:

- selecting the most effective types of projects and activities in your priority area
- deciding on the sequence in which they will be performed
- determining how the projects will be carried out.

Continuing with the example of the ABC Women's Association agricultural programme, the following is illustrative of strategic approaches that might be taken:

- (a) Analyze the agricultural situation and rural development plans of the country in greater depth and discuss your programme with the representatives of the agricultural department concerning choice of rural community(ies) in which to work and possible linkages with ongoing rural programmes.
- (b) Analyze the base-line information prepared in the community selected for related project development (as described in Part Two) and prepare types of technical assistance indicated for project design and implementation.
- (c) After the rural community project starts, another project could be designed to send some of the community women to visit more experienced groups in other parts of the region.
- (d) A project to research and open up new national and regional markets for locally-produced food products, might be developed.
- (e) Another part of the strategy might be to set up a project in collaboration with the agricultural department to work on filling the gap in research data on the situation of rural women.
- (f) Still another project might be for legislative reform on land ownership for women.

The point is that, as far as possible, a long-range programme strategy should aim at tackling the problem comprehensively. Its projects should help to:

- bring some immediate benefits to women
- advance their skill to become more effectively involved in the planning processes
- link it to the on-going system
- effect change in the system itself.

Strategy for ensuring that the Needs and Concerns of Women are Taken into Account in National Planning.

Exercise I

- 1. List your programme and project ideas
2. Group them within the broader development goals of the country.

Exercise II

- 1. Take one of the development strategies for your country or region and list two or three programme and project ideas which would help to achieve these objectives.
2. Develop a list of three questions which should be asked to help ensure that women's needs, priorities and strengths are taken into account.

3. Formulate potential projects

There is a wide range of projects that women have developed and are continuing to initiate in all parts of the world that are steadily increasing confidence, capabilities, benefits to woman and instruments for change. Networks of women are helping to create this momentum and to spark innovative and enterprising initiatives. 14 Your programme and projects can benefit from as well as assist other women in finding out what works best and why.

Projects generally fall under one or more of the following categories:

- a) Basic services such as:
- Preventive health care
- Maternal and child health care
- Increased food production for local consumption
- Food processing, storing and marketing
- Adult education
b) Income-producing activities such as:
- Marketing research and planning
- Start-up or reinforcement of small businesses
- Savings and loans institutions
- Cooperatives and revolving loans funds
- Industry job creation and placement.

14 See Women's Networks, Newsletter No 13, 1980, International Women's Tribune Center, Inc., 305 East 46st New York, N.Y. 10017, USA.

c) Instruments for change such as:

- Start-up or reinforcement of organizations/institutions for greater access to policy-making and resources
- Advocacy groups
- National machinery on women's issues
- Seminar and workshops on planning
- Scholarships and fellowships.

Research studies are an important category of projects not specifically covered in these GUIDELINES. There are other resources you can look to for information on extant research studies and methods.¹⁵ It should be stressed, however, that pre-planning or action-oriented research *is* discussed in the guide, not as a separate project, but as an essential part of all programmes and projects. Training, too, is treated as an integral part of effective implementation of programme/project goals.

When formulating potential projects, special consideration should be given to the areas mentioned below.

Small business ventures. Women throughout the world have come to realize their need for financial self-sufficiency and for increased participation in the economies of their countries. Small business ventures and other income-producing activities are springing up everywhere. Some points to keep in mind when formulating projects for the start of small businesses are:

- Market research is necessary to determine the potential for the product or service.
- There must be access to capital, and you may have to pioneer the way.¹⁶
- Many women are taking the initiative in raising capital and maintaining control through cooperatives and revolving loan funds.¹⁷
- Not everyone has the capacity or inclination to be an entrepreneur; and even those who have the potential need training and a support system to help them with such things as loan applications, marketing, accounting, etc.

¹⁵See the UN International Research Training Institute for the Advancement of Women (INSTRAW), reference material.

¹⁶Women's World Banking (WWB) is a facilitating organization that operates through a capital fund to provide loan guarantees and to help generate management assistance to women in business, particularly those women who have not generally had access to banking and financial services. Local groups, working with WWB, link women with banking, financial and management skills, and the information needed to make a success of their enterprise.

¹⁷See "A Guide to Community Revolving Loan Funds", Voluntary Fund for the UN Decade for Women, 1981.

- National and regional women’s groups and organizations working together can play an important part in helping small-business women identify existing markets or create new markets and manage their enterprises, and create new vehicles for capital formation.
- Women have started businesses in food production and preservation, arts and crafts, soap, wine, dressmaking, poultry; credit unions, cottage industries, etc. Special efforts are also needed, to plan businesses which would specifically further national goals in new areas targeted for development.
- Women may not totally agree with the government on the direction and priorities of these development goals. Tourism, for example, may be part of the development plan for the country, even though it may be considered by some as an unfavorable extension of the colonial heritage. Nevertheless, tourism is a reality; and should be taken advantage of to open up opportunities for women’s businesses, for example, replacing some imported food and materials used in the industry, with locally-grown produce and manufactured goods. Another example would be to explore non-traditional business areas, such as shipping, for new opportunities for women. All this activity would not preclude a long-term plan to influence the decisions on types of industries to be emphasized in the future.

Industry. When formulating projects that are employment-related, it is important to know:

- Has the industrial sector been expanding? at the same time unemployment has risen? at a higher rate for women than for men? what are the reasons?
- What new industries are in the planning stage, starting up and where?
- How will women be affected by new industries? By new imports?
- Do national statistics include women as part of the labor market?
- Are occupational training programmes open to women?
- Are there job-placement agencies available to women?
- Are women used in particular jobs for particular reasons? are they paid equal wages for the same work done by men?
- Do labor laws and unions protect and promote the rights of workers, including women?

Advocacy groups. Strategies must be developed to:

- Help women participate in advocacy groups, political parties, trade unions.
- Train women to take leadership in the formation of new advocacy groups.
- Seek diversified sources of support for advocacy groups to maintain autonomy and independence when dealing with government.

Decision-making positions. Some points to keep in mind when formulating projects for training women for leadership roles are:

- Women are making some progress in achieving high-level positions; but long range plans are required to encourage young women to aspire to and prepare for decision-making positions in politics, government, education, law, agriculture, energy, environment, financial institutions, and industry.
- Thought must be given to developing “fast-tracks” for women, while avoiding negative effects on their lives. Special training, scholarships and fellowships should be identified and made available to women who have demonstrated a capacity for working effectively in a specific development activity.
- Women with special training and experience have a leadership responsibility to retain their concern for women’s issues and the improvement of the quality of life for others, to remain committed, to constitute a special cadre of developers.
- More women need to be included in adult education and training programmes, particularly those experienced in community work.
- Attitudinal, legal, and institutional barriers to women at all levels need to be identified and overcome.

Regional cooperation in these types of activities has accelerated in the last five years and can help to produce new breakthroughs in the development process. Women are not only demonstrating leadership in their own countries and regions, but are contributing to the exchange among women on global issues as well.

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Exercise

List special considerations you would recommend to others, based on past experience in formulating projects.

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B. Identifying Programme Resource Requirements

If women are to make real progress, they must have the *resources* to plan and implement their own programmes and projects. Without the essential resources, programme objectives can be a delusion. Historically, funding channels have been closed to women. But women will no longer stand on the sidelines; they are vigorously pursuing access to the mainstream of the economy and to sources of money.

To maximize limited resources in ways that will ensure programme viability over time you must:

1. Define programme staffing and training requirements.
2. Identify programme materials needed.
3. Determine long-term and short-term financial needs of the programme.
4. Consider potential sources of funding.

1. Define programme staffing and training requirements¹⁸

As discussed earlier in programme policy guidelines, the staff should serve as resource agents to assist women to increase their decision-making capabilities. Top-heavy institutions of “experts” and “specialists” are not needed. Duplication of effort is a waste of everyone’s time.

It is therefore important for the programme unit to define its role carefully.

- If a women’s unit sees itself as the implementer, and sets its programme objectives in a given area, such as agriculture, a large staff with experience in the subject might be required.
- But by defining its role as catalyst, facilitator, or resource agent the same unit would be able to manage with fewer staff members.

Before making decisions on staffing and training you should:

- Find out what professional resources are already available.

¹⁸Further details on methods that can be used for this activity are to be found in Part Two, Chapter V.

3. Determine long- and short-term financial needs of programme

Prepare a budget to translate the programme into money. If you are required to use budget forms, follow them precisely. If there is no set format, your budget should be broken into two sections: personnel costs and non-personnel or operating costs. Be realistic about your estimates.

Personnel Costs

- Wages and salaries, consultant fees – list the job title, monthly pay rate and percentage of time to be charged to the budget for each staff position directly related to the programme. Build anticipated salary increases into successive years' budgets. If several key staff from your sponsoring organization will be “donating” a portion of their time to your programme, they, too, should be listed—as shown in the budget example.
- Fringe benefits, usually expressed as a percentage of the total wages and salaries cost (investigate the range for your area). The programme staff should receive the same benefits as do other employees of the sponsoring organization, which may include insurance, severance pay, retirement, sick leave, and other.

Non-Personnel (Operating) costs

This portion of the budget includes all the other costs directly related to the programme.

1. *Facilities* – space for which you pay rent, as well as space donated for your programme use. If charges for utilities and building maintenance are not included in rental charge, itemize separately.
2. *Rental, lease or purchase of equipment* – list any piece of equipment that is absolutely necessary to conduct the programme. (Include any equipment to be donated to the programme). Look into the advantages of renting or leasing equipment with an option to buy.
3. *Consumable supplies* – these are office supplies that will be used – such as paper, pencils and other materials essential to the work.
4. *Travel* – separate local travel from out-of-city-travel. Be certain to justify why out-of-city travel is a necessary part of the programme. Include estimated number of days and per diem based on that allowed by the sponsoring organization.

5. *Communication Costs* – include telephone charges estimated per month (installation costs, if relevant); and estimated postage costs, cables.
6. *Project Development Costs* – include pre-project design costs toward the preparation of separate budgets for project activities, i.e., seminars, reports, training programmes where appropriate.
7. *Other* – this is a “catch-all” category for items such as special insurance, publications. List each item by name and amount. It is advisable not to list Miscellaneous.
8. *Contingencies* – include an estimate of a) physical contingencies, i.e., allowances for miscalculations or omissions and b) price contingencies, i.e., inflation and other changes you have no control over. Some organizations calculate 10% for the former and 15% for the latter added to base costs. In the sample budget below a total of 15% was used.

SAMPLE BUDGET FORMAT/PERSONNEL COSTS ONLY

Year One

<i>Salaries and wages</i>						
<i>Job title</i>	<i>Monthly salary</i>	<i>% of time to programme</i>	<i>Number of months</i>	<i>Total required of funding source</i>	<i>Total in kind</i>	<i>Total programme costs</i>
Programme Director	\$ 2,000	100%	12	\$ 24,000	–	\$ 24,000
Researcher	1,200	100%	12	14,400	–	14,400
Communications officer ^a	1,200	100%	10	12,000	–	12,000
Consultants (various) ^b	–	50%	6	10,000	–	10,000
Secretary ^c	700	100%	12	–	\$ 8,400	8,400
Bookkeeper ^d	800	50%	12	–	4,800	4,800
Total salary and wages				\$ 60,400	\$ 13,200	\$ 73,600
Fringe benefits = 12%				7,248	1,584	8,832
Total personnel costs				\$ 67,648	\$ 14,784	\$ 82,432

^aThe communications officer is listed for ten months. This is called phasing-in staff, since it is not realistic to assume all will begin the first day of the programme.

^bConsultants on an as-needed basis for total of six months.

^cSecretary is full-time with programme, 50% of salary donated by sponsoring organization.

^dBookkeeper is 50% with programme, paid by sponsoring organization as its full-time employee.

Any budget item that will not be easily understood should be explained in a budget explanation page attached to the back of the budget. If an item is being explained in more detail, reference that fact on the budget page.

Separate budget estimates for each year of the programme period should be prepared. Another way of preparing the budget is to list cost columns for each year, side by side, in the same budget. In any case, it is important to know and to demonstrate to potential funding sources how the programme will continue to operate when their funds run out.

Few, if any, funding sources will continue to fund the total operational costs of a programme they start. They prefer to see their funding of a programme as an investment; and, if the programme is successful, they expect the continuation of the programme to be someone else's responsibility. It is recommended that a written plan be presented to the funder(s) that will assure them the programme will continue. Ideally this should be in the form of a written commitment from an agency/organization agreeing to provide the continuing support. Another way to continue the work of a programme is to get another organization to adopt the objectives of the programme. The programme unit can then cease operations.

Funds generated by the programme itself, such as service fees or subscriptions to publications, need to be listed. If a programme is jointly sponsored that must be reflected in the budget.

4. Consider potential sources of funding

The same principles apply whether we are in need of funds to begin a programme/project, or an income-producing activity. You should know where you are going and how you intend to get there most efficiently and effectively. A small business will fail if it doesn't know what it is doing; there is little room for error in the business world. This is no less true when you are entrusted with the funds of others to produce specific results. The bottom line is: Did you do what we set out to do, according to the design, within the time frame and costs estimate.

Right attitudes toward money are needed – how to get it, maximize its usefulness, and leverage it to get additional funds. Women have learned to budget money in miraculous ways within the family setting, but are often intimidated in the larger economic arenas. Fortunately that is now changing.

Be aggressive in your search for the right amount of money from the right sources for the programme and its related projects. The time spent in reviewing

funding sources will not only help locate programme funding, but will enable you to advise women in project and small-business development.

Here are some ideas on money sources:

Contracts: for services with government agencies, corporations or NGOs.

Grants: from local, foreign, international or multinational government agencies; from foundations, from church groups, trade unions and other NGOs.

Credit and Loans : from banks, credit unions and other financial institutions.

Savings: from interest-bearing bank accounts, revolving loan funds.

Equity capitals: (your own and that of other women, friends and relatives) as an investment for the start or strengthening of a business.

Gifts: endowments and bequests from individuals, institutions, clubs or corporations.

Interest: on saving and investment.

Return on investment: from your own business, Bonds, Treasury Bills.

Revenue producing activities: from publications, subscriptions, food/clothing sales, reffles, bazaars. . .

In-kind services: from individual professionals, volunteers, organizations.

Scholarship, fellowship and travel grants: from universities, foundations, governmental agencies, corporations, other.

Matching your funding needs to the most appropriate sources requires some investigation. Investigate locally accessible sources first: e.g., local organizations or offices of national, regional, and international organizations. The funding resource books listed in the reference section will provide you with a start. Sources are classified at local, regional, and international levels.

A more difficult task is to uncover the less obvious sources: e.g., international agencies such as the UNDP channel funds through national governments to carry out specific development plans and projects. Contact with local representatives of the UNDP and other UN agencies and with the appropriate government officials will be helpful in discovering where the money is within the government and how women can get it.

Before preparing a proposal find out all you can about the organization being approached. What proposals have they funded in the past? How much have they given? This can help in locating the most receptive source.

SAMPLE BUDGET FORMAT/NON-PERSONNEL COSTS^a

Year One

<i>Budget Item</i>	<i>Total requested of funding source</i>	<i>Total in kind</i>	<i>Total programme costs</i>
Facilities			
Programme office (X sq.ft., X \$\$ per sq.ft. \$\$ per mo. x 12 mos. including utilities)	\$ 4,800	—	\$ 4,800
Programme local office	—	\$ 2,100	2,100
Equipment/supplies Typewriter, reproduction, materials for documentation	1,020	2,700	3,920
Travel			
Local (describe) To and from Programme Office and Projects Sites	1,500	—	1,500
2 trips to Regional Meetings	3,000	—	3,000
Communication			
Telephone	1,200	—	1,200
Postage	500	—	500
Project development			
Seminar (describe)	2,500	—	2,500
Research report	800	—	800
Training	1,500	1,500	3,000
Other			
Insurance	—	1,200	1,200
Publications on programme activities	2,000	—	2,000
Total non-personnel costs	\$ 18,820	\$ 7,500	\$ 26,320
Total personnel costs	\$ 67,648	\$ 14,787	\$ 82,432
Base costs – Year one	\$ 86,468	\$ 22,287	\$ 108,752
Contingencies	\$ 12,702	\$ 3,343	\$ 16,312
Total	\$ 99,170	\$ 25,630	\$ 125,064

^aObviously, figures do not represent actual costs.

Early contact should be made with the funders for their inputs to the design of the programme/project proposal. This can save time and misinterpretations right from the start.

Other factors to keep in mind when selecting a funding source are:

- Type of organization, and its ability to give to a programme such as yours.
- Amount requested in relation to range of previous awards.
- Philosophy of your organization *vis-à-vis* the funder.
- Expectations of the funder.
- Criteria funder uses in approving grants.
- Timing of request in relation to funder's deadlines.

You must be sure to maintain your independence. It will help if you try to have a diversity of funding sources and control in the funding process. Equally important is to do some long-range planning, so that you are not caught short as a programme or project is about to end. Some organizations develop revenue-producing activities as a way of subsidizing projects.

The informal system is an important factor in the search for funds, as well. Put your experience to work in identifying the individuals within the funding agencies who should be contacted. Ask your friends for assistance; as with most social situations, personal relationships that are based on mutual understanding and trust are an essential ingredient in the funding process. This is a result of sharing ideas, experiences, and resources. The funding sources need not only a well-presented proposal, but also the feeling of confidence that the people involved will make it work.

In the course of the search you may discover monies available to you that do not fit your central programme or related projects. Resist the temptation to change course to take advantage of this money —unless you and your team of players are really convinced that it has more value than the priorities you have set. A better way might be to join forces with others to apply for this grant —thus expand your programme activities.¹⁹ See Part Two for additional information on this subject.

¹⁹See "Funding Issues for Women's Projects" for helpful insights into recipient — funding source relationships.

Exercise

1. Identify three potential sources for your programme, with reasons why you chose each.
2. List three revenue-producing activities, not already mentioned above, your organization might initiate as a way of making your programme self-supporting.

C. Writing the Programme Plan and Proposal

Now you begin to put your ideas down on paper. The need to write it down is obvious when it comes to preparing a proposal for funding. The need for a written programme plan is perhaps less obvious, but is just as important.

To understand the relationship between the programme plan and proposal writing and to identify the types of information used in each, study the following sections:

1. Determine contents and write programme plan.
2. Select appropriate components of plan for proposal.
3. Prepare programme proposal.

1. Determine contents and write programme plan

A written programme plan is, in effect, an in-house programme proposal. Going through the steps of putting a written plan together helps you rethink the implications of the information you have gathered and recall your discussions about it. It will also help you analyze the implications of revisions that will undoubtedly be made as the programme proceeds. It will serve as a useful orientation tool for new staff members or consultants. There is no rule about its scope or length. It should be tailored to your needs and the needs of your organization.

The “Content of Programme Plan” chart that follows should be used as a “shopping list” for developing your own. It need not be as comprehensive as the sample. Make it simple, clear, workable, and flexible.

CONTENTS OF PROGRAMME PLAN

<i>Item</i>	<i>Description</i>
1. Table of contents	Subjects covered in plan and where to find them.
2. Introduction	Purpose and uses of the plan.
3. Summary for officials	Digest of major provisions of plan that can be circulated separately if necessary.
4. Organization/agency scope and goals	Nature of the programme and related projects and how they contribute to purpose of organization/agency.
5. Situation analysis	Facts and assumptions on which plan is based.
a. Assumptions	Report on overall situation of women in nation.
– Women	Report on development planning in relationship to situation of women.
– Development	
b. Resources	Key personnel, talents, resources, capabilities, and techniques to be used.
c. Potential impact	Quantitative and qualitative information on whom programme will reach, how they will be reached, their needs and attitudes.
d. Linkages	What other organization/agencies are active in this programme area, and what will be points of collaboration and cooperation.
6. Current organization structure	What are programme and/or unit lines of authority, responsibilities (perhaps include an organization chart).
7. Programme objectives	Results expected, and where you want to be next year and future years.
8. Programme strategies, policies and procedures	General description of types of projects that will be initiated, approaches to be used, and levels of funding needed.
9. Operational plan	Specific activities with respect to project development, research, communications, etc.
10. Schedulless/ assignments	Who does what, where, how and when.
11. Personnel plan	Availability and needs.
12. Budgets	Required resources, costs, and risks.
13. Balance sheet	If unit and/or programme is on-going, prepare accounting statement.
14. Monitoring	Procedure for measuring and controlling progress of planned actions.
15. Continuity	Procedure for keeping plan updated.

2. Select appropriate components of plan for proposal

From discussions you have had with the funding agency to which you are applying, you will know what interests them most about your programme and what points should be emphasized. You have already done the groundwork for the proposal by collecting data and writing a plan. That data may now need to be supplemented and recast in a way that will make the most sense to the funding source. But the plan remains the frame-work for programme and related-project proposals.

3. Prepare programme proposal

Before you start to write, read the guidelines from your funding source carefully, until you understand them well. Guidelines must be followed.

Listed below are the basic kinds of information required by most funding sources. The categories may have other names or may be in a different order, but generally the same type of information is requested.

Other categories which may need to be included in a proposal, depending on the funding source, include:

- Linkage (or coordination) with other agencies;
- The planning process used;
- Dissemination plans; and
- Detailed information on the methods and instruments to be used (usually required for research proposals).

The Appendix should include only information which is necessary to explain fully the points made in the proposal narrative. Quality should not equate with quantity. Items which are sometimes asked for are:

- List of applicant organization's Board of Directors;
- List of prior and/or current grants and contracts;
- Summary of audit reports;
- Resumés of principal staff members;
- Job descriptions of programme staff;
- Personnel practices of the organization; and
- Letter of support from local agencies and potential clients.

<i>Category</i>	<i>Other Names for Same Category</i>
Abstract	Summary
1. <i>Statement of the problem</i>	General objectives; justification of need; purpose; problem identification; history and needs statement; assessment.
2. <i>Programme objectives</i>	Primary objectives; development objectives and immediate objectives; programme goals.
3. <i>Programme approach</i>	Methodology; procedures; description of activities; programme operation; methods; plan of operation; rationale.
4. <i>Target group</i>	Characteristics and needs of persons to be benefitted; intended participants.
5. <i>Project administration and time schedule</i>	Qualifications of applicant; related experience of proposer; programme management; programme administration and staffing; planning calendar; work plan; timetable.
6. <i>Programme monitoring and evaluation</i>	Assessment and evaluation; programme evaluation; programme reports.
7. <i>Future funding</i>	Future financing; continuation plans.
8. <i>Budget</i>	Detailed budget; budget estimate for all years of support.
9. <i>Appendix</i>	

If you initiate your own proposal without following a special format, include additional information, such as a brochure about your organization's services, samples of your publications, and reprints of articles about your organization. These items could strengthen the case for your capability to deliver what you are proposing.

Each category covered in the proposal narrative section should be factual and concise, and the intent of each category should be clear. Funding-source people who must review countless proposals appreciate a proposal that is written as briefly as possible, yet gets across the idea clearly. Other points on project proposal content are covered in Chapter V, Section B.

Chapter III

Programme Implementation

A. Management of the Programme

To accomplish its goals, the programme must be managed well. The foundation of good management is planning –but it does not end with a good plan.

To implement the programme, there are four essential functions of management.

- Planning
- Organizing
- Coordinating
- Appraising/monitoring

Each of these functions must be on-going and applied to all aspects of the programme. Recognizing that the environment in which the organization operates is constantly changing, it is not sufficient to simply react to events taking place around you. Change must be anticipated –that is, you must plan and organize for change.

Activities must be delegated and coordinated –that requires assessment of individual performance and progress of the programme. Chapter VI, Project Implementation, talks more about management.

B. Communications and the Programme Plan

Some of the most serious problems in implementing development programmes and projects center around institutional constraints. You undoubtedly will not find

unanimity, for example, around many of the ideas and methods presented in these GUIDELINES. In almost any development effort there are human conflicts and many organizational units which in one way or the other can impede the forward movement. Whether governmental or non-governmental, these units are made up of people. And communicating with people is the lifeline of the entire development process. A new view of communications is necessary. . . a view that reinforces the conviction that development is a group effort that results in conflict-resolution and increased collective strengths.

Communications should be understood as a social (change) process through which people share information, knowledge, experience, ideas, skills, motivations and aspirations. To plan communications within a programme context, we must:

1. Establish communication needs.
2. Determine the purpose, type, and frequency of communications.

1. Establish communication needs

The following people will be involved in the implementation of the programme. It is important to establish good lines of communications with:

- Intended beneficiaries – begin communications by asking them their needs. The communication process must flow in both directions and must be continual. The result should be as much learning from them as offering information and knowledge for them to choose to use or not.
- Primary implementation unit – the program staff and any external consultants/advisors. An open on-going exchange is necessary, through informal staff meetings, reports, other.
- Intermediaries – development or extension workers from other collaborating organizations. Orientation and training on the specific objectives of the programme/project can help motivate and upgrade skills.
- Technicians – from your organization or other agencies in the government. Need to call upon them for their knowledge and resources.
- Administrative support – civil service, procurement – and cooperation makes life much easier.

- Policy level support – full commitment by policy level administrators within appropriate ministries, planning unit, and at the political level. This support may be necessary at the subnational level as well. General public support is sometimes needed to encourage political and administrative support.
- Funding source(s) – important to maintain contact, relate a success, problem, progress, or to ask advice.
- Media – just as development workers have not utilized communication resources properly in their development planning, so have communications workers failed to understand the development process, and therefore, the information flowing through the various media channels has not supported development programmes. This is especially true of the stereotypes communicated about women. Part of the communication plan for the programme should include the media.²⁰

2. Determine the purpose, type, and frequency of communication

A part of all operational plans should include an item on communication so that it becomes integrated into the day-by-day work schedule. At the same time a communication plan should be made for a systematic “outreach”. The following worksheet might be of use in this regard.

The columns ‘purpose’ and ‘type’ should focus us on why or what we hope to convey. The communication could be a telephone call, a video or vu-graph presentation, a meeting, a discussion over coffee. The challenge is to find ways of stimulating “exchange” and “listening”.

²⁰1WTC, *Women and Media*, First Quarter 1981.

WORKSHEET

<i>Unit</i>	<i>Purpose</i>	<i>Type</i>	<i>Frequency or Dates</i>
Intended beneficiaries Primary implementation unit Intermediaries Technicians Administration support Policy level support Media			

C. Providing Technical Assistance for Projects relating to Overall Programme Goals

Technology is a method, tool or technique, for achieving a practical purpose. A new technology is often rejected by the intended users if they feel they have had no involvement in the decision-making process. Therefore, these questions need to be asked:

- Who makes the decision of what technology is developed?
- At what level are these decisions made?
- Who disseminates the results? To whom? How? Where?

These questions are important. We need to examine carefully our feelings on technology because how we view technology can make the difference between assisting women and their communities or hindering them in their self-help efforts.

We need to assess the situation and determine points of contact and who makes the contact so that we can:

1. Initiate and/or respond to local initiatives.
2. Provide technical assistance for on-going projects.

- A continuing process not only of awareness, but of assessment and action, is the aim to help women and their families see the broader realities:
 - Rights as citizens;
 - Responsibilities as members of society;
 - Opportunities and choices for themselves; and
 - Ability and freedom to act individually and with others to change their situation.
- This three step process –*awareness* of the facts of a situation, *assessment* of their causes and desired changes, and *action* (individual and group) to close the gap between what is and what is the desired situation– is appropriate in situations requiring change at all levels with variations according to social need and environmental differences.
 - The three steps do not necessarily occur in order but should not be separated from one another; for example, action without assessment can lead to inappropriate solutions. Awareness without action, or mobilization as it is sometimes called, can produce inertia.
- If women ask for help in the beginning of a particular project they have already begun the learning process. They can be assisted in discovering gaps in their projects:
 - Have all the major facts of the situation been considered?
 - Is the proposed action a result of an assessment of all the options open to them?
- Introducing a programme–related project to women in the local community may be a longer and more sensitive process.
 - General information should be available about the subregion and village identified for the project.
 - Entry points are necessary to find a way of approaching traditional institutions, or on-going development project, institution, government or non-government activity.
 - The community would be asked to decide on priority areas of need if there is an interest in working together.

This method of “awareness-assessment-action” should be the foundation of all other development technologies. It is the embodiment of “participation”. A note of caution –consciousness raising, mobilizing and organizing for action can be very controversial. “Transfer of rights and power from a handful, or a class, to others, means a *restructuring of social and economic relations*, which few systems can bear

to contemplate. . . Yet, it is not the *strategy* that generates revolution, but the capacity for change of the systems in which it is introduced that determines whether the strategy, if successful, leads to revolution or reform”.²³

2. Provide technical assistance for on-going project activity

As was emphasized earlier, the programme staff serve as facilitators. They are not expected to be experts in every area of technical assistance that may be required when a project is planned. Areas where specific knowledge or skills will be needed should be anticipated. Knowing where to go for that information, or who to consult when it is needed, is what is important. It is not necessary or desirable to have every needed expert on the programme staff.

It is also not necessary to “re-invent the wheel” each time. Use outside assistance for the immediate information needed and avoid the “wheel-maker” consultant.

As the programme staff acquires new experiences and skills, they may be called upon for technical assistance for other projects. In this way, maximum use can be made of available resources.

Technical assistance may be needed in such areas as:

- Pre-project research and proposal writing;
- Locating funding sources;
- Orientation and training for project staff;
- Links with institutions relating to the project;
- Marketing research for small enterprises;
- Management training for project leaders and/or heads of small businesses;
- Skill training, i.e., record keeping, accounting, report writing, applying for credit and loans, setting up revolving loan funds, specific skill training in product lines, for example, for food production and marketing –skills in preserving, packaging food;
- Monitoring and evaluating project activities; and
- Helping locate successful tools, techniques, and methods, identified as needs by the project, i.e., in the case of an agricultural project, water and food storage techniques, fertilizer, etc.

²³“Concentration-Mobilization Strategies: Alternative Approaches for Development of Disadvantaged Urban and Rural Women”. UNDP/APCWD Project, RAS/78/045.

D. Monitoring and Evaluating the Programme

Funding organizations require programs and projects to be monitored and evaluated. These two categories are a part of every project proposal.

Monitoring and evaluating help keep the project producing effective results and should not be seen as negative functions –judging people and activities for where they have gone wrong.

You can understand the difference between monitoring and evaluating, the need for both and the basic steps necessary to carry them out by reviewing how to:

1. Establish procedure for keeping plans updated.
2. Establish procedure for evaluating programme performance.

1. Establish procedure for keeping plans updated

There are several steps to reviewing progress in a programme and its related projects:

- Monitoring the management of the programme, and
- Monitoring the content –or meeting the immediate objectives.

Monitoring progress during the life of the programme not only provides the information you will need for a final evaluation, but also allows you to make necessary revisions which will improve the chance of a successful conclusion to the programme and positive evaluation.

The monitoring function should be built into the normal reporting procedures, so that it does not become cumbersome. One way of doing it is the following –you may find more efficient ways–:

- List about 10 simple questions that will help you determine how well you are keeping to your programme plan –management, and content. Your funding agency may also have specific questions it wants answered during the course of the programme.
- List the categories and types of information or reports you will need to answer these questions, who will produce them, and on what time schedule.

- Collect and study the information on specified dates and determine what changes might be required in the programme objectives and overall plan. Revise the plan if necessary and communicate with all those affected.

This process continues through each phase of programme activities. In case, of long-term programmes, some funding agencies require a formal review after two years.

The project participants will be carrying out the monitoring within the projects and reporting back to you. You will be monitoring their review and revision of project objectives and reflecting those revisions in the overall programme plan. The need for additional technical assistance at the project level may be revealed by these reviews.

2. Establish procedure for evaluating programme performance

Evaluation is a thorough investigation of the programme/project's effectiveness, including the relevance, soundness, and validity of its objectives and outputs, and its actual or potential long-term impact. That is why it is so important that we have our objectives clear at the onset.

Normally, evaluations are conducted by persons who have not been directly and closely involved in programme/project design and implementation, although it is essential that the programme/project teams cooperate with the evaluators. This decision will be made together with the funding agency, and the procedures established with the executing group.

Evaluation methods are continually being tested and revised. International agencies such as the United Nations Development Programme (UNDP) and more recently the Voluntary Fund for the UN Decade for Women, are developing approaches that may prove useful. Many local groups are also working on self-evaluation methods that are simple and concise, and not dependent upon the systems devised by layers of large institutions. This is particularly true of small projects, where evaluation costs could amount to more than the project costs themselves. Investigation needs to be made to identify the best methods for each programme and project (see Chapter VI, Section C for more on evaluation).

Part Two

Project Planning

Introduction

Part Two of the GUIDELINES discusses approaches for use by members of programme staff who are directly involved in providing assistance with start-up and on-going operations of local projects. (We will refer to staff as development workers –other titles are programme officers, extension workers, field workers.)

The methods, techniques, and materials used in operations should be adapted to the environment –rural or urban– and to the culture and aspirations of the people; but there are some common characteristics:

- Personal one-on-one contact based on mutual respect; at all levels –from village to funding agencies and government.
- Participation of women in development through an awareness-assessment-action process.
- Transformation of exploitative relationships based on sex/class into voluntary relationships, allowing women to make choices about how they spend their time and energies and yet not alienate themselves from their families and communities.
- Organizing groups for community self-reliance with regard to basic food, health, housing, income and other life sustaining requirements.
- Appropriate no-cost and low-cost technologies, and new technologies that take into account the already existing local experience.
- Building support networks for the newly formed groups and development workers.
- Raising consciousness and responsiveness (policies and practices) of established institutions with which the groups will be dealing.

A vital element in assistance to local project development is the organization of effective training programmes for development workers, which take into consideration the realities of the village and urban communities and the most effective ways of applying these principles.

Chapter IV

Project Direction

A. Involving Women and Their Communities in the Planning Process

Development strategies which attempt to improve the economic conditions of the whole community and to restructure the socio-economic relationships between classes, have had very little effect on changing women's status. If they do succeed in integrating them into communities, they are locked into stereotypical and limited household roles. The sex roles assigned to women and the attitudes toward them are embedded in the structures and institutions of society and are perpetuated through them.

Project development by and for women is one of the ways of building self-confidence, improving skills, and filling needs through collective action. As previously discussed these projects can be "women-specific" or "integrated components" of larger development programmes. If they are the former, links should be made with broader development activities. This involves and benefits the entire community, not just the women.

A recent survey conducted in the Caribbean island of St. Lucia corroborates the importance of considering women as *agents* of development: . . . "the survey findings indicate that since both men and women are engaged in farm work, national and community level programmes in agriculture should be aimed at the farm family or household, not just the male farmer. This focus should be reflected in the selection and training of extension personnel and in their general sensitivity to the

economic and social roles of small-scale farm women. . . It is particularly important **not** to assume that: the man is usually or always the principal farmer. . . controls decision-making on the farm. . . there is a ready or easy transfer of knowledge or practices between family members, e.g., between male and female or young and old; and that because a woman says she is a “housewife” that she is not also a principal farmer and farm decision-maker.”²⁴

Appropriate entry points must be found for creative interaction with women in rural and urban areas, and basic assistance offered in the process of self-discovery and identification of needs and solutions for the improvement of the quality of their lives and those of the family and community.

Some of the steps needed to do this are:

1. Identify local initiatives and actual or potential initiators;
2. Form a working group;
3. Collect data and prepare community profile;
4. Assess information and determine major needs and priorities; and
5. Establish a community base of support.

*1. Identify local initiatives and actual
or potential initiators*

The development worker should keep in mind the common principles presented in the introduction, before trying to find a point of entry into the community. If the initiative for the project has come from the women in the community, and you are there at their invitation, the point of entry is clear. If not, some preliminary exploration is necessary, beyond whatever information you had for selecting this particular community.

- Make contact with local officials, leaders of the community, voluntary groups, and others who are in touch with local conditions. They bring another perspective, can point out limitations, and indicate what are government plans and resources.
- Walk around the community, talk individually or in small groups, get to know people such as village leaders, i.e., shop keepers, school teachers,

²⁴“Survey on the Economic Role of Women in Small Scale Agriculture in the Eastern Caribbean in St. Lucia-Improvement of Agricultural Extension Service”, Mimeo, 1981.

2. Form a working group

Form a group of volunteers from among the women, who are willing to and can give time to collect baseline data for a community profile –as the first step in project development. Since the women in the group come from similar backgrounds, they should be able to work together with mutual respect.

It is best if this group can remain together through all the steps of analysis of information, setting priorities, designing a project, writing the proposal, and staffing the project for implementation. One or two may even become staff members. Certainly, all should be encouraged to relate to activities throughout the life of the project.

oo

Exercise

From your experience, how would you answer:

1. Why do we need to work in a group?
2. What are characteristics of an effective group?
3. What are factors contributing toward a group sticking together?
4. What is the value of conflict in attitudes and ideas?
5. What are some ways of conflict-resolution?

oo

3. Collect data and prepare community profile

Earlier we spoke of primary data collection in programme planning. Sketching the community profile will result in primary data, i.e., in “getting the facts”, for the local community project at least. There will be interaction through the development worker, between what information the programme can offer on the larger scene and what information the project may need to complement the baseline information.

Your role in this step is to help the working group to acquire the skills and materials needed to conduct a baseline analysis. Interviews, observations and/or surveys could be used. Data about the community may already exist –many communities have been “over-surveyed”. Find this out before you begin.

If data are already available in a clear, usable form, start with that and fill in the gaps with your own community profile. The process of doing it is important for the women in the group as a learning experience.

4. *Assess information and determine major needs and priorities*

Consent should be sought for personal interviews with some of the women during this period. These can be very enlightening. Make a list of simple general questions, to start the dialogue, such as:

- How long have you lived in the community?
- Do you have a family?
- Are you earning an income?
- Are there major problems in the community of concern to you and your family?
- Has anything been done about them? If so what? By whom?
- What do you think about what is being done? Valuable?
- What particular problems do you have as women?
- Have you thought what you might like to do about them?
- Would you have the time to be involved in activities that would help your family and community?
- Do you see there may be difficulties for you to do so? What are they?

These are only possible “starters”. Women are willing to speak freely about their thoughts if the exchange is informal. If you return to some of the women who were approached earlier, it will be even easier.

When a woman mentions a “need”, the interviewer should be ready with probing questions. If, for example, she says she would like to have more farming skills and earn cash income from her labor, ask what farming skills she already has? Does she plough, plant, weed, harvest? –Does she own the land? – Do other women she knows have the same desire and have they ever thought about what they could do about it? *An important cautionary note about not raising false expectations:* no promises can or should be made or implied during these interviews. They should be presented as a way of knowing better the situation and ideas of the women in the community.

Ask other development workers which interviewing methods were successful locally and train your interviewers in these methods.

If the interviews are relaxed and informal, the women could be asked if they would be willing to have their comments tape recorded and/or written in notebooks. From these records you would be able to make a list of the needs mentioned and with what frequency.

You will be able to identify priority areas as needs are repeated. If, for example, out of 30 items on a list, food production, water supply, the opportunity for earning an income, and child health care are on most women's list, you have your priority areas. Refer to page 31 for a possible procedure to determine priorities, using a Worksheet such as the one below to list them in order of importance.

The next step would be for the working group to meet and, with the use of *charts* or other *graphics*, begin to discuss the issues raised by the women to see if opportunities already exist in the community for the fulfillment of their needs. If not, discuss how these gaps might be filled.

The types of information to look for are:

General Information:	Number of people: male – female Geographic characteristics of area Climate Electricity for some or all Central water supply Roads
Economy:	Government and political organization Principal industries – ownership? Number of men and women migrated to area, out of area in last two years-Why? Most common types of employment. How many people earn living in agriculture? What types of crops?
Income:	Control over saleable products Average family income Percentage earned by women Economic arrangements between men and women within household Income producing activities in the informal sector, i.e., sale of home-made products in local markets, etc.
Education:	Number of schools, vocational and technical courses and centers. Adult education – how many programmes and who participates? Number of boys and girls in schools, to what age.
Health:	Most common health problems Number of clinics, maternal child care centers Number of doctors, nurses or paramedics attending the community.
Housing:	Material used in home construction Average number of rooms, and number of inhabitants More than one family in a house? How many own home?
Life and Customs:	Ethnic, religious and language data Daily schedule of a man? Woman? Household/family structures, decision-making and division of labor Means of communication Holidays, cultural centers/activities
Organizations:	Women's groups/organizations Community organizations working on development (government and NGO).

WORKSHEET

<i>Categories and Problems</i>	<i>Needs and Possible Solutions</i>	<i>Potential Links</i>
<i>General Information</i>		
—		
—		
<i>Economy</i>		
<i>Income</i>		
<i>Education</i>		
<i>Health</i>		
<i>Housing</i>		
<i>Life and customs</i>		
<i>Organizations</i>		

As a follow up to a small working group discussion, there should be a larger meeting of women in the community for their help in analyzing the results of these activities. Questions should be prepared ahead of time to help women examine some issues that may not be immediately obvious, i.e.: Are there local plans to begin a water system? Are the development goals of national and/or the local government compatible with those of women? Be specific with this one.

Wider participation will help, not only in testing the identified priorities, but in determining if there are others. These discussions will also ensure broader interest and co-operation in project design and implementation.

5. Establish a community base of support

The findings from these meetings should be shared with the broader community. Request help from the people and local leaders to organize a community meeting. The women themselves should describe how they went about collecting the information, and with the help of visual aides, present the community profile and the needs identified by the women.

It will be a good experience for them at this point to hear the reactions and questions from their community leaders. They can start to identify the people whose cooperation they can count on.

The original working group could be expanded for the design phase, or a new one organized. Depending on whether the project is solely a community effort or a joint one with a government or non-government agency, representatives from these and other relevant groups might be added. The group should remain small—eight to twelve people.

B. Designing the Project

Before designing a project you must know more about the particular situation or problems you want to solve. Too often development “experts” from outside the community appear with solutions in search of a problem. The solutions may be worthwhile, but are not necessarily applicable to this community at this time. This is true even when the solutions appear to correspond to identified community needs and priorities, for example, farming methods used successfully in other areas to increase food production; family planning methods; irrigation systems, etc. The women may, indeed, decide on these solutions or projects, but they must be given the opportunity to look at the options and the consequences of their choices. Keep

in mind the reluctance of the poorer villagers to try some agricultural innovations; the lower the income, the greater may be the aversion to risk because the pain of loss is far greater for the poor than the rich.

Before beginning to design the project it is necessary for the women to understand some of the fundamental principles of project design and how these principles can be applied by them in the project.

These steps are:

1. Define the problem addressed;
2. Establish project objectives and criteria for their evaluation; and
3. Determine methods and approach.

Factors to be considered in designing a project:

IS THERE A NEED?

Careful analysis of the necessity for the project is vital. The project must be clearly directed towards the meeting of a need that is felt by the women themselves, and which is of major importance to them.

DOES THE PROJECT UTILISE THE EXISTING SKILLS OF THE WOMEN?

Using the traditional skills that women learn as the base for project development means that little or no training is required and women are recognised for having worthwhile skills. Furthermore, when converted into co-operative employment, work is immediately available to women, while others are released to undertake other activities.

DOES THE PROJECT UTILISE LOCAL RAW MATERIALS?

To utilise the raw materials of a locality not only saves the finance and organization necessary for the transportation of materials from elsewhere, but it makes the project more relevant to the people involved. An analysis of the available resources and creative adaptation of this information transforms traditional skills into innovative projects.

IS THERE A LOCAL MARKET FOR THE PRODUCE OF THE PROJECT?

If the project being planned is to create employment opportunities through the production of goods, then it is necessary to analyse the nature of the market to ensure that it is capable of sustaining the industry.

IS THE PROJECT GOING TO HELP WOMEN TO BECOME SELF-SUFFICIENT?

The project should encourage women to develop their strengths, independence and self-reliance, and it should provide the means whereby this can be achieved.

DOES THE PROJECT INTRODUCE WOMEN TO NEW SKILLS?

While recognising the importance of utilising the existing skills of women, it is also beneficial to women that they learn new skills which can be used within the project, in another field, or as a basis for working for themselves.

DOES THE PROJECT RECOGNIZE THE NEED FOR WOMEN TO HAVE SOME DEGREE OF FINANCIAL INDEPENDENCE?

The notion that women do not need an income as much as men do, has dominated employment planning in most countries of the region. Women are not considered a target group. It is usually argued that it is enough if the men are employed.

However, within poor families where the man is the main bread-winner, the income of the woman is still vital to family sustenance. Women also require income in their own right for, although they may have significant control over family finances, they are at the same time vulnerable to desertion and widowhood which would leave them with nothing. Furthermore, there are significant and increasing numbers of women who are heads of households or who have primary responsibility for supporting the family. Financial independence decreases women's vulnerability and increases their freedom of choice.

DOES THE PROJECT INVOLVE WOMEN IN DECISION-MAKING AND MANAGEMENT?

Many projects fail to give women experience in the management side of the operation and thus do not give women the necessary skills to enable them to eventually become self-sufficient, and to transfer such skills to others.

DOES THE PROJECT INSPIRE SOCIAL CHANGE?

Primarily the project should not continue the exploitation of women. Rather, it should work to develop new methods of operation and new structures that provide both for the material improvement of women's condition, and the achievement of a feeling of worth and self-esteem, thereby making it realistically possible for women to become active participants in a new and dynamic development.

“APCWD Women's Resource Book 1978”

1. Define the problem addressed

The overview of the situation of women and the community has been made. The needs and priorities as perceived by them have been determined:

- Food production;
- Water supply;
- Earning an income; and
- Child health care.

Other priorities may also have appeared and you should be flexible. For example, if there are no small supply stores in or near to the village and organizing one would provide a good rallying point for the voluntary and cooperative effort of the entire village, as well as fill an immediate need of the community, this could take precedence over the other priorities.

But for the purposes of these GUIDELINES, let us continue with the four identified priorities. You would go deeper into each area for supporting data. These data are sometimes referred to as indicators: the information and statistics that will help identify the nature of the particular problem. These data serve also in setting specific objectives and later in measuring the progress made in achieving them. If the data are not collected at the start there is no basis for measuring change. Return to some of your previous sources to get this information.

For example:

<i>Problem</i>	<i>No.</i>	<i>Sample indicators</i>
Food production	X	acres cultivable land
	X	number of landless
	X	crops produced in X quantity
	X	home gardens X crops for family consumption
	X	food items bought in market
	X	food sold on market
	X	types of fertilizers and equipment
Water supply:	X	wells
Houses which get water from	X	through pipes
	X	rivers and streams
	X	tanks, buckets, other storage
Earning an income	X	cash income earners in community M/F, average income
	X	community stores
	X	products and types
	X	products imported to the community
	X	other
Child health care	X	suffering from malnutrition – other
	X	infant deaths
	X	mothers take children to clinics
	X	clinics and doctors in region
	X	children per family
	X	other

The qualitative information can be retrieved from taped discussions with women and supplemented where needed. We would be looking for indications of what the aspirations and fears of the women are, what has been tried and rejected; what is on the agenda of other groups that might cancel out a priority, lead to collaborative efforts, or a combining of the priority areas into a multifaceted project.

Then you must define the specific problem(s) chosen by the women for project design.

2. Establish project objectives and criteria for their evaluation

Objectives and criteria for a national programme for women and development were discussed on pages 31-32. The process is the same at the local project level. In fact, the example given in that chapter relates to the example problem areas just discussed. The development worker is the link between that particular national programme and the local project under discussion.

The following is an illustration of a logical framework (discussed on pages 34-35 and 86) for the above project.

Let us suppose, as these objectives would indicate, that the women decided to combine the three problem areas of food production, income generation and child health into one project. They dropped the problem area of 'water supply' because they discovered there were plans underway in the 'integrated rural development plan' of the area for improving the water supply. Instead, they assigned some of their group to a subgroup to work on getting women on to the larger rural planning group and to prepare a paper on what their water needs were and how they would like to have them met in the overall plan.²⁶

Defining specific problems indicates that "we know where we are", now "we want to know where we will be" at the completion of the project. To do that the group must go through the exercise of writing:

- Development objectives (long-term)
- Immediate objectives (primary)
 - Sub-objectives (secondary)

²⁶For an example of an innovative approach see "Pilot Project for the Integration of Rural Development in St. Vincent. How community programmes and projects can influence "policy", n.d.

Continuing the example, and the three problem areas combined in the proposed project, the objectives would be:

Development objective:

To involve women of the community in the increase of nutritional crop production, for family consumption and for local markets, thereby improving the health of their children and providing independent cash income.

Immediate objectives:

- To improve the skills of 25 women in the use of seeds, fertilizers, tools, etc.
Sub-objective: To prepare a training course and a demonstration garden to increase garden production from _____ to _____.
– Other
- To increase the number of women's small businesses by _____.
Sub-objective: To improve their cash income by \$ _____.
– Other
- To improve child health through better meals.
Sub-objective: To decrease the number of cases of malnutrition by _____.
– Other

Time should be spent on setting the objectives and analyzing their feasibility. For example, a marketing study should be made to see if indeed, there is a sufficient market for the products to be grown and what other options may exist. The objectives will go through several testing points, i.e., when you discuss the methods to be used and the resources available. They are very likely to be modified along the way.

It will help for the development worker to discuss the local objectives with her national programme staff to determine the type of assistance the project will need to meet the objectives and the best way of securing that assistance.

3. Determine methods and approach

This step is different from that of making a plan of operation. Deciding how to accomplish your objectives will call on the creative energies of the group. For example, they might decide the way they want to go about it is in three phases over a three year period, beginning with a cadre of leaders to become village workers, who would be selected by the community (or only the women of the community). The village workers would be trained in agricultural methods at a regional agricul-

Illustration

PROJECT LOGICAL FRAMEWORK

Community XYZ

<i>Narrative summary statement</i>	<i>Objectively verifiable indicators</i>	<i>Means of verification</i>	<i>Important assumptions</i>
<p><i>Development objective</i> To involve women of the community in the increase of nutritional crop production, for family consumption, and for local markets; thereby improving the health of their children and providing independent cash income.</p>	<p>Informed participation of women resulting in cooperative purchases of agricultural materials; increased food production, new markets for local products and decreased malnutrition</p>	<p>Official records of Depts. of Agriculture & Health * Records of group/organization implementing project; and/or records of individual women working on project.</p>	<p>—No major changes in government policy regarding such things as crop imports, land use, etc. —Other.</p>
<p><i>Immediate objectives</i> 1. Improvement in women's agric. skills. 2. Increase number of women's small business. 3. Improvement in child health.</p>	<p>1. 25 women trained and cultivating home gardens. 2. Six new small businesses. 3. Children touched by project (# no longer suffering malnutrition, + general decrease in illnesses).</p>	<p>—Local gov. agricultural and health records. —Local agricultural banks and training centers. —* As above.</p>	<p>— Acceptance by women of new techniques. —Stability in market prices. —Other.</p>
<p><i>Outputs</i> 1. Training and technical assistance. 2. Home gardens, crop increases. 3. Nutritious meals. 4. Cooperative stores food processing + marketing businesses.</p>	<p>1. Two village workers 25 village women. 2. One demonstration garden, 25 home gardens cultivated. 3. Increase in crops by _%. 4. Decrease in malnutrition by _%. 5. Six businesses involving 25 women and increase in income by _%.</p>	<p>—Local gov. agricultural and health records. —Community leaders. —Health clinics. —Participants + their families. * As above.</p>	<p>—Favourable weather conditions (no droughts, floods, etc.). —Other.</p>
<p><i>Inputs</i> 1. Agricultural center. 2. Training material. 3. Agricultural materials. 4. TA/Tr. to village women. 5. Marketing survey. 6. Project staff. 7. Budget \$ _____</p>	<p>1. Agreement to train village agricultural workers. 2. Curricula; one demonstration home garden. 3. Equip. + fertilizer for demonstration. 4. Two training programme + on-going tech. asst. in methods of food production + prep., + business admin. 5. Survey on food dis. survey on agri. supplies. 6. Project coordinator, clerk/typist, bookkeeper, staff organizers, village workers.</p>	<p>—Agricultural training center. —Local gov. agricultural supply units. —Univ./other centers of study concerning marketing of food products. —* As above.</p>	<p>—Availability of agricultural materials over time. —Other.</p>

Chapter V

Project Strategies

A. Identifying Project Resource Requirements

Resources fall into four major categories: people, information, materials and money. Every group undertaking requires all or some combination of the four. A basic principle in project development is to make every effort to use local resources. Very often external resources are sought without first asking if they are attainable locally. Even when external resources are used, they should be viewed as short-term, and as a means of 'leveraging' local resources to create self-reliant women and organizations.

To meet the objectives set by the women for the project, it is necessary to:

1. Develop a project plan.
2. Determine staff, materials, facilities needed.
3. Prepare a budget.
4. Identify specific financial sources.

1. Develop a project plan

The development worker should guide the group in drawing up a draft plan of the project. The plan can be finalized during the implementation phase but begin-

ning it at this point will give the group the basis for deciding on the number and kinds of staff, materials, information and money it will need. The plan can be used in the preparation of a proposal if outside funding is required.

The project plan should be written in a simple and concise language describing:

- Objectives of the project;
- Project approach and phases;
- Activities and allocation of work;
- Schedule; and
- Budget.

The first two items were discussed earlier. Project activities and allocation of work is the logical sequencing of activities, sometimes grouped under phases and categories of work, as follows:

SAMPLE

<i>Activities</i>	<i>Allocation of work</i>
Phase One	
A. Administration	
1. Write proposal	Work group
2. Follow-up funding sources	Person assigned by work group
3. Look for staff	All concerned
4. Staff orientation, etc.	Work group and other women leaders in the community
B. Groundwork for training village workers	
1. Contact agricultural center for arrangements	Project director
2. Select village workers	Women in the community
3. Village worker orientation, etc.	Work group and other women leaders in the community
C. Groundwork for start of small business	
1. Conduct additional marketing research	Staff members and government workers in commerce department
2. Design training programme, etc.	Women's organizations with previous experience
D. -----	-----
1. -----	-----

The Activity Sheets would be added to the Project Plan. One way of preparing the preliminary schedule for these same activities is through a Gant chart, as follows:

Preliminary Schedule of Activities

(Phase) or (Year) One

Activity	Month											
	1	2	3	4	5	6	7	8	9	10	11	12
A. Administration												
1.	→											
2.		→				→						→
3.		→	→									
4.			→									
B. Groundwork												
1.	→	→										
2.		→	→									
3.			→	→								

This type of preliminary schedule²⁷ is useful to see where certain activities overlap, how to sequence activities that depend upon the output of another, etc. During the implementation phase, each activity can be broken down into tasks with begin and end dates for a more detailed schedule. Usually this kind of a shedule is sufficient for the purposes of a proposal.

2. Determine staff, materials, facilities needed

You may be looking for full-time and part-time permanent staff, as well as technical consultants, and phasing them into the project as the need arises. Staff should be recruited locally and outside consultants —preferably from within the country— should be kept to a minimum.

A very important step often neglected is to identify job task and responsibilities from your list of activities, so that you can write up preliminary job

²⁷See project planning materials produced by World Education, for other concepts, techniques and tools.

descriptions. This should make staff recruitment and selection not only a little easier, but more related to specific needs.

If the project is sponsored by a local organization and/or jointly implemented with another organization, the facilities for operations might be donated by that organization, and the equivalent cost noted in the budget as such. If not, the working group will want to look for an inexpensive but adequate office space. They can borrow or rent (preferably the former) larger space for meetings and training when necessary.

The links established during the data collection phase with government and non-government organizations can now be used for specific information and material you may need for project implementation. Find out if it exists before producing it yourself. Look in the community before going outside for help.

Devise a simple worksheet to help list resources.

Example

<i>Resources required</i>	<i>Where to be obtained</i>
<p><i>People with skills in:</i></p> <ul style="list-style-type: none"> ● Agricultural production ● Training in small business <p><i>Finances for:</i></p> <ul style="list-style-type: none"> ● Training ● Small loans and credit for business start-up ● Project implementation <p><i>Facilities and materials:</i></p>	<p>Department of agriculture University agriculture institutes National non-profit consulting groups</p> <p>Local agriculture programme or center Local credit union, bank</p> <p>National government funds from UNDP</p> <p>-----</p>

3. Prepare a budget

The women in the working group probably will need special help with the budget. Start with what they already know; build on the family budget. Contact with experienced groups concerning their methods of preparing budgets, overhead accounts, and financial reports, would provide some real examples of how money can be controlled. Some of the questions which should be discussed before preparing a budget are:

- Will multiple sources of funding be sought? Donations of time, materials and equipment?
- What are salary levels paid by other projects in the area?
- What items should be included in the budget?
- What items, particularly those relating to infrastructure that donors are less likely to fund, can be carried by community funding?
- What are estimated costs for each of these items, based on quotes received? (worksheet attached)
- What is the level of funding required immediately and projected over time?
- What is the plan for future funding toward self-support?
(See pages 44-51 for other budget considerations).

WORKSHEET

BUDGET

<i>Items</i>	<i>Cost</i>					
	1st Year	2nd Year	3rd Year	Total	Community funds	Outside funds
<i>Personnel</i>						
Project staff						
Typist/clerk						
Technical consultant						
<i>Equipment & Material</i>						
Furniture						
Vehicle						
Typewriter						
Postage						
<i>Training</i>						
Stipends						
Materials						
<i>Space & Facilities</i>						
Rent						
Phone						
Utilities						
<i>Travel</i>						
<i>Other</i>						
<i>Base costs:</i>						
<i>Contingencies</i>						
TOTAL						

Special Considerations for Small Businesses

The plan for your business begins with questions only you can answer, or answers which only you must find:

1. What business am I in? How about a partner?
2. What are the marketing conditions and requirements?
Who are my customers, where are they, why will they buy my product/service instead of my competitors'?
3. What is my market?
4. Who are my competitors?
5. What advantage do I have over my competitors?
6. How do I propose to distribute my product or deliver my service?
7. What are the essential steps in production of my goods/services?
8. What are my sources of supply?
9. Do I know my labor needs?
10. Do I know my space needs?
11. How will I determine prices for goods/services?
12. What are my costs? (fixed and variable)
13. Do I have sufficient cash or credit?
14. What is my plan for meeting money requirements? Do I have an estimate of monthly expenses, orders and sales? (See following data sheets.)
15. What is my break-even point? (See Appendix D for sample break-even chart).
16. What assistance do I need in ordering stock, taking inventories, record-keeping, accounting?

DATA SHEET FOR ESTIMATING MONTHLY EXPENSES

From _____ to _____ 19 _____

<i>Item</i>	<i>Month #1</i>	<i>#2</i>	<i>#3</i>	<i>#10</i>	<i>#11</i>	<i>#12</i>	<i>First 12 months</i>	<i>Total</i>
Salary-								
Partner 1								
Partner 2								
All other salaries								
Rent								
Transportation								
Production								
Materials								
Other . . .								

DATA SHEET WITH ANTICIPATED MONTHLY ORDERS + SALES

From _____ to _____ 19____

	\$ Month #1	\$ #2	\$ #3	\$ #10	\$ #11	\$ #12	\$ First 12 months	\$ Total
Orders								
Company A	1.000	2.000	1.500	5.000	6.000	1.500		37.000
Company B	0	2.000	1.000	2.000	2.000	1.500		18.500
Other accts.	500	1.000	1.000	1.500	1.500	1.000		16.500
<i>Total</i>	<i>1.500</i>	<i>5.000</i>	<i>3.500</i>	<i>8.500</i>	<i>9.500</i>	<i>4.000</i>		<i>72.000</i>
Sales								
Company A	0	1.000	3.000	5.000	6.000	1.000		36.000
Company B	0	0	1.000	3.000	4.000	2.000		20.000
Other accts.	0	1.000	500	500	1.000	0		13.000
<i>Total</i>	<i>0</i>	<i>2.000</i>	<i>4.500</i>	<i>8.500</i>	<i>11.000</i>	<i>3.000</i>		<i>69.000</i>

4. Identify specific funding sources

When the budget is completed, a review should be made of the lists of potential sources prepared earlier. (See pages 48-51.) Seek the advice of local authorities, people from other projects, organizations in the community on available monies and their experience with applying for it.²⁸ The development worker can play a helpful role in this regard, but the women in the working group should go through each step, leading to the selection and contact with appropriate donors.

Some considerations:

- Small projects of \$ 1,000 or less might look for local private donations, loans from credit unions, cooperatives, revolving loan funds, or agencies known for providing small grants.
- Projects in the range of \$ 1,000 – \$ 10,000 might approach local women’s or other non-governmental organizations.
- Large projects of over \$ 10,000 (large especially for the community level) might find the local government a likely source.
- Still larger projects of \$ 25,000 and more, might look for multiple sources locally, but most probably will need to go outside the community –national government, regional or international organizations.

- Requests to the United Nations and its specialized agencies must generally go through the national government –this is also true for requests to other national government(s) agencies; in these cases, contact should also be made with the appropriate local representative of the country and/or UN agency. These local contacts can help identify monies available through their agencies, assist in proposal formulation, and in moving it through the system more efficiently and effectively.

Before approaching an agency, you should first be able to answer the following questions:

- What categories of areas of development does the project, or segments of the project, relate to, i.e., agriculture, education, training, housing, institution building, and so forth?
- Among the sources identified, which have given, or are likely to give money for projects such as the one designed?
- What are the policies, procedures and deadlines of these sources? Do they have guidelines? Applications forms? Do you require more information before you approach them? (See sample letter.)
- Do you have the name of an individual within that agency, who is likely to be receptive to our request?

On the basis of this information you should make the decision as to whom you will make your proposal. In some cases, it may be possible to have preliminary discussions with the potential donor, as many agencies prefer to work *with* recipients in formulating the proposal. The Project Work Plan –including the budget– can be used as the basis for these discussions.

B. Writing the Project Proposal

Many projects have been rejected on the basis of poorly formulated proposals, rather than because of what the project intended to do. A poorly formulated proposal is a signal to the funding agency that the problem and steps toward its solution have not been thoroughly investigated and thought through and therefore, it is not likely to achieve its objectives.

At this point in time, women often lack experience writing proposals and developing evaluation procedures. This does not mean that they do not have the ability to identify and respond to the needs of the community. With some coun-

²⁸See “Funding Issues for Women’s Progress: A Report of the Dialogue Between Women From Developing Countries and Donor Agency Representatives”, July 1980, Copenhagen.

selling and the exercise of drafting, reviewing and redrafting, the skills can be developed.

Negotiation is another skill that needs to be developed. It is not simply a question of writing a good proposal – rapport must be established with the funding source. It takes time to build mutual confidence and understanding of each other's requirements. The recipient must keep focused on beneficiaries of the project, while at the same time maintaining flexibility in meeting the requirements of the donor agency. This requires good communication and negotiating skills. For example, the criteria for evaluating the project and who will do the evaluating might be one area of negotiation.

The steps to take in the preparation of a proposal that reflects an understanding of the situation addressed and how to bring about the desired change are:

1. Review project background material.
2. Write the project proposal.

1. Review project background material

Much has been accomplished at this point. The baseline analysis and project plan have been completed. Many conversations have been held –with the women, local officials, potential sources of information and financing.

These will have given us new inputs, or pointed out gaps in the data base. This is the time for filling the gaps and incorporating the new information into the project design.

2. Write the project proposal

The working group should take responsibility for the proposal preparation. They may wish to assign one or two from among them to do the actual writing. The development worker can help guide the group particularly in interpreting the requirements of the donor agency.

Each donor agency –private foundation, government and non-government organization or UN agency will have different formats. Use the format of the agency to which you are applying, if possible. A sample format with description of the

needed information follows. See below examples of format and heading variations. Study the format well and discuss each section before writing.

The first draft should be circulated for critical comments and suggestions. It will probably need some rethinking and rewriting, until it reaches the point of acceptability. Don't be discouraged by the number of times you will have to revise or rewrite the proposal. This is a common experience for everyone.

Sample Proposal Format^a

<i>Section:</i>	<i>Description:</i>
Title Page	This page can serve as both the title page and the cover sheet for your proposal. It should have the following information: (1) Title of project; (2) Name of person applying for funding; (3) Name of organization sponsoring proposal; (4) Location and duration of project.
Summary or Abstract	Although this section follows the title page, it is frequently the last task in writing the proposal. The summary should be a concise description of the proposed project, not exceeding more than one page. It should briefly state the problem/need, the objectives, project approach, duration and the amount of money requested.
Problem/Need	Outline the specific problem or need your project seeks to address. When possible, document your statement with statistics or quotes.
Objectives	Provide a very specific description of the outcome of the project. They should be written in terms of your end-results, not the methods you will use to achieve them. Be certain they relate to the statement in your PROBLEM/NEED section.
Project Background	Historical and demographic information about the country/region where the project is located (population, income, education, health, and nutrition, profile on status of women). This kind of information is particularly important in applying to smaller foundations which cannot maintain the staff capacity to visit each project in the field.
Organization Profile	Briefly describe the history and functions of your organization. Again, the experiences you describe should relate back to the PROBLEM/NEED and OBJECTIVES, substantiating your abilities to undertake a project of this nature. This section is sometimes placed as an appendix to the proposal.
Project Approach	Describe the people who will benefit from the project, detail what is their involvement in the planning and implementing of the project; the methods to be used, any unique features, e.g., if introducing new ideas or technologies, relationship of project to other activities in the area.

^aAdapted from Information Kit for Women in Africa, UNECA/ATRCW, Produced by IWTC, Inc. Jan. 1981.

Section:**Description:**

Project Administration *Location:* Where will this project take place? Why was this particular site chosen? What facilities and equipment are available?

Personnel: State the number of people required and their function in carrying out the project's agenda. It is suggested that biographies or vitae of key individuals involved in the project be included in the appendices to the proposal.

Work Plan: This most important section will take some time to develop. You will want to describe the sequence of the activities you are planning, as well as specific methodologies and approaches. The importance of developing a specific and realistic work plan is very important, and it can be used as a guide once the project is operational. (A helpful tool in designing and explaining the work plan is to do a Gant chart and/or time bar. These can be included in the text or appendix to the proposal. See pages 89 and 98).

Evaluation You will want to discuss this component of the proposal with the prospective funding agency since reporting and evaluation requirements vary widely. Evaluating your project while it is underway will help you and your funding people see your progress and accomplishments, as well as the choices available for future action.

Budget The budget should be a realistic estimate of all costs involved in implementing and operating the project. For on-going projects, try to include a projected budget for the next several years, demonstrating, if possible, eventual *self-support*. Cost estimates should be broken down into logical categories, such as: personnel salaries; supplies and equipment; rent; telephone; postage, etc. Voluntary contributions made to the project by you and members of your organization should be listed and estimated as closely as possible in cash terms, or shown as "no charge". If you are applying for funds for a special project of an established organization, find out if you can request funds for overhead. For example, if you are operating a day-care center, but want to run a special training programme for one week, you should include a fraction of the rent, electricity, etc., that will be used from the day-care center during that time period.

SAMPLE TIME BAR

	<i>January</i>	<i>February</i>	<i>March</i>	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>
Phase I							
Phase II							
Phase III							

When your proposal is ready for submission to the donor, prepare a cover letter to introduce it. It should be concise and cover three basic points:

- What you propose to do –and why it is important;
- What benefits are anticipated and for whom; and
- What is the requested time frame and dollar amount.

If you have not had previous contact with the donors and do not have their specifications, you can either send a full proposal or a proposal prospectus, with a well-written, more comprehensive letter that, in addition to the above points, states how the idea for the proposal came about, who was involved and why you feel your particular group should be the one to do it. This could be sent to the government agencies/foundations you have identified as having an interest in the subject area which your proposal addresses.

Make a final check of the proposal to see that you have not left out any important components or points. (See pages 110-112.)

It is not unusual for a donor to request additional information, or even a revision of the proposal if they feel it is necessary. Many agencies specify in their guidelines the review process they use and state approximate lengths of time for final determination to be made on a proposal.

If you have a proposal turned down without explanation, you can write to the agency contact—person requesting a summary of the reviewer’s comments. This is valuable information which can be used to rewrite and resubmit the proposal –there or elsewhere— with a better chance for successful funding results. Chances are, if early communications are established, you can avoid this happening.

Chapter VI

Project Implementation

A. Staffing the Project

Even though the donor accepts your proposal, active recruitment and hiring of the project head or project coordinator should probably await receipt of the first payment, to be sure of meeting salary obligations.

The implementation of the project begins when the project coordinator is on board. She should be involved from the very beginning in determining who the staff members are and how the Project Work Plan will be put into operation.

The project should be viewed in much the same way as a small business. It will require efficient and effective management and administrative practices to keep the project “on design, on time, and on cost”, and to lead it through to the next stage, i.e., an organizational setting, an income-producing business, other.

To begin to accomplish this you should:

1. Review specific tasks to be performed.
2. Select personnel.
3. Prepare staff orientation and training.

Sample Letter

NAME _____

TITLE _____

ORGANIZATION _____

ADDRESS _____

COUNTRY _____

DATE _____

Dear _____:

It is my understanding that the (name of funding agency) administers funds (or provides technical assistance) for (project category, i.e., training projects, seminars, etc.) in the field of (subject area, i.e., income-generating activities, family planning, etc.) for women. I am writing on behalf of (name of organization), an organization active in the field of (state area of activity). We are planning to undertake a project to (provide a brief description of the objectives of the prospective project, adding a short sentence or two that highlights the unique features of the project)..

If this project is one which could be considered for funding by (name of funding agency), would you please send me the necessary forms and any other relevant information required for submitting a proposal?

If you think that this project is inappropriate for funds from your office, could you please refer me to a more appropriate source?

Thank you for your cooperation and assistance.

Sincerely,

NAME _____

Adapted from Mary Hall, Developing Skills in Proposal Writing, Second Edition. Portland, Oregon, Continuing Publications, 1977, p. 60.

1. Review specific tasks to be performed

The first specific task for the work group is to select the Coordinator, who must first of all be committed to the objectives of the project and to have demonstrated management abilities. This does not necessarily mean that she has headed a project or held a title of manager. It does mean that she is a woman with leadership capability, who has taken initiatives in her own village, and has seen some type of action through from idea to completion.

The role of the Coordinator is to manage. That means she must put into practice some of the things these GUIDELINES have been speaking about concerning: 1) planning, 2) organizing, 3) delegating, 4) monitoring, 5) appraising, and 6) communicating, in matters concerning people, money and materials. Special assistance with any of these functions can be sought from local technical advisors. They are skills that many women already have and use in their daily activity. They are given names used in the management field to help order thinking about them so performance can be improved. One of the indispensable roles is team building, which means in addition to being a manager and delegating work, the Coordinator will be very much involved in the actual work and encouraging her staff in their roles.

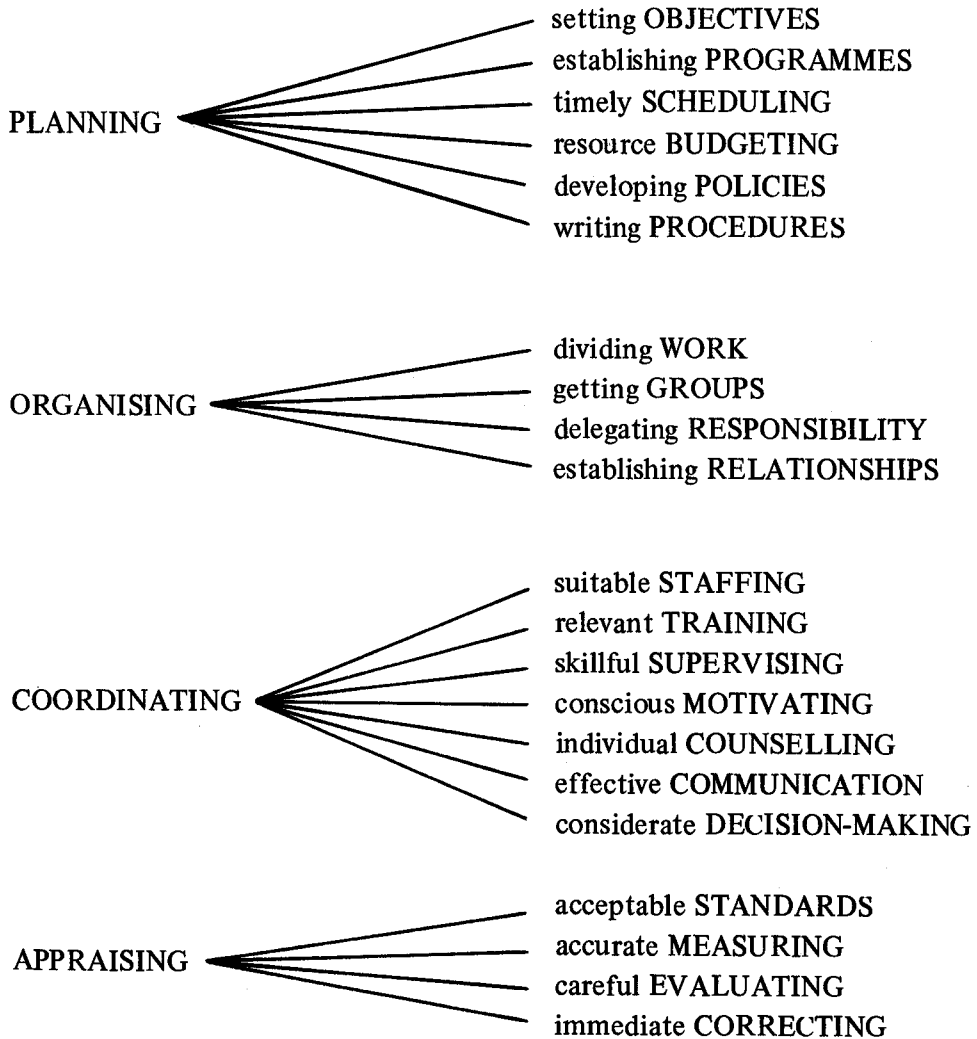
The sample organization chart for the agricultural project that follows shows visually what the relationship may be between the Coordinator, staff, technical advisors, advisory group, national programme (sponsoring organization) and the development worker. Dotted-line relationships signify periodic consultations and exchanges. The donor agency and other institutional links are not shown, but would be a part of the picture. These contacts may be shared among the Project Coordinator, her advisers and sponsoring group. An organization chart can be a helpful device for the project Coordinator to see more clearly who relates to whom. The danger, particularly with small projects, is in looking at relationships as hierarchical, rather than as open and sharing.

The implementation examples that follow are based upon the hypothetical three-year project described earlier.

After the Work Group transfers all of its data and other project-related materials and gives an orientation to the Coordinator, their role becomes advisory. The Coordinator now heads the project and must set up the project office.

She then must break down the activity list prepared by the Work Group into specific tasks. A helpful planning tool to accomplish this is the Impertinent PERT Chart ²⁹ (IPC) described in Appendix B.

SUMMARY OF MANAGING WORK

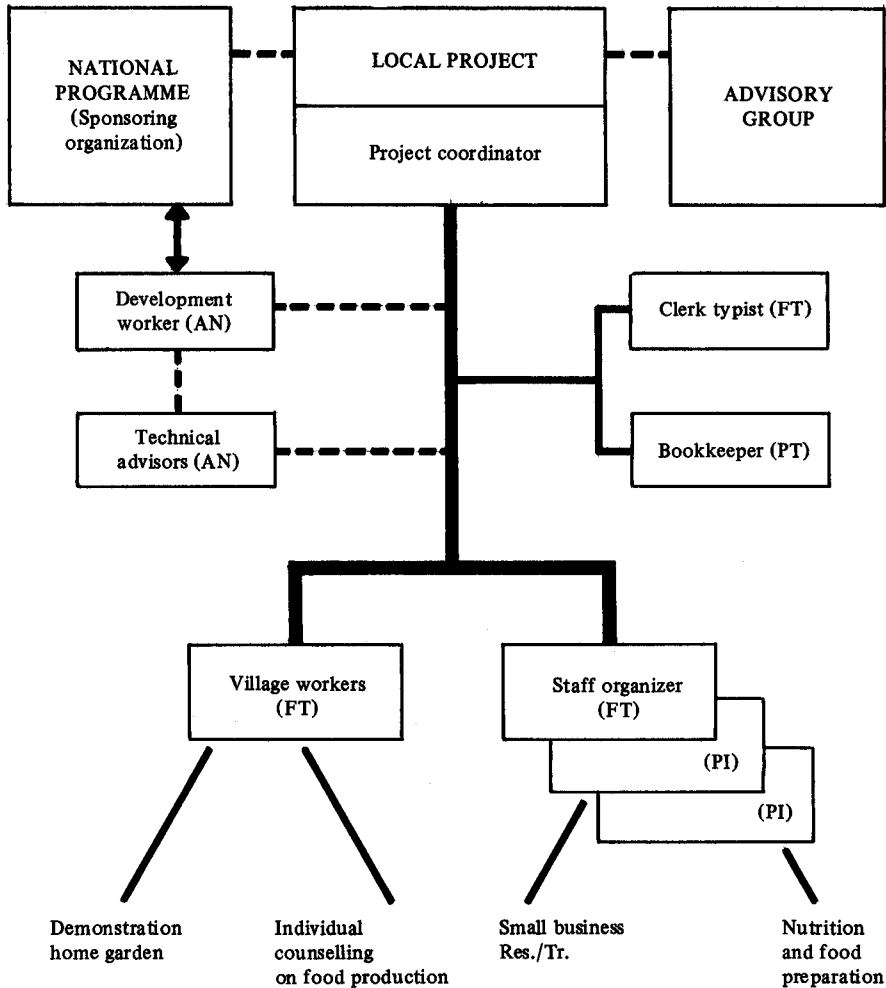


²⁹The PERT –Programme Evaluation and Review Technique– is commonly used among planners. World Education developed the IPC –a simple, less costly and more flexible adaptation of PERT.

2. Select personnel

The village workers, who would be paid a stipend by the project, should be chosen by the village women. Some criteria for selection should be presented to the women, so they know on what to base their selection, and the people proposed will know what is expected of them.

SAMPLE ORGANIZATION CHART



PT = Part time
 FT = Full time
 AN = As needed
 PI = Phased in F/T

Other staff members include project organizers. How many and at what points they will be phased in will have been included in the proposal to the donor. The Coordinator should review the proposal section on staffing and on the sequence of activities. If possible, make a preliminary list of tasks and number of working hours for each activity. The list can be revised later, but it will help at this point in determining the number of staff and technical resource people. Job descriptions can be written on the basis of this information and used during recruitment of staff to discuss what is expected of them and what they might expect from the work.

This project design also includes a full-time clerk/typist and a part-time bookkeeper. The bookkeeper may only be needed two days a month –whatever time is needed to ensure accurate, up-to-date financial records and reporting. Poor accounting procedures have harmed many projects, and is one of the primary reasons given for business failure. This can be avoided with proper attention.

Rapport between the Coordinator and staff members is established at the point of hire and should be nurtured throughout the project at regular staff meetings and individual discussions. The work will be difficult for everyone and mutual support and trust essential among village workers, technical advisors, volunteers and administrative staff et. al.

oo

Exercise

Prepare two job descriptions, including:

- Job title
- To whom is person in accountable
- What are the responsibilities
- List of job tasks
- Brief description of qualifications, compensation and benefits.

oo

3. Prepare staff orientation and training

Orientation should be a planned activity with time reserved to brief everyone involved with the project (including technical advisors). Several orientations will be necessary since all staff will not begin at the same time. Background reading would include the Project Plan, the proposal, and any reports produced up to the time of the briefing. Staff should be made familiar with the names of people and organizations linked with the project, the methods used, policies and procedures, and other pertinent information.

During the life of the project, specific training needs may be identified; training programmes should be prepared by the project, or staff members should be sent for training to community training programmes that fit the identified needs. For example, if the need is for communication tools for work with the villagers, the project might request the assistance of a technical advisor to train the staff; if the need is for training in start-up of small businesses for staff and participants, the project might arrange to send trainees to an established training programme close by. Technical advisors and technologies should be sought from among local or national resources. As cooperation among women and women's projects increases, so will the sharing of experiences and technologies.

B. Administering the Project Plan

There are some critical areas of project management that can make the difference between achieving or not achieving project goals. An overriding factor is the sharing of ideas and labor, among the staff and with the community.

To administer the project plan it is necessary to:

1. Establish policies and procedures.
2. Develop public awareness and collaboration.
3. Monitor project activities.

1. Establish policies and procedures

Policies and procedures are not the same as rules and regulations. They require thought and are subject to change. They are helpful because they give consistency to decisions and a framework for the plan of action. They should be developed by the project to reflect local and not imported culture. For example, each staff member will be operating on her own with the community. If such things as the method of working with the project participants, types of technologies to be used, channels of communication with official agencies and the press, and such other things as reimbursable expenses (to name a few) are decided on beforehand, there will be less confusion in operations.

Procedures can also be pre-decided concerning internal communications, reports, salary, benefits, etc.

The policies and procedures should be in writing –short and simple, revised as called for, transmitted to all concerned, and controlled. (See Part One, Chapter I, Section A.)

2. Develop public awareness and collaboration

First, review the list of all the people in the community who helped in the pre-planning stage of the project. These people, and the wider community, if advisable, should be made aware of the start of the project and its plan of action. This can be done at a community meeting, through a circular, or in group-by-group contact.

The value of this is:

- To show appreciation for the support to date;
- To begin the process of influencing the environment to accept the ideas of the project, e.g., self-employment, particularly for women; and
- To encourage future cooperation and involvement.

The Coordinator has the principal responsibility to maintain contact with officials and groups of the community. This can be time-consuming. It will help to have a clear idea of who will be contacted, about what, and when, but some creativity and spontaneity in developing cooperative links should remain. For example, as the project progresses and is known in the community, it may be asked to cooperate with other activities; or the project may open up some interest on the part of the banking community in making capital available to a group of the small businesses generated by the project.

This area of activity should not only help you in implementation, but in determining the direction to be taken at the end of the project period.

3. Monitor project activities

You will want to keep a close watch on how well you are keeping to the design-time-cost of the project. All staff members have a role to play in doing this. The coordinator has the final responsibility. The staff meetings mentioned earlier are the occasion of reviewing the tasks that were and are to be accomplished. In addition, times should be set for periodic monitoring of reports that include the following categories of information:

Sample Formats

Monitoring project activities

Date: From _____ to _____

<i>Check list of items</i>	<i>Date set for completion</i>	<i>Status</i>	<i>Action needed</i>
----------------------------	--------------------------------	---------------	----------------------

Monitoring project financial activities

Date: From _____ to _____

<i>Budget item</i>	<i>Amount received to date</i>		<i>Amount expended</i>		
	<i>Source</i>	<i>Amount</i>	<i>In reporting period</i>	<i>Total to date from beginning of project</i>	<i>Balance</i>

Monitoring is necessary to the life of the project because:

- You will want to catch any problems or gaps before they go beyond correction.
- You will be able to identify what can be changed and improved as you go along.
- You will have specific data to provide donor sponsoring organization and advisory group who will want to know your progress; and
- You will have important information for the final evaluation.

A good idea is to make a list of key people who should receive copies of materials produced by the project. This would include period progress reports. They need not be long, but they can be of great help in keeping the project visible. (See Part One, Chapter III, Section A.)

C. Evaluation of Project

The distinction and connection between monitoring and evaluation have been made throughout the GUIDELINES. In summary: Monitoring is periodic assessment of whether the work plan is “on-design, on-time, on-cost”, so that appropriate corrective action can be taken along the way and this information fed into evaluating the project.

Evaluation is a final assessment of the change resulting from the project: Has the quality of life for women and their families improved?

The two steps in the evaluation process are:

1. Review the purpose and the criteria of evaluation.
2. Implement the evaluation plan.

1. Review the purpose and the criteria of evaluation

Each donor agency will have its own guidelines for evaluation. These should be clearly understood and agreed upon at the start of the project, and again when evaluation takes place.

Recently there have been many conflicting views on evaluation –why is it needed, for whom is it made, by whom is it done, and how is it carried out?

Briefly, the prevailing view among policy makers and many donor agencies is that evaluations should be conducted by professionals who are not connected with the project, in an academic context, and within criteria set by donors. Usually the criteria are defined in quantitative terms: how many? how often? increases? decreases? at what cost? Designing this type of evaluation is often complicated; more often than not it has “western cultural biases” in determining effectiveness; and it can often require extensive pre-project data for comparisons, at considerable expense in time, money, and expertise.

The growing view among agencies/organizations in development work is that there is a need to simplify both the terminology and the methods of evaluation and that the people who designed and are benefitting from the project should participate in the evaluation. Therefore, self-evaluation or a combination of project and non-project involvement is beginning to take place.

In the discussion on “Designing the Project” it was stressed that the development and immediate objectives written at that point would be used in measuring the results of the project. To help with determining appropriate objectives, a draft plan of evaluation should be developed at the start of the project.

To develop the evaluation plan, identify the simplest and most appropriate methods for the “self-evaluation” referred to above and, working with the donor, adapt them to your situation. Some international agencies, donors, and policy makers are working on new indicators for measuring results of projects.³⁰ Interesting and difficult questions are under consideration, for example:

³⁰For example, United Nations Development Programme, Voluntary Fund for the United Nations Decade for Women, UN Asian & Pacific Center for Women and Development (see *Manual on Project Development*, 1979).

- How can we measure attitudinal change through evidence of behavior change?
- What behavioral changes should we look for?
- How can they be measured (quantified)?
- What benefits resulted for women besides those related to specific project objectives or those that can be measured?
- How can we reach the women (and, if there is time, the men) for their views on the value of the project?
- How should these views be used in evaluating the project?

2. Implement the evaluation plan

Some of the interview and observation steps recommended by evaluation advisers are:

- Develop points to be covered in the interview
- Select and train interviewers (members of the staff and the community)
- Identify people to be interviewed
- Summarize findings and use in overall report.

These or similar methods would be used along the various stages of information gathering during the evaluation process.

The information gathered before the project and in the middle and final monitoring periods should be reviewed and discussed by the evaluation team. The data should be organized into the categories of the criteria areas³¹ established in the objectives. Compare the various categories of data at the beginning with the same categories at the end of the project. Analyze what changes have taken place. Were the objectives met? What innovative changes were introduced that had not been part of the project plan? What do the data indicate as necessary new directions, strategies, operation, to make the project more effective in the future? What, in general, have we learned that can be shared with others about advancing the status of women and the community through development planning?

The information in the Evaluation Report can be of value to donors and policy makers not only in their cost-benefits analyses, but in making broader decisions for improvements in setting funding objectives, priorities, and strategies.

It should be viewed by the women at the local level not as a threat, but as a way of communicating what they have learned, what their needs are, and what they expect in the future.

³¹Example: Categories suggested by APCWD are: economic, social/attitudinal, organizational/participatory, and operational.

Exercise

FINAL REVIEW

CHECK LIST FOR DEVELOPMENT PROJECTS – IF INTEGRATION OF WOMEN IN DEVELOPMENT IS AN OBJECTIVE

PROJECT OBJECTIVES

- What are the objectives of the project?
- Are women specifically mentioned as either agents or beneficiaries?
- What, if any, are stated benefits for women? e.g.:
 - acquisition of skills
 - increased productivity
 - reduced workload
 - opportunity to earn cash income, etc.
- What assumptions are made in believing that project inputs will lead to these benefits?
- If women are not specifically mentioned as participants, would their actions be relevant to the objectives of the project? Would a component for women be a useful addition to the project?

AVAILABILITY OF BASIC INFORMATION

- What socio-economic information is already available which is relevant to the target group in general and women in particular?
- Is information on economic arrangements at household level, including role of women, adequate for purposes of project? e.g.:
 - structure and size of households, and developmental cycle
 - division by sex/age of labour, decision making, rights to land control over saleable products, etc.
 - sources of cash incomes, including off-farm activities, of household members
 - seasonality of labour demands, etc.
- If more information is essential, what arrangements are being made to obtain it?
- If consultants are assisting with feasibility studies, have they been briefed to consider situation and contribution of women, as appropriate?

PROJECT DESIGN AND PREPARATION

- Has there been consultation with people whose lives will be affected by project, and what attention has been given to women in this?
- Are women involved at any level in the professional planning and implementation of this project?
- Are women to be given access to the new opportunities and services which the project provides? e.g.:
 - local training and overseas fellowships
 - agricultural extension
 - new allocation of land rights

- credit arrangements
- membership of co-operatives
- employment during either structural or operational phase, etc.
- If not, what is the reason?
- Are resources adequate to provide these services for women? E.g.: Are women extension staff available in sufficient numbers if approach by male staff is not culturally acceptable?
- If project is likely to have adverse effects for women (see below) what actions are planned to counter-balance this?

ANTICIPATED IMPACT

- i. *How will project affect women's access to economic assets and cash incomes?*
 - Will they lose any of the following?
 - access to land
 - opportunity for paid employment or other income-earning activity
 - assistance with economic activities from other members of household
 - control over sale of product, etc.
 - Are any gains expected other than those stated in Objectives (see above)?
- ii. *How will project affect women's allocation of time?*
 - Will their workload increase/decrease as a result of innovation or changes? e.g.
 - mechanisation
 - new agricultural inputs and cropping patterns
 - withdrawals of labor by other household members
 - agricultural advice, nutritional or health teaching, if implemented
 - changes in distance to farms, workplaces, water supply, firewood supply, etc.
 - If workload is decreased, does this involve loss of income for women?
- iii. *How will project affect subsistence within the target group, and women's control over food supplies for household?*
 - Will promotion of commercial agriculture affect
 - availability of land for food grown mainly for use
 - women's access to land
 - labor inputs (male and female) on food crops, etc.
 - Will any sources of food be removed or decreased?
 - Will women be increasingly dependent on partner's cash income for household food and necessities? If so, will this income be sufficient to make good subsistence losses? How subject is it to fluctuations according to world market, climatic conditions, etc. Can it be assumed that male income will "trickle down" sufficiently to meet basic household needs?
 - Will there be a change in staple diet? Will this be acceptable? Will it involve increased time in preparation?
 - Will changes in labor allocation alter nutritional needs of any members of household? Are subsistence resources or increased cash incomes sufficient to meet them? If not, what are probable consequences for women and children, especially if unequal food distribution patterns are customary?

- iv. *Is the project likely to have any adverse consequences for women within groups and categories not immediately affected?*

EVALUATION

- Is provision being made to monitor and evaluate the impact of the project on women?
- Will available baseline data be adequate for this purpose?
- What factual indicators would be relevant?

By Dr. Therese Spens
Ministry of Overseas Development
LONDON, ENGLAND

Appendix A

SUGGESTED READING MATERIAL^a

Observing the Situation of Women and of Development Activities

- ANTROBUS, Peggy, *Analysis and Critique of Development vis-à-vis Women*, Paper presented at the 15th World Conference of the Society for International Development, Amsterdam, November 28 – December 3, 1976.
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- COMISION ECONOMICA PARA AMERICA LATINA (CEPAL), *Regional Plan of Action for the Integration of Women into Latin American Economic and Social Development*, Santiago de Chile, CEPAL, E/CEPAL/G.1042/Rev.1, November 1977.
- COMISION ECONOMICA PARA AMERICA LATINA (CEPAL), *Strategy for Caribbean Countries During the Third Development Decade*, Bridgetown, Barbados, CEPAL, E/CEPAL/CDCC/61, May 27, 1980.
- ECONOMIC COMMISSION FOR AFRICA (ECA), *The New International Economic Order – What Roles for Women?* Addis Ababa, Ethiopia, ECA, E/CN.14/ATCRW/77/WD.3, 1977.
- ECONOMIC COMMISSION FOR AFRICA/AFRICAN TRAINING AND RESEARCH CENTRE FOR WOMEN (ECA/ATRCW), *National, Subregional and Regional Machineries for Women in Development: Report and Directory*, Addis Ababa, Ethiopia, ECA/ATRCW, E/CN.14/ATRCW/79/W.D.Z., 1979.
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- INTERNATIONAL CENTER FOR RESEARCH ON WOMEN (ICRW), *The Productivity of Women in Developing Countries: Measurement Issues and Recommendations*, Washington, D.C., Office of Women in Development (PPC/WID), Agency for International Development, 1980.
- MAIR, Lucille M., *New International Economic Order: What Does Development Really Mean to Women?*, International Foundation for Development Alternatives, January-February 1981.
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- MC CAFFREY, Kathleen M., *Images of Women in the Literatures of Selected Developing Countries (Ghana, Senegal, Haiti, Jamaica)*, Prepared by Pacific Consultants for the Office of Women in Development (PPC/WID), Agency for International Development, n.d.
- PALMER, Ingrid, *The Nemow Case. Case Studies of the Impact of Large Scale Development Projects on Women: A Series for Planners*, Population Council International Programmes Working Paper No. 7, New York, Population Council, 1979.
- RIHANI, May, *Development As If Women Mattered: An Annotated Bibliography with a Third World Focus*, Occasional Paper No. 10, Washington, D.C., Overseas Development Council, 1978.
- UNITED NATIONS DEVELOPMENT PROGRAMME (UNDP), *Rural Women's Participation in Development*, Evaluation Study No. 3, New York, UNDP, June 1980.
- UNITED NATIONS INTERNATIONAL CHILDREN'S FUND (UNICEF), *Women, Children and Development*, UNICEF's Report to its Executive Board, E/ICEF/L.1409.
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- ALLMAN, James and John May, *Fertility, Migration and Family Planning in Haiti*, *Population Studies*, Vol. 33:3, 1979.
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Useful Addresses

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Appendix B

THE IMPERTINENT PERT CHART

The term PERT –for Programme Evaluation and Review Technique– is commonly used among planners. It tells *when* things will be started and completed, *by whom* and *for whom*, in what sequence and with what effects. It can be used as a tool to *plan* any aspect or phase of a project or programme.

A PERT Chart may seem complicated: a maze of arrows, connecting lines, boxes, labels, time concepts, and sequential relationships. Some people feel that PERT charts are beyond them. . . not just their planning, but their reading as well.

Every angle must be explored, each action must be given its time value, cause-effect relationships must be anticipated, and all resources must be charted.

Staff at various levels should be involved in the process of planning a project or programme.

World Education has developed the “Impertinent PERT Chart” (IPC) as a planning tool. This is based on the original PERT Chart but is more flexible, has a simpler structure and is easy enough for anyone to prepare with a minimum of cost and time.

Before a step by step blueprint of a plan for any project/programme can be developed, a good deal of hard-headed thinking must be done and basic questions asked. Breaking tasks to be done into categories and then into small and simple units also helps.

1. *Activities*
 - (a) What are the objectives of the project/programme?
 - (b) What activities will be carried out to achieve these objectives?
 - (c) What are the objectives of each activity?
2. *Resources*
 - (a) What resources are needed for each activity?
 - (b) How do you intend to get at these resources?
3. *Administrative Tasks*
 - (a) What tasks need to be done before each activity can be carried out?
 - (b) Who will take responsibility for each task?
4. *Evaluation*
 - (a) *Monitoring Plans*
 - (i) Was enough time allocated for each activity?

- (ii) Were resources adequate?
- (iii) Is there need to change immediate objectives or plans?
- (b) *Assessing whether objectives have been achieved*
Decide on indicators by which you will judge whether objectives have been achieved.
 - (i) Is there a higher level of participation?
 - (ii) Has there been a change in behaviour/attitude?
 - (iii) Is there an increased awareness?
 - (iv) Has there been an increase in production e.g., have more vegetables been grown, more chairs built, etc.?
- (c) *Keeping records and writing reports*
 - (i) What kind of records are to be kept?
 - (ii) What kind of reports are needed?
 - (iii) How often should (i) and (ii) be done?

HOW TO DEVELOP AN IMPERTINENT PERT CHART

1. Decide on priorities/action areas/headings connected with the task or activity, e.g., resources, administrative tasks, monitoring evaluation.
2. Divide paper (across) horizontally into sections according to headings decided upon, write headings down the left hand side.
3. Take a large piece of paper or bristol board, divide it vertically into time periods, e.g., days, weeks, months.
4. Write units of time at the top of each section.

T I M E :			
	January	February	March
Project/Programme Activity	Meeting to plan	One-day workshop	
Resources Needs	Identifying and contact resource persons		
Administrative Tasks	Send out invitations		
Monitoring and Evaluation	Develop evaluation sheets		

5. Take several small slips of paper. On each paper, write an activity that has to be done in order to complete the task/programme.
6. Use masking tape or thumb tacks to place each 'action paper' on the planning board at the time the action ought to be carried out.
7. Make changes which help the plan flow in sequence, allowing adequate time to complete actions which depend on each other.

When the I.P.C. is ready, it should be discussed with members of staff and/or other persons who are to be involved in planning and implementing the programme/project. It will reflect at a glance, the logical steps by which activities in a project or programme will take place.

Adapted from:

The Impertinent PERT Chart

By:

Lyra Srinivasam for World Education

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