



# Participatory Analysis for Community Action (PACA) Training Manual

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**PARTICIPATORY ANALYSIS FOR  
COMMUNITY ACTION (PACA)  
TRAINING MANUAL  
(REVISED 2007)**



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This manual is a revision of the 1996 *PACA: Participatory Analysis for Community Action* [ICE No. M0053] and *Gender and Development Training* [ICE No. M0054]. The development of these materials was partially funded through the Peace Corps' Women's Organization and Participation PASA (Participating Agency Service Agreement) with the Women In Development Office of the U.S. Agency for International Development.

The materials developed and adapted for use in the *Gender and Development Training Manual* came from many sources, people, and experiences.

Special acknowledgment goes to Barbara Thomas-Slayter, Andrea Lee Esser, and M. Dale Shields of Clark University's ECOGEN Research project which produced *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management*. This was an invaluable resource in the development of PACA. Thanks also goes to the staff of the GENESYS Project for workshops on gender and models of different types of analytical tools.

Thanks are extended to the International Centre for Research in Agroforestry (Nairobi, Kenya), Kumarian Press, Inc. (West Hartford, Connecticut), and UNIFEM (New York, New York) for permission to include excerpts from their publications in the manual.

The Peace Corps staff, Volunteers, and local counterparts contributed to modifications of the PACA materials and field insights in their uses at posts worldwide in all sectors. Additional insights were added by specialists at Peace Corps headquarters in Washington, DC.

Trainers should be aware that the *PACA Idea Book* [ICE No. M0086] was published in the fall of 2005 and is a practical resource designed for use in the field by Volunteers. It is an excellent tool for Volunteers to use as a guide once they have received the initial training in PACA tools and methodology that the *PACA Training Manual* provides.

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# INTRODUCTION

## BACKGROUND: THE PEACE CORPS' COMMITMENT TO WOMEN

In 1974, the Peace Corps Act of 1961 was amended to include the Percy Amendment which states: "In recognition of the fact that women in developing countries play a significant role in the economic production, family support, and overall development process, the Peace Corps shall be administered so as to give particular attention to those programs, projects, and activities which tend to integrate women into the national economies of developing countries, thus improving their status and assisting in the overall development effort."

The Peace Corps Women in Development (WID) Office was established in 1975 to ensure that the agency meets the mandate of the Percy Amendment by integrating women into the economic, political, and social development of their own communities and countries through Peace Corps projects and training programs. The women in development coordinator is charged with supporting these efforts by providing technical advice to staff and Volunteers on how women's needs can be determined and addressed in the Peace Corps' development activities.

Initially, women in development Volunteers developed separate women's projects. In the 1990s, there was a philosophical and programming shift by WID specialists and the international development community away from separate women's projects, which generally were thought to serve to marginalize women further. Efforts now center on integrated projects which include both women and men and address their different roles, rights, responsibilities, and priorities.

The philosophical basis of this broader approach has several components:

- First, effective, sustainable development interventions will only occur when the needs and priorities of all community members are taken into account;
- Second, the integration of women into the systematic examination of those needs and priorities will lead to the identification of opportunities in project design and implementation which will strengthen projects and their overall impact;
- Third, this systematic incorporation of women will further the goal of institutionalizing the agency's commitment to the letter and spirit of the Percy Amendment; and,
- Finally, the inclusion of women from the situational analysis stage through evaluation will bring women into Peace Corps activities as full participants, rather than as helpless victims or passive beneficiaries.

To institutionalize this more inclusive philosophy, the WID Office developed a broad plan which includes training of Volunteers, staff, and host country counterparts, and development and acquisition of resource materials which provide the gender-sensitive tools for situational/needs analysis and project implementation, thus insuring that women's priorities will not be ignored simply because they have been invisible.

Specific initiatives and training tools to implement this broader gender and development (GAD) approach began in 1994 when the Peace Corps received a Participating Agency Service Agreement (PASA) grant for Women's Organization and Participation from the U.S. Agency for International Development (USAID). This grant provided funds for two related spheres of activities. The Gender and Development Training Initiative sought to institutionalize the consideration of gender issues throughout the Peace Corps by developing training programs and materials for all levels of the Peace Corps staff, trainees, Volunteers, and their counterparts. The Girls' Education Initiative sought to raise the awareness of the issues of girls' education within existing Peace Corps education programs and among staff, Volunteers, and host country counterparts; to increase the number of Peace Corps education projects which specifically addressed the issue of girls' education and its concomitant problems; and, to integrate girls' education themes into other sectors which had a direct bearing on the issue, including health, environment, youth development, and business development.

## DEVELOPMENT OF MATERIALS

At the International Women in Agriculture workshop held in Ecuador in 1994, gender and participatory rural appraisal (PRA) specialists introduced the major elements that have been refined into the Peace Corps' gender and development materials, including participatory analysis for community action (PACA) philosophy and tools. Associate Peace Corps directors (APCDs) were introduced to farming system theory, and they applied PRA tools that were modified to be gender-sensitive.

As Peace Corps Volunteers generally work at the community level, the household as a system is a basic unit for gender analysis. Households function in culturally determined ways, with different roles, rights, and responsibilities for men and women, boys and girls. In addition to their **structure**, households have various **resources**, including time, land, income, knowledge, and **needs** for food, shelter, education, and health, to name a few. Resources are allocated along gender lines, as are the responsibilities for providing for needs. The gender information framework is a data analysis tool for households.

Households function in ever larger contexts, including small groups, communities, and institutional, legal, political and economic systems, as well as within cultural norms. The contextual analysis model assists in visualizing these levels.

Always a focal point of the agency's activities has been a commitment to working with local counterparts and community members to meet their priorities and work together to solve their problems. The objective has always been to achieve a **partnership** in which the Peace Corps Volunteer and the community members **together** analyze their situation and work with community members to meet their needs. The constant challenge has been to engage these partners in a process in which all voices within the community are participants in the analysis, design, implementation, and monitoring and evaluation of their joint activities and projects. The purpose has been to have projects and programs which are shaped in a participatory process, with voices of the stakeholders themselves shaping the development process itself.

Participatory analysis for community action (PACA) was developed to provide a set of gender-sensitive tools which could facilitate the implementation of this participatory development approach. It grew out of the many requests for materials which could address, simultaneously, the needs for tools to use in community development, urban and rural appraisal, gender and socioeconomic analysis, and other participatory methodologies. These materials, for the most part, are gender-sensitive adaptations of tools which have been used in PRA and rapid rural appraisal for many years.

However, PACA is not only about analysis and it is not about a development worker extracting information from a community to create her or his own idea of a project. Rather it is about building a partnership between the development worker and the community members, whether they are farmers, English students, extension agents, a mothers' club, or a credit union membership. In the process of the joint development of information, analysis of its implications for the community, and planning for action, the community members and the Volunteer work together to ensure that the voices of women and men, girls and boys, are included in deciding how they will commit their most precious resources: their time, their energy, and their common future.

## **PUBLICATIONS DEVELOPED AS A RESULT OF THE GAD INITIATIVE**

The *PACA: Participatory Analysis for Community Action* [ICE No. M0053] was first published by ICE in 1996. In late 1997, a compilation of PACA and girls' education materials were produced for the completion of the Women's Organization and Participation grant [ICE No. M0054].

In February 2000, the first Idea Book was published. The title *Beyond the Classroom: Empowering Girls* [ICE No. M0080] indicates the content: mentoring, clubs, camps, sports, contests, and other activities and events to help girls gain self-esteem and maintain their interest in school. The Idea Book series is intended for Volunteer use. The small books are full of sample activities and "how to's" that Volunteers can refer to as opportunities arise and the wants and needs are demonstrated by their community members.

A second Idea Book focusing on girls, *In the Classroom: Empowering Girls* [ICE No. M0083], was published in March 2002. This booklet includes a holistic approach to girls' education, creating a girl-friendly environment, classroom and curriculum-related activities, co-curricular activities, and awards, incentives, and scholarships.

In the fall of 2005, the *PACA Idea Book* [ICE No. M0086], was published. Distinguished from the *PACA Training Manual* in that it does not contain session plans but rather explains how and why PACA is used, it provides examples of its uses in all sectors, and shows how its use leads to next steps, such as other participatory analysis or small or large projects with schools, clubs, organizations, or communities. Steps and examples for using each PACA tool, ways to practice and gain confidence, and other types of gender-sensitive tools are included.

This volume, the revised *PACA: Participatory Analysis for Community Action Training Manual* [ICE No. M0053] will continue to be a resource for trainers and for Volunteers and counterparts who train others in the gender-sensitive, participatory techniques.

## **HOW TO USE THIS MANUAL**

### **ORGANIZATION AND CONTENT**

There are six sections in the manual. They provide basic information on gender and development; participatory approaches; basic skills Volunteers need to conduct the participatory tools; skills development in four participatory tools; how to work with communities for training purposes; and moving from analysis into projects.

## OVERVIEW OF THE SECTIONS

### SECTION 1: UNDERSTANDING ALL THE PEOPLE IN DEVELOPMENT

These session plans provide basic knowledge about women in development, gender and development, and participatory analysis for community action (PACA). There is a session on the systems approach to development and skills training for contextual analysis.

### SECTION 2: USING PARTICIPATORY APPROACHES

Sessions in this section introduce the idea of participatory approaches in experiential ways.

### SECTION 3: BASIC SKILLS

Fundamental to learning about others and building relationships are good skills in observation, interviewing, and facilitation. GAD and PACA methodologies cannot be carried out without them. In new cultural settings, old skills need to be revisited, cultural assumptions challenged, and new culturally appropriate language and behaviors learned. The three session plans that teach skills in these areas are designed to be modified to fit each culture's practices and norms.

### SECTION 4: PACA TOOLS

Four session plans provide classroom practice prior to community work for daily activities, community mapping, seasonal calendars, and needs assessment with priority ranking.

### SECTION 5: COMMUNITY FIELD WORK WITH PACA

Though practice with participatory processes in communities is essential to understanding the power of the process and the skills needed to carry it out, there are many ethical concerns with using communities for training purposes. One session plan addresses the selection and preparation of communities as well as the preparation of the training participants for the community experience. Another provides a detailed debriefing for the training participants to maximize their learning from the experience.

### SECTION 6: MOVING INTO PROJECTS

This section contains background reading, a livelihood exercise, exploring a range of activities to meet a stated need, and several different applications and action planning sessions.

### APPENDICES:

- I. Development of PACA: A Timeline of Events
- II. Adaptation of Niger's *PACA Training Handbook*
- III. Three Tools for Introducing the *PACA Idea Book*

## RELATION BETWEEN THIS MANUAL AND THE PACA IDEA BOOK

The *PACA Idea Book* was developed so that Volunteers would have a reference to the importance of participatory methods for building sustainable development with their communities; how such methods can lead to new knowledge in their project participants which will lead to better projects; how to practice and build the skills they need to use participatory methods; how to conduct the PACA tools; and how to use other methods in gender-sensitive ways. Volunteers in all sectors will find relevant

examples of the use of participatory tools. It is suggested that the *PACA Idea Book* be introduced through the PACA training sessions included in this manual that refer to relevant sections of the *Idea Book*. In addition, three other tools introduce the *PACA Idea Book* to staff, Volunteers, and counterparts in Appendix III.

## INTEGRATING PACA WITH OTHER TOPICS IN PRE-SERVICE TRAINING

**Development.** The sessions in Section 1: “Understanding All the People in Development” and Section 2: “Using Participatory Approaches” provide basic knowledge and frameworks that should be included in an introduction to the Peace Corps and development. The *PACA Idea Book* [ICE No. M0086] can be introduced to trainees at the same time. Chapter 1: “The Peace Corps’ Approach to Development” is a good overview of capacity building and sustainable development. It also describes PACA and why it was developed, and shows the gender connection.

*The Roles of the Volunteer in Development* [ICE No. T0005] provides a good introductory chapter Volunteers can read to see how they will discover the appropriate roles they will play in their projects as they work in participatory ways toward sustainable development.

The PACA tools can be taught during pre-service training in various formats: using the tools to gain information about their own needs and interests during training, and observation of these tools being used in school, community, and organizations by more experienced Volunteers and their counterparts.

Another resource that can be integrated is the Peace Corps Digitized Training Resources video collection on CD-ROM, Volume 1 and Volume 2 [ICE No. RE042]. This collection of digitized videos includes the Food and Agriculture Organization’s video *Gender Analysis and Forestry Projects: Why?, The Water of Ayole*, and the *Road to Lamesen*.

**Language/Cross-cultural.** Being able to use PACA requires skills in observation, interviewing, and facilitation, as well as skills in the local language. All of these skills are fraught with cross-cultural implications. The sessions in Section 3: “Basic Skills” can be integrated with development, cross-cultural, and language sessions. The sessions in Section 5: “Community Field Work with PACA” help trainers prepare communities and trainees for field experiences. Related materials for trainees are in the *PACA Idea Book* chapter 4: “Preparing for PACA,” and in Toolkit One: The Learner of *The Roles of the Volunteer in Development*.

Other related general resources for pre-service training include:

*Culture Matters* [ICE No. T0087]

*Volunteer’s Guide to Community Entry, A: Learning Local Environmental Knowledge* [ICE No. M0071]

Trainees are guided how to learn local beliefs and relationships between the people and their environment. Information is gained primarily through observation and interviews.

*Nonformal Education Manual* [ICE No. M0042]

As all Volunteers tend to play the roles of teachers, trainers, or facilitators in one way or another, introducing NFE during pre-service training and relating it to the skills being taught with PACA is a natural fit.

See the *PACA Idea Book*, pages 77-78, for ways PACA has been integrated in pre-service training in various posts. Appendix II in this manual is an excerpt of a PACA training manual from Niger which gives outlines of sessions and sequence for pre-service training and later work at Volunteers’ sites.

# INTEGRATION OF PACA WITH OTHER TOPICS IN IN-SERVICE TRAINING

**Project Design and Management (PDM)** workshops are key events when PACA techniques are used for situational analysis. Volunteers and their counterparts may be assigned one or more PACA tool to use with their target audience in preparation for the PDM workshop. Key relevant resources, in addition to the *PACA Idea Book*, are *The New Project Design and Management Training Manual* [ICE No. T0107] with the training sessions and the *SPA Idea Book* [ICE No. M0082], a Volunteer publication that takes them through the process of planning, managing, and evaluating local community projects.

## EDUCATION

*Nonformal Education Manual* [ICE No. M0042]

*Community Content-Based Instruction (CCBI) Trainers Manual* [ICE No. T0112] and  
*CCBI Volunteer Workbook* [ICE No. M0073]

## ENVIRONMENT

*Environmental Education in the Community* [ICE No. M0075]

## HEALTH

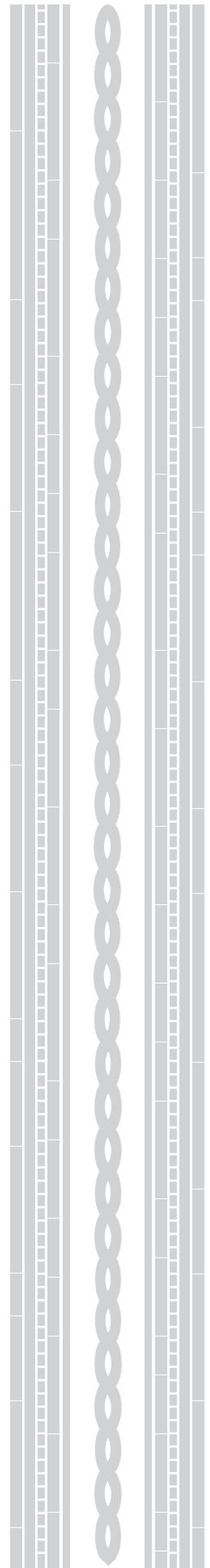
*Promoting Powerful People: A Process for Change* [ICE No. T0104]

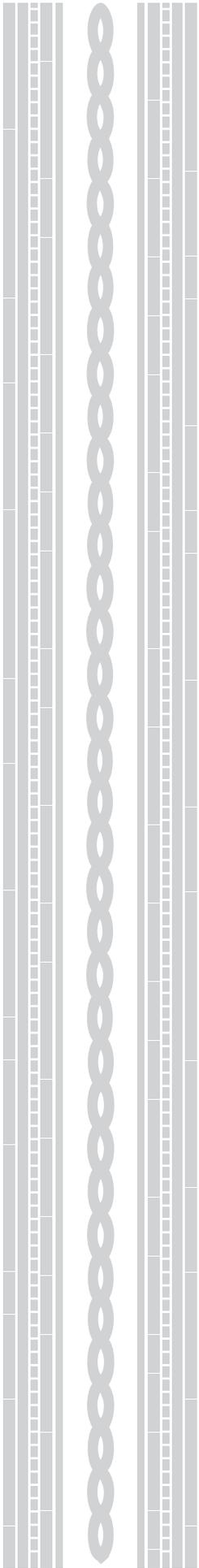
*A New Beginning: The Child Health Manual* [ICE No. T0102]

*HIV/AIDS Training Resource Kit* [ICE No. T0136K)

## YOUTH

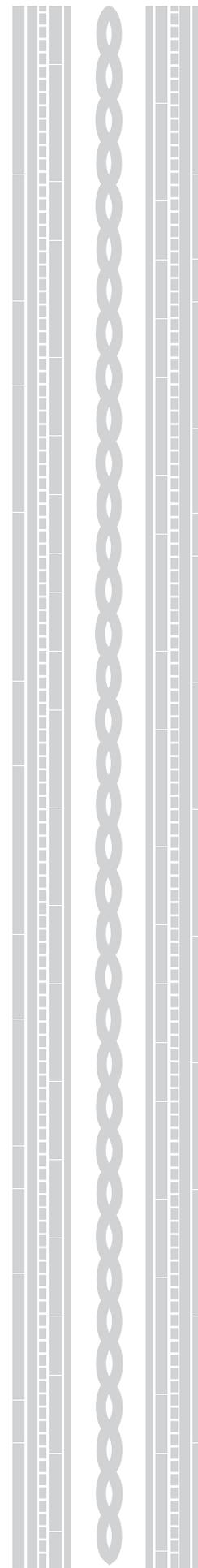
*Working with Youth: Approaches for Volunteers* [ICE No. M0067]

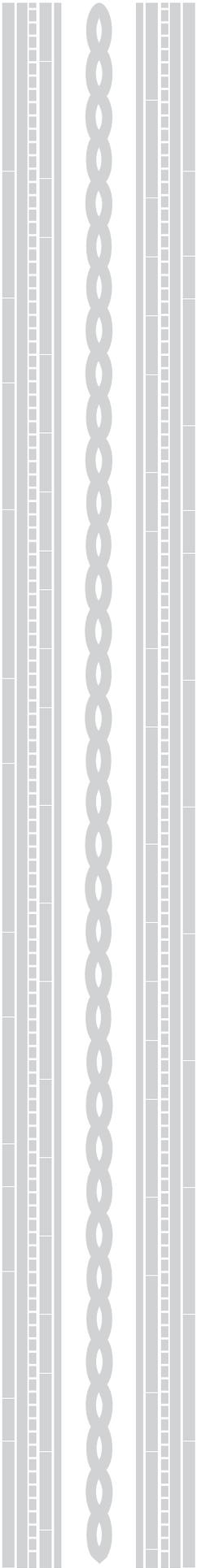




# **SECTION 1: UNDERSTANDING ALL THE PEOPLE IN DEVELOPMENT**

Six session plans provide basic knowledge about women in development (WID), gender and development (GAD), and participatory analysis for community action (PACA). In addition to an overview session, there is an introductory session on the systems approach to development, and skills training sessions for Contextual Analysis and the Gender Information Framework.





# WID, GAD, AND PACA

## RATIONALE

This session provides a basic understanding of the focus of women in development (WID), the development of gender and development (GAD), and how they relate to each other. It also provides definitions used in the Peace Corps, including the gender-sensitive participatory methodology called participatory analysis for community action (PACA).

## TIME



1/2 to 1 hour

## GOALS AND OBJECTIVES

### GOAL

To explore concepts of development, women in development, gender and development, and PACA.

### OBJECTIVES

1. To develop a common definition of development.
2. To clarify the distinctions between women in development and gender and development, sex and gender.
3. To define the key elements of the gender-sensitive participatory methodologies called PACA.

## TRAINER PREPARATION



1. If not thoroughly familiar with WID and GAD approaches, read the background reading “Gender and Development” at the end of the session. Keep in mind that the Peace Corps does not employ individual interviews when doing gender analysis of family structures. Focus groups are used. Study the vocabulary list.
2. Prepare flip charts.
3. Copy handouts.
4. Read session plan and provide examples from your own experience.

## MATERIALS



- Blank flip chart paper
- Marking pens
- Masking tape

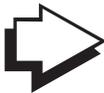
## HANDOUTS

- Background Reading: Gender and Development
- Gender and Development Vocabulary and Definitions
- Optional: Gender and Sex Development Approaches

## FLIP CHARTS

- Pendulum Model
- Development Approaches
- Gender and Sex

## PROCEDURE



### I. INTRODUCTION (1-5 minutes)

Explain the goals of the session.

### II. DEVELOPMENT APPROACHES (30-45 minutes)

- A. Recognize with the group that all participants come to this workshop with different development experiences. Begin by looking at some definitions of development. Ask:

What words or phrases does the word **DEVELOPMENT** bring to your mind?

On a blank flip chart, list words or phrases that participants suggest.

Definitions will probably include economic improvement, improvement in quality of life (health, housing, employment, opportunities, security, etc.).

Leave the definitions posted; mention you will come back to them.

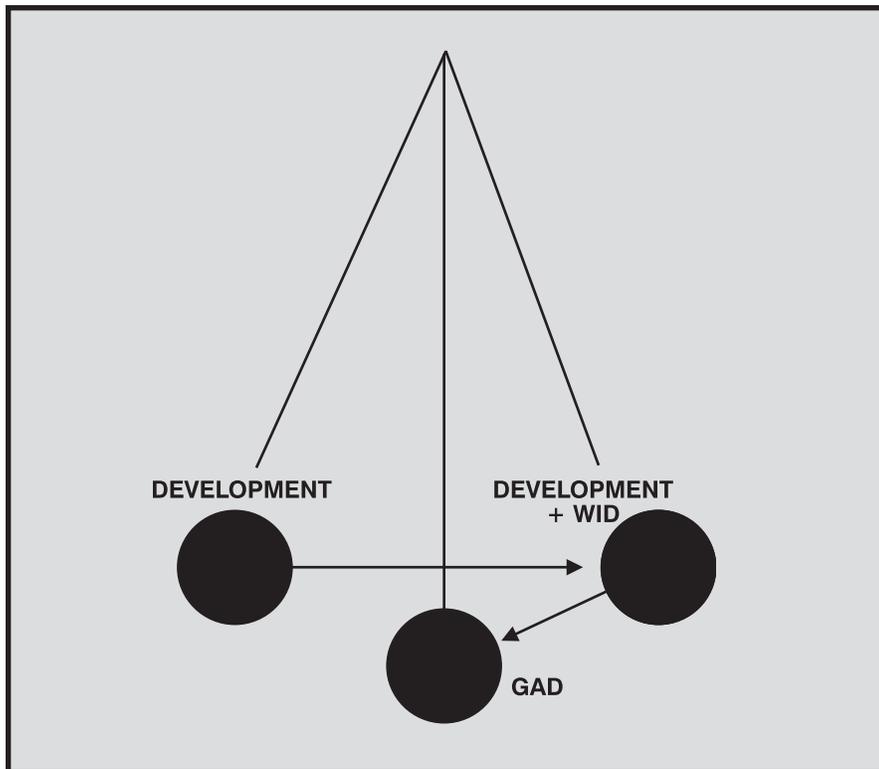
- B. Use pendulum model (on flip chart) to explain:

1. Original development approaches were generally designed by men who talked to men who worked with men. The projects were implemented by men who assumed that the projects would meet women's needs, too.

These often included "technological" packages, such as a new type of rice or another product, that had been developed at an experimental farm somewhere. It was introduced to farmers; they not only had to learn to work with the new product, but also to buy other required items, such as fertilizer, pesticides.

The theory was basically to look at a single way to increase income to poor (usually rural) people.

2. A reaction to this approach was to look at women as a separate group. This came about because women were often left out of development discussions, analysis, and resulting projects. Projects often either did not benefit women or, in some cases, actually left them worse off. The women in development movement ensured that women were recognized as important in the development process. Since women's needs and concerns had not been identified in the past, women were singled out, studied, and special funds were provided for "women's projects."



This approach developed excellent information on women's roles and needs but no relational data for how they compared to men. For example, women were found to work very long days, often 12-hour days. But how many hours did men work? And, just as importantly, what tasks did men and women each do? How did their work loads relate to each other, depend upon each other's, and each contribute to the family's well-being?

In fact, on this side of the pendulum swing, we still had traditional development approaches but we added women's projects; however, they were usually separate projects.

### C. Introduce Gender and Development:

1. Gender and development is an approach that looks at women as an integral part of the family, community, and larger society. Through various gender analysis techniques, the roles and rights of both women and men are studied in order to determine how development interventions may be made most effectively. As the Peace Corps usually works at the community level, the basic unit of analysis is the family.

By analyzing how the family system works within its cultural context, including the roles, rights, and responsibilities of both women and men, and boys and girls, projects can be designed to address the appropriate family members with some sense of how the project might impact the total family system.

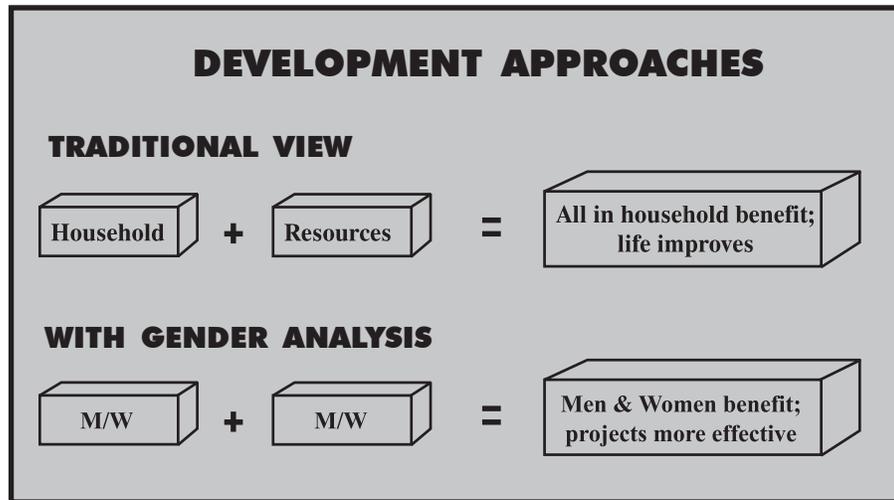
2. Using techniques called "gender analysis," the family system is studied in terms of:
  - access to and control over income from various sources;
  - access to and control over resources;
  - implications for educational levels;
  - implications for use of time; and
  - labor allocation.

For example, without knowing how money is earned and spent, it is hard to know what kind of additional income will benefit family members. There are different expenditure patterns for men and women. In general, men tend to use their income for agricultural/production inputs (fertilizer, pesticides, new machinery) and entertainment. Women tend to use money at their disposal for food, health care, and education. However, to be sure, the culturally defined patterns of access to and control over income from various sources in the families who are the beneficiaries of a development project must be analyzed.

3. The goal of this approach is effective and sustainable projects, because the project is designed for the specifics of the family structures. This type of development cannot be based on guesses, or old data. Everywhere in the world, families are changing: there are more female-headed households due to wars, out-migration for work, etc. Situations change, such as the return of Basotho men from the mines of South Africa: they now need to fit into the farming system in Lesotho previously run by the women in their absence.

**The focus of gender and development is sustainable development interventions, not equity issues.**

- D. Look at these approaches with another diagram and some examples (Use flip chart “Development Approaches”). Distribute optional handout “Development Approaches,” if used.



1. Traditionally, it was thought that if you add resources to a household, all in the household will benefit; life will improve for everyone. It is flawed to think that meeting the needs of one family member will automatically help all members.

**Example 1:**

*Trainer’s note: This example is one of two possible situations for an activity in the Introduction to a Systems Approach session plan. Do not use it here if you will use it later. Select another example for here.*

A good example is a Philippine rice project. The goal of this project was to improve the family income. To do this a new strain of rice was introduced which produced more rice per acre. It was accepted and grown, and after three years, a follow-up study showed that despite the fact the rice had been accepted, family income had gone down. On closer examination, it was discovered that the new rice had short stalks and so left less rice straw after harvesting. Harvesting took more time because there was more rice. The additional income from the rice did not make up for the loss of income from the women's mat and basketry making from rice straw. They had less straw to use, but also less time because it was their task to do post-harvesting tasks: removing the rice from the straw, etc., and they now had much more rice to work on.

### Example 2:

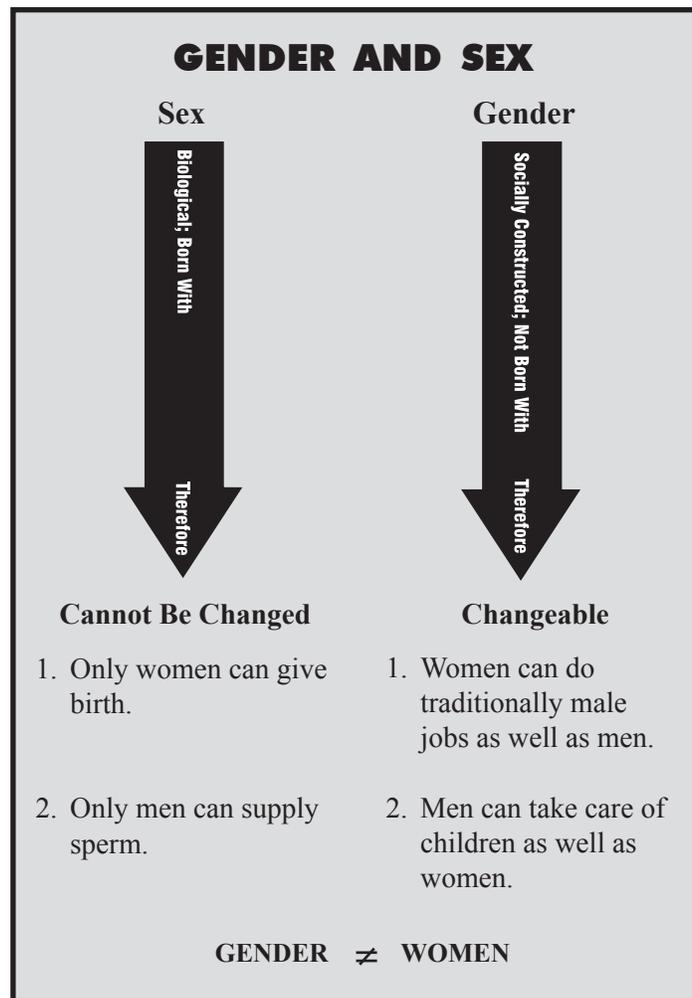
Volunteers and counterparts in a heifer project determined that family well-being would be improved by providing another cow to each family. Since the cows grazed for food, it was assumed that one more cow wouldn't adversely affect family expenses, and it would provide additional milk, milk products, or beef for income. However, the roles of family members were not taken into account in terms of the maintenance of the cows. The women were responsible for the milking, preparing milk products for sale, and for taking the cows to and from the pastures each day. An additional cow would add a significant amount of work to their daily schedule, severely limiting a caper and mushroom pickling project that had become a good income-generating activity. Without the women's input into the decision whether or not to receive another cow, the heifer project potentially could have met resistance, or if forced on them, adversely affected family income if the caper and mushroom project had to be abandoned.

2. Revisiting the traditional view of development towards family well-being, we know we need to find out the roles, rights, and responsibilities of the individual family members to be able to determine how a development project will impact the family as a whole, as well as the individuals within the family.

Gender analysis of family structures can be very invasive and inappropriate if carried out through individual interviews incorrectly. One way the Peace Corps has introduced this type of analysis is through participatory activities in which groups of men and women, boys and girls, describe aspects of their lives. By describing their daily activities, drawing maps of their communities, and developing seasonal calendars of all the tasks, social events, expenses, illnesses, and other aspects of their lives, it is possible to understand how the family units and the community function. These activities in focus groups are not as invasive as personal interviews which would be culturally inappropriate almost everywhere in the world. The participatory activities which are conducted in gender-sensitive ways are called participatory analysis for community action (PACA). We will learn more about those later.

### III. DEFINITIONS (10-15 minutes)

- A. Ask: How many of you have used the term "gender" before coming to this workshop? What does gender mean?
  1. Using the flip chart "Gender and Sex," clarify the difference between the terms sex and gender. Distribute optional handout "Gender and Sex," if using.



What are some examples of gender roles which you have seen men have in one place (or instance) and women in another?

- In some villages both men and women use machetes. But women are not allowed to cut the plants to thatch the roof; only men do that.
  - In some countries men are tailors, women are not. Women may do handwork, like knitting or crocheting, but they do not use sewing machines.
  - Others:
2. **Is changing gender roles what we are about?** No. What we want to do through gender analysis is **understand** who does what so that we can accurately gauge the impact of changes development projects may bring **and** so we can accurately target who needs what type of training. Gender roles change over time as families adjust to new pressures and opportunities. This may also occur as an unintended result of a project, but it is not the primary goal of a GAD approach.

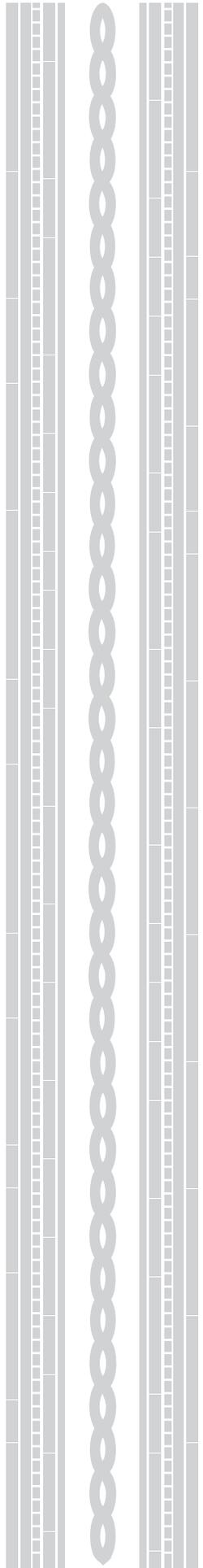
GAD philosophy is understanding the family system within its contexts. We will learn more about that in a session entitled “Introduction to a Systems Approach.”

3. Women in development offices and funding for girls' and women's activities remain critical because women and girls are still often left out of the development picture. WID coordinators and committees play the role of ensuring that women's needs and priorities are kept visible, that project reporting indicates in what ways women's and girls' needs are addressed, and that when funding for specific girls' or women's activities are needed, including those identified through a GAD approach, there are funds for them.

## V. SUMMARY (5 minutes)

Distribute "Gender and Development Vocabulary and Definitions" handout.

Review the definitions: development  
sex/gender  
WID/GAD/PACA



# GENDER AND DEVELOPMENT

Development is an investment in the future. The links between people and development efforts include food security and nutrition, energy, employment, income, health, education, and sustainable agriculture and natural resources. These links are especially vital to the rural and urban poor. It is increasingly recognized that the socioeconomic needs of these women and men must be a priority in any sustainable strategy to resolve development problems.

Increasingly, development policies have begun to move away from a strictly production and industrial sector focus towards a development approach which acknowledges the links between resources and people. Current efforts are designed to address the problems of urban and rural poverty, promoting local people as the *agents* as well as beneficiaries of development activities.

Planning for *people-centered* development requires more precise information about who the people are. They are not a homogeneous group. The people are comprised of women and men. The “poor” are poor women and poor men. The “children” are girls and boys. Everywhere, and within every socioeconomic group, the lives of women and men are structured in fundamentally different ways. A gender-based division of labor is universal; but it differs by culture, place, ethnic group, and class. Therefore, information is not precise enough for development project planning if it is not disaggregated by gender.

Increasingly, gender-disaggregated information is used in international aid development because of its importance, and because many development professionals now have access to the necessary information and training in gender analysis.

## THE IMPLICATIONS OF CONSIDERING GENDER IN DEVELOPMENT

Gender-disaggregated information reveals what women and men know, what they do, and what they need. Without such information, development efforts may not be appropriately designed, risking failure and negative impacts. Whether women, men, or both should be participants in specific development activities is a highly contextual question. The answer depends on the roles and priorities of the women and men within specific locations. Using gender analysis, development planners gain gender disaggregated information on factors affecting development which guides them to more sustainable and effective development.

Gender-disaggregated information is different from information collected by other methods for development planning because it uses the *individual person* as its unit of analysis. Therefore, it is more precise than other methods employing more aggregate analytic units. Gender analysis is a methodology for presenting a comprehensive picture of women’s and men’s contributions to national development.

## WID AND GAD: TRENDS IN PRACTICE

Traditional data collection methods often *omit* women’s multiple roles and contributions to development. The women in development (WID) approach to development planning highlights the importance of women’s contributions, focusing primarily on women. Other development programs focus on the

household or family as the **unit** of analysis, but they do not look at the individual rights, roles, and responsibilities of the individuals within the family. These approaches assume that each member of the family shares equally all the benefits accruing to the family as a whole. This assumption has proved to be incorrect.

Gender and development (GAD) differs from these approaches by adding to WID to include **both women and men**. Development policies and plans are frequently based on the assumption that men alone support families, but in reality it is women and men together who do so; in the growing number of female-headed households it is women alone who do so.

Experience and research supports the assertion that the fundamental elements of effective development management—sustainability, productivity, and equitability—are strengthened through explicit attention to gender. A better understanding of gender as a variable in rural and urban livelihood systems can be gained by using a variety of analytical tools that fall loosely under the rubric of gender analysis.

## **THE PROBLEM: CHANGING GENDER ROLES AND TRANSFORMING ECONOMIES**

Around the world, women's and men's responsibilities differ according to the specific situations in which they live. These circumstances are shaped by:

- environment
- economic conditions
- class
- culture
- national history
- household circumstances
- legal structures
- religion
- occupation

In much of the developing world, resource productivity is declining. In order to survive in a cash economy under conditions of a declining resource base, men and women, even in the most remote parts of the world, increasingly seek local wage labor in both rural and urban areas. They are also planting and selling more cash crops, often at the expense of subsistence crops.

Global conditions cause the following phenomena in rural communities:

- extensive out-migration
- more time-intensive work for those left behind
- growing numbers of women-managed households
- new responsibilities for women without increased access to resources
- new norms and expectations as families become fragmented
- changes in gender and generational perspectives
- shifts from exchange work groups to wage labor

## **LINKAGES: GENDER AND POVERTY**

Despite the accumulating forces for greater participation, large numbers of people continue to be excluded from the benefits of development: the poorest segments of society, people in rural areas, many religious and ethnic minorities and, in almost every country, women. Women are the world's

largest excluded group. Even though they make up half the adult population, and often contribute much more than their share to society—inside and outside the home—they are frequently excluded from positions of power. Many developing countries also exclude women from both political participation and productive work—whether by tradition, discriminatory laws, or withheld education. Indeed, for decades, life has changed very little for 500 million rural women in the developing world.

Powerful vested interests erect numerous obstacles to block off the routes to women’s political and economic power. These obstacles include:

### **LEGAL SYSTEMS**

Laws are often arbitrary and capricious and favor those with political influence or economic clout. In too many countries, legislation fails to measure up to ideals of transparency, accountability, fairness, and equality before the law. Some countries exclude the participation of women, for example, or of religious or ethnic minorities, or deny certain rights to workers.

### **BUREAUCRATIC CONSTRAINTS**

Many developing countries have shackled their people with innumerable regulations and controls, demanding all sorts of permits and permissions for even the most modest business initiative. Fortunately, many governments have started to dismantle the most stifling of these controls and are opening new avenues for entrepreneurial activity.

### **SOCIAL NORMS**

Even when laws change, many old values and prejudices persist, and are often deeply embedded in everyday language and behavior. Laws may promote equality, but it is usually left to the discriminated group to struggle against prejudice. Thus, working women, even when they prove themselves better, are frequently not given equal treatment.

### **MALDISTRIBUTION OF ASSETS**

In developing countries, one of the most significant assets is land. A high proportion of the people struggle to make a living in agriculture, but their efforts are often thwarted by the dominance of feudal elites who exert an overwhelming control over land. In these countries, there can never be true participation in the rural areas without far-reaching land reforms—as well as the extension services, trading, and credit for smaller farmers (particularly women) that can help them become productive and self-reliant.

Whether in urban or rural areas, vested interests that currently enjoy economic, financial, political, or social power are usually determined to defend their position—either individually or through close-knit associations, well-financed lobbies, and even violence.

Changing the power equation requires the organization of a countervailing force. People’s organizations—be they farmers’ cooperatives, residents’ associations, consumer groups, or political parties—offer some of the most important sources of countervailing power. And they often exercise it most effectively through the sharing of information and ideas—it is ideas, not vested interests, that rule the world for good or evil.

## **TOOLS FOR GENDER ANALYSIS**

Tools for gender analysis are essential building blocks for projects and programs aimed at improving lives in sustainable ways. They reveal how gender differences define people’s rights, responsibilities,

and opportunities in society. Recognizing the ways that development affects men and women differently allows planners to incorporate this information in the successful implementation, monitoring, and evaluation of development projects and programs.

These tools offer ways of gathering data and analyzing gender as a variable in household and community organization for development. The methods give new insights into the local situation and permit a more comprehensive understanding of the community's situation, and facilitate the creation of a more effective equitable development program.

Through its GAD and PACA training materials, the Peace Corps has introduced several gender analysis tools. For analyzing the macro-level, the Contextual Analysis format provides levels of considerations of both opportunities and constraints to women and men. The Gender Information Framework is a guide for culturally determined elements *within the household* that need analysis prior to project planning. The PACA materials provide a philosophy and methodologies for including the participants in the gender analysis and subsequent community action, with the development worker as partner.

Gender affects development and shapes opportunities for building local-level capacities across cultural, political, and ecological settings. Project experience shows that information about gender is vital to effective and sustainable outcomes. Interest in gender analysis has been spurred largely by those concerned about women's roles and their desire to transform gender relations across many dimensions of development. In reality, all people interested in effective and equitable development management and in long-term capacity-building for local communities must address issues of gender as it pertains to the development process.

For example, knowledge of differences in men's and women's savings strategies can indicate new ways to mobilize savings and thus establish stronger credit programs. Awareness of how men and women receive information (e.g., through newspapers, radio, at the health clinic) can assist in designing effective information dissemination systems. Knowing gender differences in mobility between and within towns can assist in designing primary and secondary school programs that increase both male and female enrollment. Knowledge of intra-household responsibility for seed selection for next year's planting provides an opportunity for agricultural researchers to gain greater understanding of the drought-resistant, early maturing, and disease-resistant characteristics of a particular plant variety.

## APPLICATION OF GENDER ANALYSIS DATA

Development programmers can apply what they have learned at many project stages. As planners and implementers engage in important planning and implementation activities, the following guidance on project features will be useful.

### PROJECT FEATURES TO CONSIDER

- Choice of promotion strategy
- Choice of technical packages
- Timing and duration of activities
- Delivery systems
- Location of project activities or services
- Eligibility criteria
- Nature and distribution of benefits

## **CHOICE OF PROMOTION STRATEGY**

Promotion strategies need to take into account communication networks and language differences. Because of limited mobility and less education, women are less likely to speak a European or national language that must be learned in school. Women are therefore less able to take advantage of programs, education, and services. Language requirements need to be considered in outreach and training programs.

Women usually have different communication networks. While men may receive information from newspapers, radios, or at men-only village meetings, women may give and receive information at the clinic, the well, or alternate sources. To ensure that information about resources or new technology is adequately disseminated, it is important to identify gender-specific communication networks.

## **CHOICE OF TECHNICAL PACKAGES**

Different technical approaches to development problems are frequently necessary to appropriately address the roles and responsibilities of men and women. Planners should ask: are technical packages applicable to all households (both male- and female-headed), or only those with certain types of resources? Are technical packages targeted for the person responsible for the activity, and do they match that person's resources? Are credit procedures appropriate for both men and women? Do education and training curricula address productivity issues related to both men's and women's activities?

## **TIMING AND DURATION OF ACTIVITIES**

Women's home constraints differ from those of men because of their dual family and economic roles and responsibilities, which are often intertwined. Project activities, such as trading or voluntary labor contributions, need to take into account women's daily and seasonal time constraints. Training held during morning food preparation hours, for example, essentially precludes the participation of many women.

## **OUTREACH OF EXISTING DELIVERY SYSTEMS**

Often women operate outside existing delivery systems. They frequently have less access to outreach or extension agents. There are a variety of explanations for this situation, ranging from cultural norms constraining contact between nonfamily males (extension agents), to lack of information appropriate to their needs provided by the delivery system.

## **LOCATION OF PROJECT ACTIVITIES OR SERVICES**

Cultural norms often restrict the mobility of women. They are less likely to be able to travel to distant training sites, clinics, village meetings to discuss where water wells and schools should be placed; to access banks or financial services; and benefit from other meetings and services development projects often provide.

## **ELIGIBILITY CRITERIA**

Eligibility criteria often preclude women's participation. English language requirements, for example, can reduce the eligible pool of women candidates for training, since fewer women have had access to educational institutions where English is taught. Age limits on long-term training programs may inadvertently restrict women's participation, since often they must remain at home with their children. Credit programs that require land as collateral essentially eliminate women's participation in many cultures. In some instances the criteria are more stringent than necessary and should be revised. For example, alternative forms of collateral could be devised. Other options could provide the training and assistance that would enable women to meet the requirements.

## NATURE AND DISTRIBUTION OF BENEFITS

Direct access to benefits affects incentives to participate. When women are expected to work or participate but receive few benefits, which has occurred in agriculture and natural resource management projects, they are less likely to participate. Sometimes development interventions put additional burdens on women's daily tasks because those tasks are not identified in advance. Furthermore, unexpected tasks may limit other important activities and may not provide income that directly benefits the women and children.

## CONCLUSION

Saying that the "people" or "community" will participate in a development project obscures the different activities, resources, and constraints of women and men. Gender roles are critical to any effort. These roles vary greatly by culture, and may change over time. Therefore, they must be examined in each specific context to avoid faulty generalizations or assumptions. "Standard" gender-sensitive project design is a contradiction. Every development context is unique and requires specific analysis to yield appropriate and adequate responses.

Excerpted from materials produced by the United States Agency for International Development's GENESYS Project; Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management by Thomas-Slayter, Esser, and Shields, Clark University's International Development Program; and Human Development Report 1993, Oxford University Press.

# GENDER AND DEVELOPMENT VOCABULARY AND DEFINITIONS

**GENDER** A sociocultural variable that refers to the comparative, relational, or differential roles, responsibilities, and activities of males and females. They are what a society or culture prescribes as proper roles, behaviors, personal identities, and relationships. Gender roles vary among societies, within societies, and over time; they are not bound to either men or women.

**GENDER AND DEVELOPMENT (GAD)** An approach to development that focuses on everyone: men and women, boys and girls. Gender is much more than an equity issue; gender roles, including access to resources, affect economic growth as well as social stability and well-being in a society.

**GENDER ANALYSIS** Gender analysis is not a specific method as much as it is a type of lens for focusing on particular aspects of cultural reality. In gender analysis, the effects of other variables are taken into account to provide a complete picture of the factors affecting people's participation in the economy and development efforts and the impact of these efforts on their lives. The analysis examines the roles and participation of women and men belonging to specific groups involved in a development activity.

**GENDER ANALYSIS TOOLS** Gender analysis is conducted through various types of tools, both quantitative and qualitative, such as analysis of sex-disaggregated data on national as well as regional and local levels, and contextual analysis including policies/laws, cultural norms, and community and household distribution of tasks, allocation of resources, and means of decision-making.

**GENDER DIFFERENCES** Differences in males' and females' roles in society usually operate in association with other socioeconomic variables. Neither all men nor all women necessarily share the same interests, concerns, or status. These vary by race, ethnicity, income, occupation, age, level of education, etc. Additionally, concerns and status of men and women differ within groups, whether racial, ethnic, age, or class.

**GENDER-NEUTRAL** Two significantly different uses of this term appear in development literature and even training materials:

- (1) Approaches to development that assume equal opportunities and benefits to both men and women without questioning whether a person's gender constrains or favors his/her access to resources and participation in decision-making are called gender-neutral.
- (2) Projects that have been analyzed and shown to show no gender bias may be termed gender-neutral.

**SEX** As an analytical category, sex distinguishes males and females exclusively by biological characteristics. For example, quantitative data are sex-disaggregated, because the whole universe consists of two sexes, men and women.

**SEX-DISAGGREGATED DATA** Information collected and reported by sex.

**WOMEN IN DEVELOPMENT (WID)** WID is a special effort to include women as participants in and beneficiaries of development because women, more often than men, have been left out of the development process. Sometimes it has focused on women's projects rather than being integrated into other development projects.

**WORK** How one fills one's time.

**PRODUCTIVE** Paid or wage labor, income-generating activities.

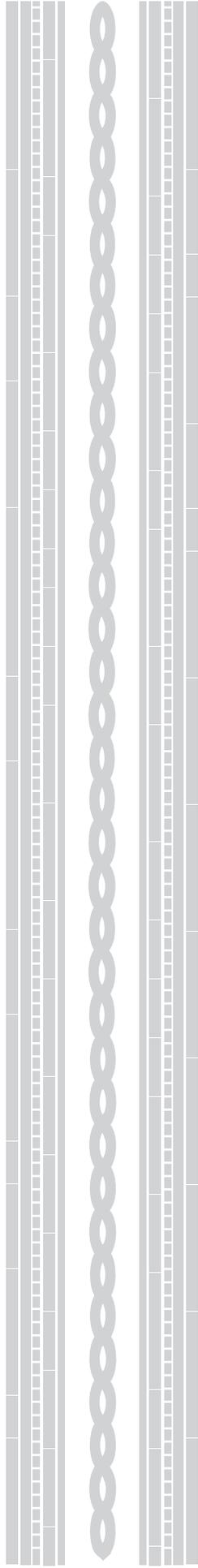
**REPRODUCTIVE** Domestic, child care; generally non-paid. Often includes subsistence farming and food preservation.

**INTEGRATIVE** Tasks with the function of holding society together and building morale in the community, such as tempering disappointments and grief and celebrating success and joy, or related to life stages: care for disabled and elderly, rituals and religious observances. It is not generally acknowledged as work.

**STATUS ENHANCEMENT** Activities usually seen as result of economic privilege: public volunteer work, entertaining, consumerism/shopping, social and cultural obligations.

**NON-WORK** Activities involving personal maintenance (sleeping, eating, exercise, physical grooming) and leisure activities of one's choice done for pleasure.

**INVISIBLE WORK** Non-paid work is considered invisible as it is not reflected in income statistics.



# DEVELOPMENT APPROACHES

## TRADITIONAL VIEW

Household

+

Resources

=

All in household benefit;  
life improves

## WITH GENDER ANALYSIS

M/W

+

M/W

=

Men & women benefit;  
projects more effective

# GENDER AND SEX

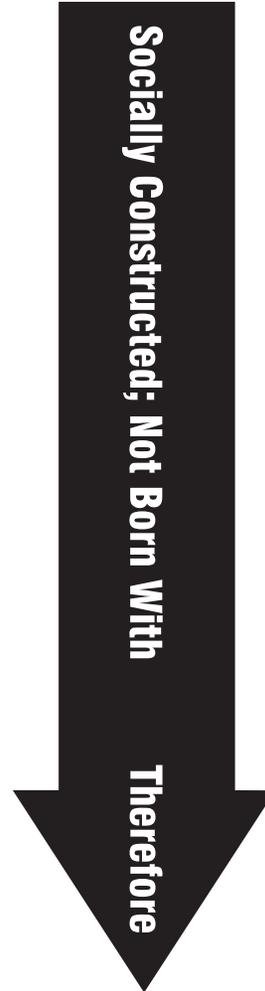
## Sex



### Cannot Be Changed

1. Only women can give birth.
2. Only men can supply sperm.

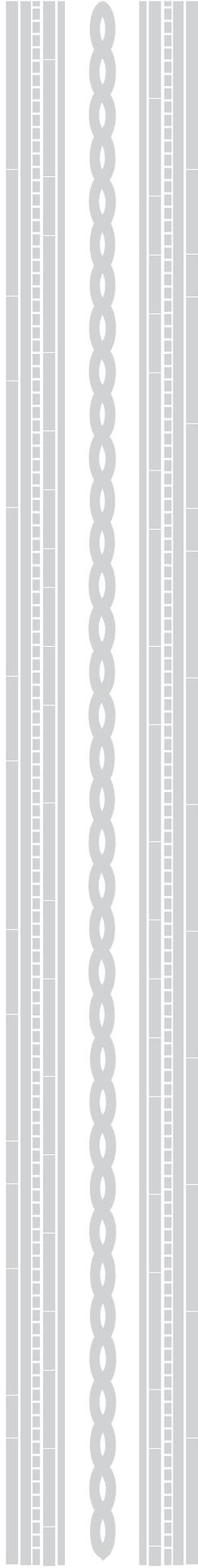
## Gender



### Changeable

1. Women can do traditionally male jobs as well as men.
2. Men can take care of children as well as women.

**GENDER ≠ WOMEN**



# INTRODUCTION TO A SYSTEMS APPROACH

## RATIONALE

This session introduces the concept of systems analysis as a point of reference for understanding the process of socioeconomic change in households and local communities. It provides an integrative framework that places gender role differences within a broader context of development. The systems approach helps identify the nature of household decision-making, constraints on change to various aspects of the household, and strategies for project development.

## TIME



2 - 2 1/2 hours

## GOAL AND OBJECTIVES

### GOAL

To understand individual and family behavior within a larger societal context.

### OBJECTIVES

1. To identify the variation in rights, roles, and responsibilities within families.
2. To identify culturally determined aspects of the family system.
3. To consider how changes in one household activity will affect changes in other activities.
4. To analyze the potential issues in a project at various contextual levels outside of the household itself.
5. To introduce a gender analysis framework.

## SESSION OUTLINE

- I. Introduction – includes case study/game (20 minutes)
- II. The household as a system (45 minutes)
  - A. Components of the household system (30 minutes)
  - B. Concepts of work (15 minutes)
- III. The household within a larger system (15 minutes)
- IV. The importance of gender analysis in understanding the system (40 minutes)
- V. Gender Information Framework (GIF) activity (20 minutes)
- VI. Summation (10 minutes)

## TRAINER PREPARATION

1. Select from activities in the session, as needed; do each exercise and make individual notes, as needed.
2. Determine whether the rice project activity will be done as a game or an exercise. By adding the element of a game with competition, some trainers feel it stretches people to be more creative in their search for reasons the project had unexpected results. If you feel this trivializes the activity, leave out the game element.
3. Watch video.
4. Prepare flip charts and copy handouts.

## MATERIALS



- Flip chart
- Markers
- Masking tape
- VCR and monitor
- Video: *Gender Analysis of Forestry Projects: Why?* (found in *Peace Corps Digitized Video Resources, Vol. I* [ICE No. RE042])
- Prize for game (candy or ???)

## HANDOUTS

- Philippine Rice Project
- The Household as a System
- The Concept of Work
- Contextual Analysis
- Gender Information Framework (outline or form)

## FLIP CHART

- Gender Information Framework (outline)

## PROCEDURE



### I. INTRODUCTION (20 minutes)

- A. Introduce the session with a statement about the purpose: to consider the family as a system and review how gender roles vary among societies and within a community, and develop an awareness as to why gender analysis is important for project development.
- B. Begin with an activity. Divide the participants into small groups, each group with a piece of flip chart paper and a marker. Explain that each participant will receive a description of a Philippine rice project that had some unexpected results. Explain that participants are to brainstorm a list on the flip charts of all possible reasons for the results. They should be creative. They will have a 10 minute time limit. At the end of 10 minutes, the group with the most possibilities will win.

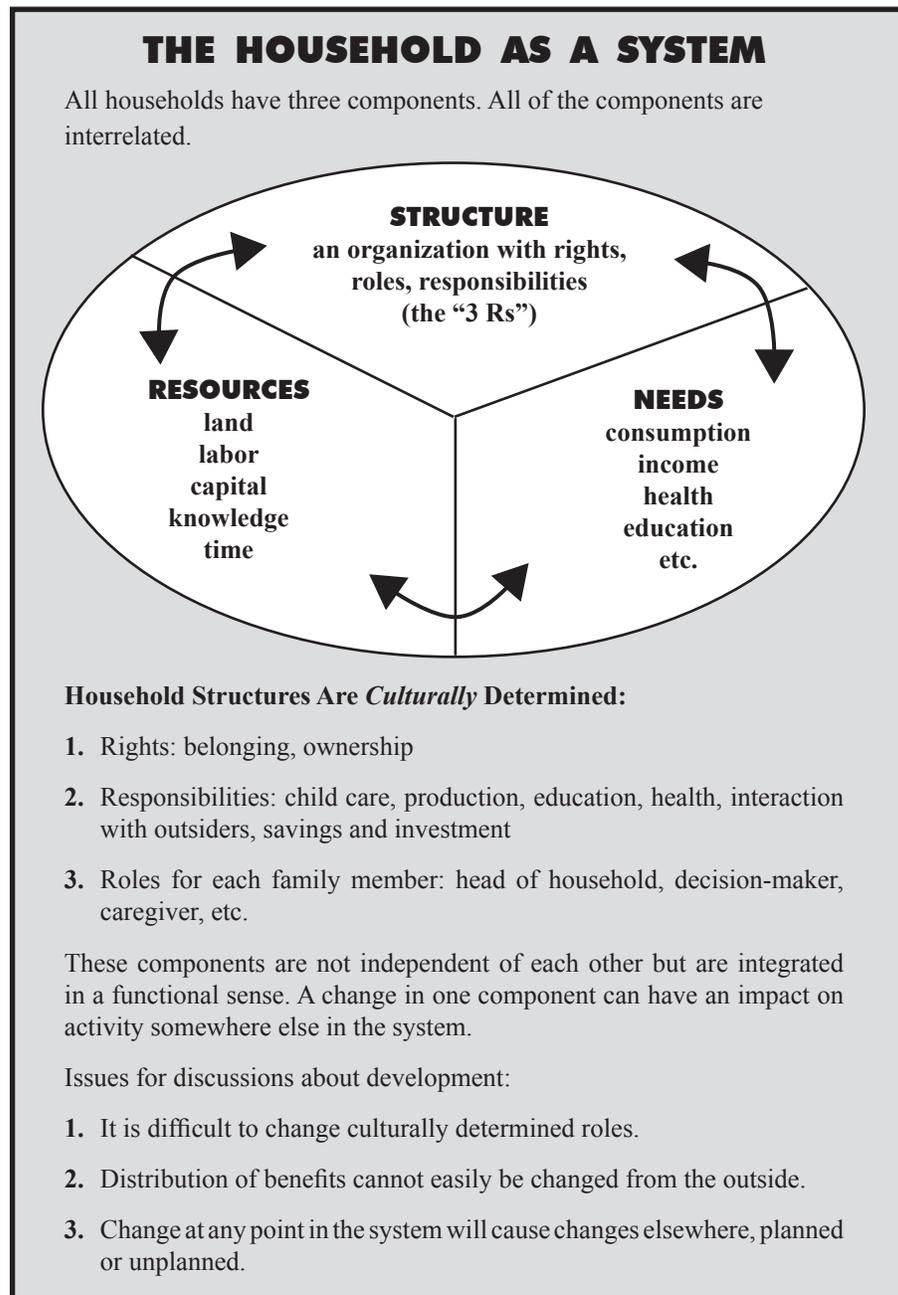
- C. Distribute the “Philippine Rice Project” handout and set the groups to work.
- D. Call time. Ask for each list to be brought forward and posted. Have someone from each group report out on its discussion and read its list of reasons for the unexpected results. After the first report, subsequent groups can simply add any items not previously mentioned. Add up numbers of entries and award prize.

Keep the flip charts posted and handy for referral during following sessions.

## II. THE HOUSEHOLD AS A SYSTEM (45 minutes)

### A. Components of the Household System (30 minutes)

1. Distribute “The Household as a System” handout. Discuss the diagram and emphasize the points made at the bottom of the diagram.



2. What examples of household structure can be noted from the rice project case study that was discussed?

Possible responses:

**STRUCTURE:**

- Roles:**
- decision-making
  - planting, weeding
  - harvesting
  - post-harvest tasks
  - purchasing seed, fertilizer
  - selling rice
  - craft production and sales
  - other?

**RIGHTS:** what is the relative distribution of rights to family resources, such as savings and income, livestock, land ownership?

**RESPONSIBILITIES:** who is responsible for which rice production tasks, and who is responsible for providing funds for health, education, and other needs?

**RESOURCES:** who has access to and control over:

- Land:**
- land use
  - mechanisms of land access
  - quality of land
- Labor:**
- division of labor
  - seasonal availability
  - levels of skill
  - off-farm labor
  - subsistence and income-generating labor
- Knowledge:**
- access to technical assistance
  - language skills to attend training
  - literacy and numeracy
  - understanding of local environment
  - understanding of how family income is used

**NEEDS:** What is the impact on:

- time spent on each aspect of rice production
  - other income generation for family
  - family health and nutrition
  - children's education
3. We have attempted to point out the need for more careful analysis of the household by considering how a project might impact one or more activities within the system. One of the areas we identified was the work that has to be done. Let's look more specifically at the concept of work.
- B. Concept of work (15 minutes)**
1. Distribute "The Concept of Work" handout. Go through the definitions. Relate the definitions back to the example used in the first part of the session.

## THE CONCEPT OF WORK

**PRODUCTIVE** – To earn money

- Income-generating activities
- Paid or wage labor

**REPRODUCTIVE** – To maintain the home and family

- Housework (wash, clean, etc.)
- Caring for children
- Subsistence food production

**INTEGRATIVE** – To hold society together

- Care for elderly, people with disabilities
- Birth, marriage, funeral observances
- Other religious observances
- Local, regional, national celebrations

**NON-WORK**

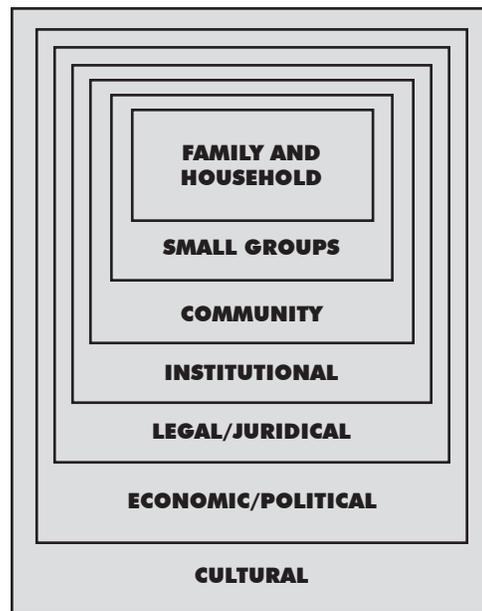
- Eating
- Sleeping
- Personal grooming
- Exercise
- Leisure activities of own choice

*Note: Work that is not paid for is considered “invisible” and, as such, is not reflected in economic statistics. Historically, development projects focused only on productive work. These projects often interfere with important household functions and activities.*

2. Apply these definitions to the rice project discussed previously. What type of work did the project address? What other types of work influenced the project’s outcome? How might some of the errors of this project have been avoided?

### III. THE HOUSEHOLD WITHIN A LARGER SYSTEM (15 minutes)

- A. State that the household doesn’t function as a closed system. There are many influences on the household from outside the system. Another diagram provides some of these influences.
- B. Distribute the “Contextual Analysis” handout.



- C. Here we see the household at the center of many other concentric rings, each of which has an impact in different ways on the family. What are possible issues or factors that might have an impact on a family who is trying to increase income by more rice production?

Possible responses:

**SMALL GROUPS:**

- rice farmers — all chosen to get new rice or only some?
- “strong men”
- perhaps groups of women who have a craft cooperative
- rice farmers’ wives who may not be able to make crafts to sell now
- others?

**COMMUNITY:**

- population: women, children, youth, elderly, different ethnic groups (affected the same or differently by the project?)
- other farmers not included in this project
- How are community decisions made?
- What is the impact on water resources for everyone?
- Are there factions, feuds within the community?

**INSTITUTIONAL (NGO OR GOVERNMENT):**

- Who provided the rice? At what cost? With what type of training, agreement for repayment?
- What is its relationship with community?
- What are other institutional influences on the situation?

**LEGAL/JURIDICAL:**

- Any legal issues over land use?
- Who “owns” the land?

**ECONOMIC/POLITICAL:**

- Any political reasons this community was chosen to get this project?
- Is there a market for the extra rice? The infrastructure (roads, markets) for selling it?

- Are there higher costs for the seed? Or need for additional products, such as fertilizer? Cost? Availability?

**CULTURAL:**

- Roles, rights, responsibilities
- Is rice, alone, the issue?
- Other events associated with income generation? Use of income?
- Religious implications?

- D.** How can the information be obtained to better understand why a past project did not succeed, or whether a new one will? The people who are involved, or potentially will be involved, in the development activities need to analyze their own systems, within their culture and contexts.

The rice project failed its goal of increasing family income because the net gain from increased rice production did not make up for the loss of income from women's crafts made from the rice straw. Why? There was less straw from the new rice (look at the drawing) and less time to make crafts because more time was needed for post-harvest processing.

A more comprehensive analysis of the family system of the rice-farming family would have given the development agency important information. But, without considering the roles, responsibilities, and rights of both men and women, perhaps the impact of the project would not have been predicted. Let's add to our analysis, then, the gender component.

**IV. THE IMPORTANCE OF GENDER ANALYSIS IN UNDERSTANDING THE SYSTEM** (40 minutes)

Introduction to video:

The video we are about to see describes how gender roles, rights, and responsibilities can vary, and how those variations might affect the impact of outside interventions.

Show the video *Gender Analysis of Forestry Projects: Why?*

The video has introduced the term "gender analysis." Let's now look at a framework for looking at gender data.

Either:

Use the "GIF Outline" on flip chart if doing the exercise below,

or

Distribute the "GIF Outline" handout, if not going to work with the tool.

The Gender Information Framework (GIF) is a framework to help us generate and analyze information. **It is not a survey form.** Many types of information listed on the GIF are quite personal. It would not be appropriate to ask individual questions about such information. As we learn about how a family functions, through observation, group discussions, participatory techniques, etc., we can begin to identify the more important information that the GIF produces. Review the aspects of the household that need analysis. (flip chart)

## **GENDER INFORMATION FRAMEWORK (OUTLINE)**

### **Exploratory Factors**

Task implementation  
Income  
Expenditures  
Resources  
Time/seasonability  
Decision-making  
Other factors

### **Analytic Factors**

Constraints  
Opportunities  
Assumptions

## **V. GIF ACTIVITY [OPTIONAL]** (20 minutes)

Distribute the blank “GIF Form” handout. Assign pairs or small groups to look at one section in I.A. (Exploratory Factors), assigning each group a different section. They are to list what they know about the family system of the rice farmers and the information that is needed to understand it.

After they have had about 10 minutes to work, go through the GIF categories, taking examples for each category from the groups that worked on them.

Finally, ask them, What questions did this raise for you?

## **VI. SUMMATION** (10 minutes)

This session has introduced a systems approach and why it is important to development. We learned about the different components of the system and why an understanding of gender roles is crucial to project success. We have also identified who has the knowledge: the people themselves, not the outsiders. In future sessions, we will explore how this type of information can be gained and analyzed by the community itself, and what the role of the Volunteer (or other development worker) is in the process.

[Optional] Ask who can:

1. Describe how a household works as a system?
2. Give an example of a change in the household that will cause other changes? What might the resulting changes be?
3. Explain some of the contexts within which households function?
4. Give an example of a contextual factor in the project we looked at?
5. Explain what the GIF helps us do?

## PHILIPPINE RICE PROJECT

In a region of the Philippines where families are rice farmers on small land holdings, development workers looked for ways to increase family income. All family members had their own roles in rice production, harvest, and post-harvest. Additional income-earning schemes included the making and selling of straw baskets by women and children. Still there was not sufficient family income to permit all children to attend school and for adequate health care.

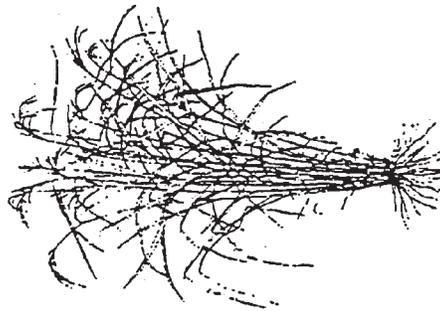
To increase family income, the intervention decided upon was to increase rice production through an improved high-yield strain, as it appeared to be the least disruptive to the rice culture already in existence and would not require more land. A new “modern rice” (see next page) was introduced and, over several years, it was accepted. By the end of five years, production had more than doubled. However, family income went down.

What happened? Using your creative thinking, generate as long a list of possible impacts on individuals, households, and the community of the introduction and successful production of modern rice as you can imagine.

# **SUPER RICE**

A new breed of “super rice” developed by agricultural researchers produces a high yield with less fertilizer than varieties currently being grown. Here is a comparison:

## **TALL CONVENTIONAL RICE**



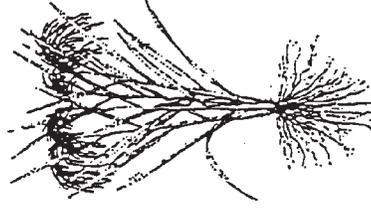
- Period in use: Before 1968
- Height: 43 –70 inches
- Leaves: Thin, long
- Growth duration: 140 – 180 days
- Grain yield potential: 0.6 – 1.4 tons/acre

## **MODERN RICE**



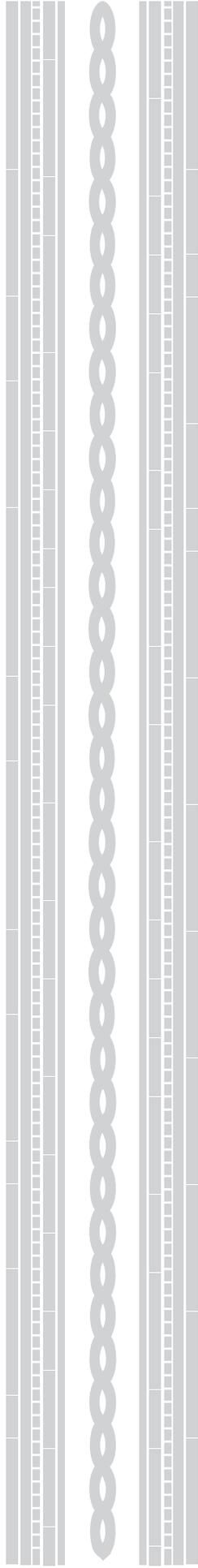
- Period in use: 1970s and 80s
- Height: 35 – 43 inches
- Leaves: Thin, short
- Growth duration: 110 – 140 days
- Grain yield potential: 2.4 – 4 tons/acre

## **SUPER RICE**



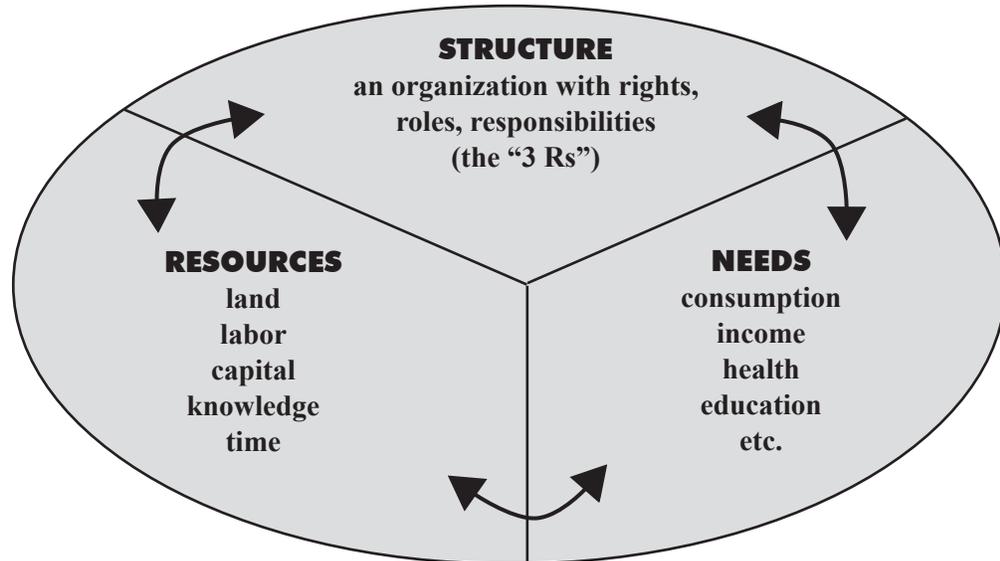
- Period in use: Introduction expected in 21st century
- Height: 35 – 43 inches
- Leaves: Thick, short
- Growth duration: 100 – 130 days
- Grain yield potential: 5.3 tons/acre

Source: International Rice Research Institute



# THE HOUSEHOLD AS A SYSTEM

The household has three components. All of the components are interrelated.



Household structures are *culturally* determined:

1. Rights: belonging, ownership
2. Responsibilities: child care, production, education, health, interaction with outsiders, savings and investment
3. Roles for each family member: head of household, decision-maker, caregiver, etc.

These components are not independent of each other but are integrated in a functional sense. A change in one component can have an impact on activity somewhere else in the system.

Issues for discussions about development:

1. It is difficult to change culturally determined roles.
2. Distribution of benefits cannot easily be changed from the outside.
3. Change at any point in the system will cause changes elsewhere, planned or unplanned.

# THE CONCEPT OF WORK

**PRODUCTIVE** – To earn money

- Income-generating activities
- Paid or wage labor

**REPRODUCTIVE** – To maintain the home and family

- Housework (wash, clean, etc.)
- Caring for children
- Subsistence food production

**INTEGRATIVE** – To hold society together

- Care for elderly, people with disabilities
- Birth, marriage, funeral observances
- Other religious observances
- Local, regional, national celebrations

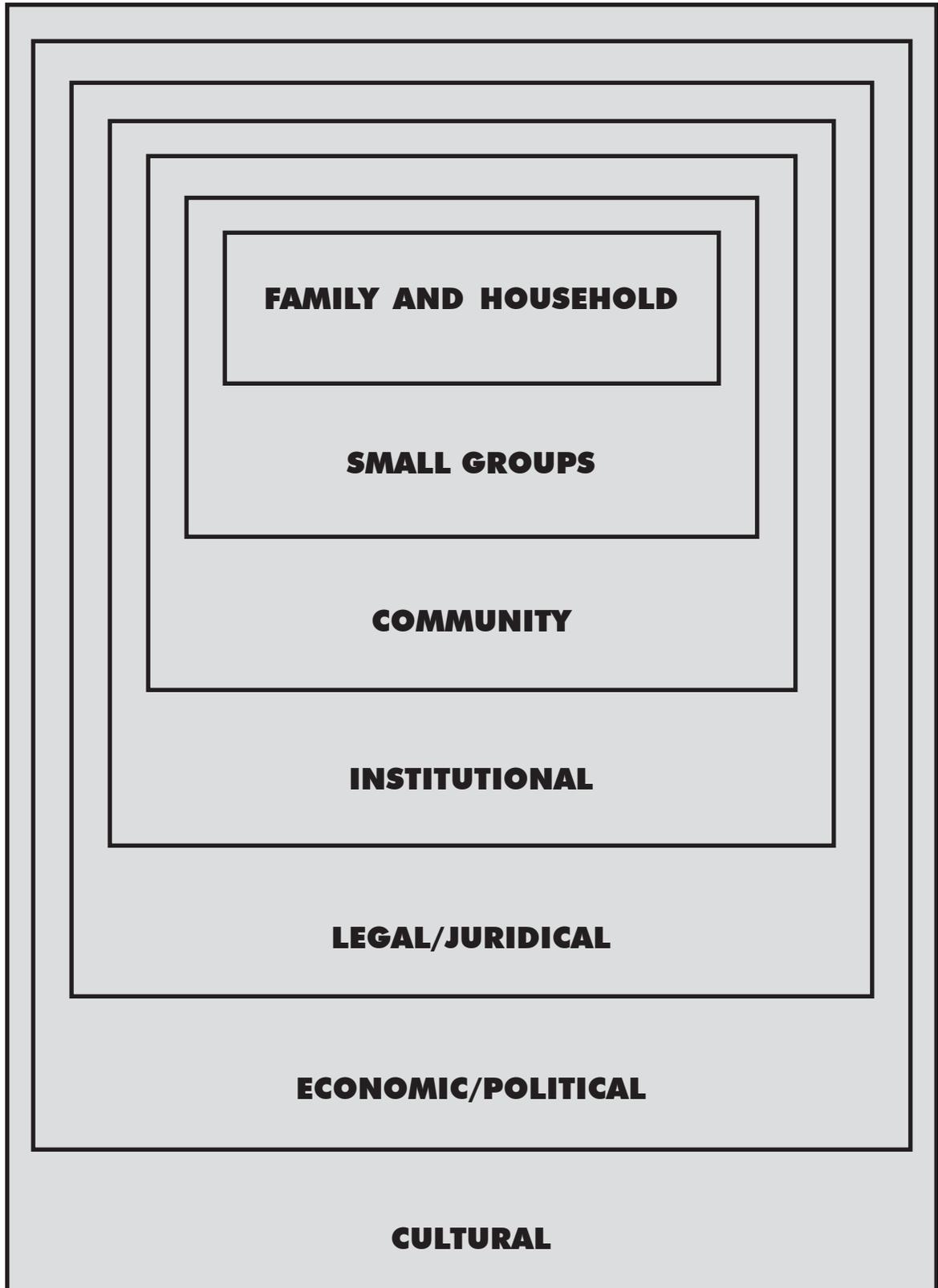
**NON-WORK**

- Eating
- Sleeping
- Personal grooming
- Exercise
- Leisure activities of own choice

*Note: Work that is not paid for is considered “invisible” and, as such, is not reflected in economic statistics. Historically, development projects focused only on productive work. These projects often interfere with important household functions and activities.*

Adapted from work by Mary Hill Rojas

# CONTEXTUAL ANALYSIS



From USAID's GENESYS Project

# **GENDER INFORMATION FRAMEWORK (OUTLINE)**

## **Exploratory Factors**

Task implementation

Income

Expenditures

Resources

Time/seasonality

Decision-making

Other factors

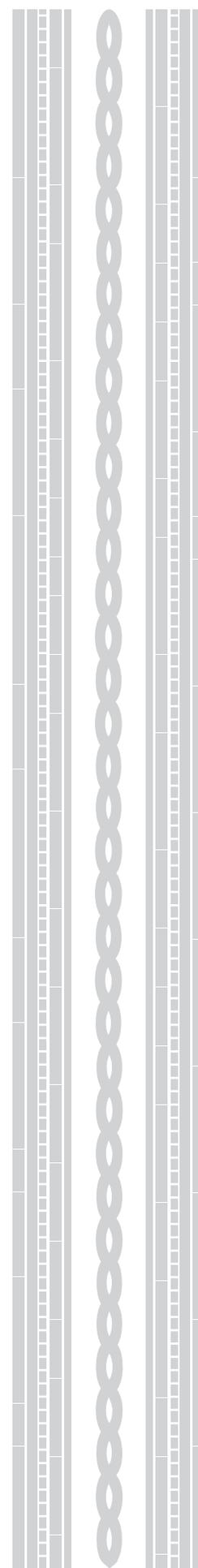
## **Analytic Factors**

Constraints

Opportunities

Assumptions

## **Recommendations**

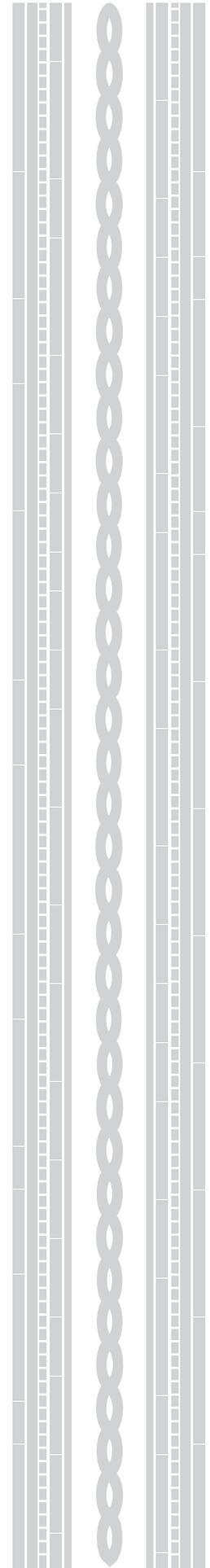


# GENDER INFORMATION FRAMEWORK

## I. EXPLORATORY FACTORS

<p><b>A. EXPLORATORY FACTORS</b></p> <p><b>1. TASK IMPLEMENTATION</b></p> <p>(Who does what task? Include paid work, agriculture, other income-generating activities; food preparation and allocation; other household activities like cleaning, laundry, child care, tool-making/repair, sewing, schooling; out of home work, community work, “leisure” activities which produce products for the home or for sale.)</p>	<p><b>WOMEN and GIRLS</b></p>	<p><b>MEN and BOYS</b></p>

<p><b>2. INCOME</b>                      (Who earns what, in cash or kind? For example, through sale or exchange of products [raw or finished], family or individual enterprises, crafts, wage labor or work parties, any extra income-generating activities.)</p>	<p><b>WOMEN and GIRLS</b></p>	<p><b>MEN and BOYS</b></p>
<p><b>3. EXPENDITURES</b>                      (Who contributes what toward household finances? For example, certain foods or basic goods, clothing, ceremonial costs, agriculture/business inputs, tools/equipment, education, medical fees, purchase of land/animals/materials/goods, savings, hired labor, etc.)</p>		



**4. RESOURCES**

(Who has access to and/or controls key resources? Include **physical**, such as land, buildings, labor, water, animals, vehicles, tools/equipment, raw materials, agriculture/business inputs; **financial**, such as capital, credit; **informational**, such as formal education/literacy, technical assistance, extension services, official languages, local agro-ecological-technical knowledge; **socio-organizational**, such as membership in dynamic, powerful, or legally recognized organizations, political connections/patrons, etc.)

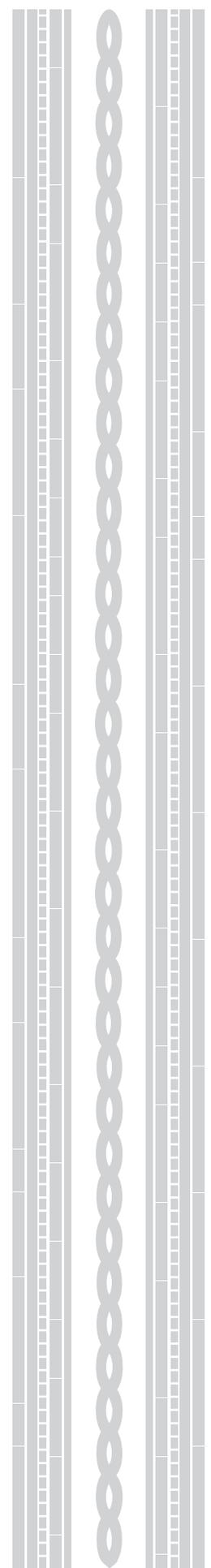
**5. TIME/SEASONALITY**

(Of any of the following factors: labor availability [both household and non-household], access to markets/transport, income/expenditures, resource access/control, daily use of time/availability for other events, including training.)

**WOMEN and GIRLS**

**MEN and BOYS**

<p><b>6. DECISION-MAKING</b>                      (Who decides about behaviors or investments required? For example, can men and women make independent decisions about certain of the foregoing factors, or only men, or do they do so jointly? Or, must some decisions be made by entities larger than just the household, such as the community, elders, or local government?)</p>	<p><b>WOMEN and GIRLS</b></p>	<p><b>MEN and BOYS</b></p>
<p><b>7. OTHER</b>                      (Any other gender-related factors you feel might be basic to any community action or project?)</p>		



**B. ADDITIONAL DATA NEEDED**

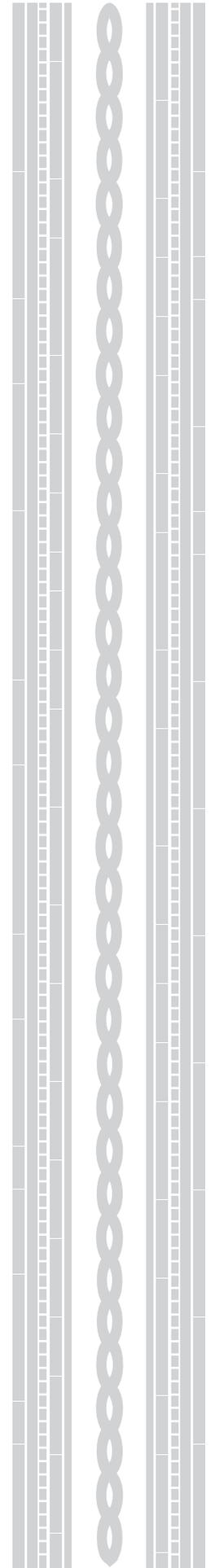
(These are “missing data” that are not known or available for completing some of the factors above but that are likely to be relevant to designing and implementing a project.)

**WOMEN and  
GIRLS**

**MEN and  
BOYS**

**II. ANALYTIC FACTORS**

<p><b>A. ANALYTICAL FACTORS</b></p> <p><b>1. CONSTRAINTS</b></p> <p>(In general or in relation to specific project objectives, such as on labor, time, on access to all the various kinds of resources, on decision-making; any cultural constraints; no clear incentives to change; project participation could jeopardize other current activities)</p>	<p><b>WOMEN and GIRLS</b></p>	<p><b>MEN and BOYS</b></p>
<p><b>2. OPPORTUNITIES</b></p> <p>(In general or in relation to specific project objectives, such as roles traditionally assigned to one or the other gender that facilitate project implementation; gender skills and knowledge that can be tapped; good fit of potential project with current cultural norms; clear incentives to project participants in terms of likely benefits)</p>		



**B. ASSUMPTIONS**

(Guesses you had to make in order to complete an analysis pending finding out the needed information)

**WOMEN and  
GIRLS**

**MEN and  
BOYS**

Based on Gender Information Framework developed by USAID's GENESYS Project

# CONTEXTUAL ANALYSIS

## RATIONALE

This session introduces gender analysis through the use of a broad-ranging tool, Contextual Analysis. This gender analysis tool focuses on the various levels of the socioeconomic context in which development happens. Practice in analyzing the potential gender issues at the various levels is accomplished with a video.

## TIME



1 hour 45 minutes

## GOAL AND OBJECTIVES

### GOAL

To introduce a tool which assists in the analysis of issues in the interwoven social and economic systems of a country.

### OBJECTIVES

1. To identify gender issues in a particular situation (presented through a video).
2. To analyze one or more gender issue through the Contextual Analysis matrix.
3. To apply the learnings of this exercise to potential projects, situations.

## SESSION OUTLINE

- I. Introduction (10-15 minutes)
- II. Video (30 minutes)
- III. Group work (45 minutes)
- IV. Summary (5 minutes)

## TRAINER PREPARATION



1. Read the “Contextual Analysis of Gender and Social and Economic Issues” handout. Study the “Contextual Analysis Matrix.”
2. View the video *The Water of Ayole* (or an alternate choice), noting gender issues.
3. Practice using the Contextual Analysis tool by working across the matrix horizontally for one or two of the components.

4. Prepare some examples from your own experience.
5. Prepare the handouts.

## MATERIALS



- VCR and monitor
- Video: *The Water of Ayole* (Peace Corps Digitized Training Resources, Vol. 1 [ICE No. RE042])
- Blank flip charts
- Marking pens
- Tape

## FLIP CHARTS

- Contextual Analysis diagram
- Small group task
- Contextual Analysis Matrix

## HANDOUTS

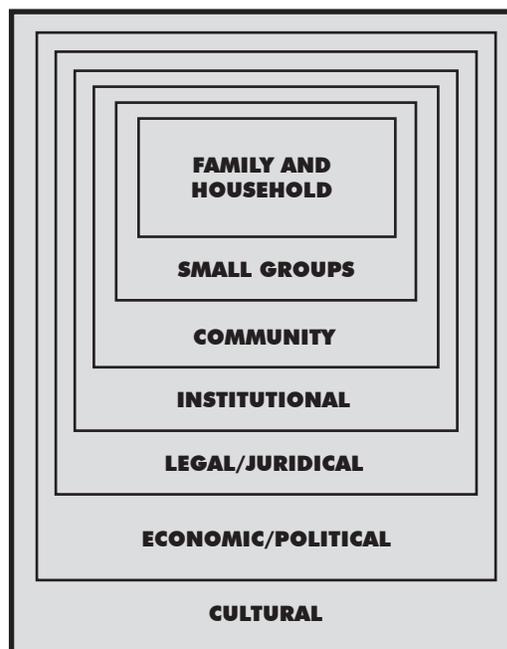
- Contextual Analysis of Gender and Social and Economic Issues
- Contextual Analysis Diagram
- Contextual Analysis Matrix (extra copy per person)

## PROCEDURES



### I. INTRODUCTION (10-15 minutes)

Introduce concept of gender analysis, if not done previously.



With use of a flip chart, introduce the concept of Contextual Analysis:

Contextual Analysis examines the social and economic components which make up the development context.

It suggests that constraints to and opportunities for ensuring men's and women's participation lie in an interwoven context of levels of social and economic systems.

An analysis of those constraints and opportunities for action must be conducted in that context, and at each level, in order to define feasible steps toward change.

Although the Peace Corps development projects focus on the family, small group, and community, they operate in the context of the institutional, legal, political, and cultural levels. Constraints at other levels may block successful completion of a project at any other level.

Other agencies and nongovernmental organizations (NGOs) with whom the Peace Corps cooperates may be working for change at other levels.

### Examples:

In Bolivia, training for beekeeping interested both men and women. Both attended the training for awhile and then the women stopped coming. It was assumed they lost interest. However, on closer examination, it was realized that they stopped coming after the beekeeping protective clothing was introduced. The clothing included pants. Culturally, the women were unable or unwilling to wear pants instead of their traditional skirts. Once the issue was determined to be a cultural one, a solution could be found: they put the pants on and wore their skirts on top!

In Lithuania, although women legally could get small business loans, they did not. It was discovered that even though they could get loans, women had to leave one-half of the amount of the loan in the bank as collateral while paying interest on the entire amount of the loan. This was a bureaucratic procedure, not a law.

## II. VIDEO (20 minutes)

We will be exploring various contexts through the use of a video.

As you watch *The Water of Ayole*, please take notes about gender issues that you see or hear. After the video, we will discuss them.

Show the first 15 minutes of the video.

Give participants a few minutes to complete their notes.

## III. GROUP WORK (45 minutes)

Explain the small group work using the top half of the flip chart:

### TASKS

1. Discuss the gender issues each person noted and select one or two to analyze.
2. Use the Contextual Analysis Matrix to further investigate the issues you identified.

Distribute a copy of the “Contextual Analysis Matrix” handout to each person. Together look at the categories across the top of the page:

**ASSUMPTIONS:** What assumptions are you making? Which ones are being made by others?

**CONSTRAINTS:** What are the limitations at various levels of the social and economic system?

**OPPORTUNITIES:** Where might opportunities be?

**FURTHER INFORMATION:** What other information would you need to investigate this issue further?

Have participants pull chairs together into groups of three. Remind them of the order of the tasks, as noted on the flip chart.

Monitor their progress. If they are still discussing issues in general after 30 minutes, ask them to pick one issue and work it through the matrix.

Stop the group work after 45 minutes.

Debrief, using some of the following questions:

1. What was valuable about this exercise?
2. What was difficult?
3. What issue did each group analyze?

Continue to work in your small groups for another 15 minutes on the last part of the task (reveal rest of flip chart):

4. Determine what might be one potential project the Peace Corps could initiate to address some aspect of the situation they just saw.
5. In what contexts (e.g., legal, institutional, familial, cultural) would the problem need to be investigated prior to initiating such a project? Make a list.

In the full group, ask each small group what its potential project might be. If time, allow each to indicate one or more contexts it would need to investigate further.

#### **IV. SUMMARY/TRANSITION** (5 minutes)

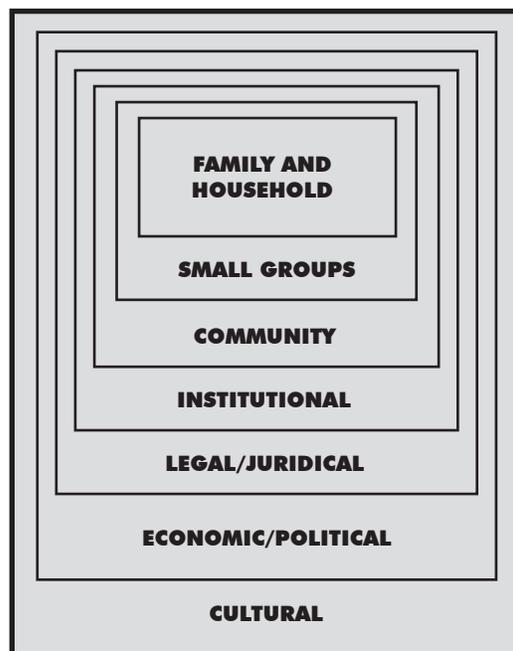
In what ways can this tool be applied? By whom?

Distribute the handout “Contextual Analysis of Gender and Social and Economic Issues.”

# CONTEXTUAL ANALYSIS OF GENDER AND SOCIAL AND ECONOMIC ISSUES

This analysis examines the social and economic components which make up the development context; and is predicated on a history of observation suggesting that constraints to and opportunities for insuring men's and women's participation is an interwoven context of levels of social and economic systems. An analysis of those constraints and opportunities for action must be conducted in that context, and at each level, in order to define feasible steps toward change. Although the Peace Corps' development projects focus on the family, small group, and community, they operate in the context of the institutional, legal, political, and cultural levels.

A development agency, like USAID, which operates at a macro level, might seek to make changes at the institutional, legal, political, and cultural levels, but, nevertheless, cannot ignore the community, small group, and household contexts.



This analysis, simple and straightforward in its application, subjects each of the levels of social and economic systems which are key for gender analysis—identified in the diagram above—to seven investigations, as follows:

- issues at each level which help us to clarify components of an equity problem related to gender, age, ethnicity, or race
- identify assumptions that exist about the problem
- test those assumptions
- specify change needed to achieve development objectives
- articulate specific constraints to change
- define opportunities for change
- develop specific steps for action

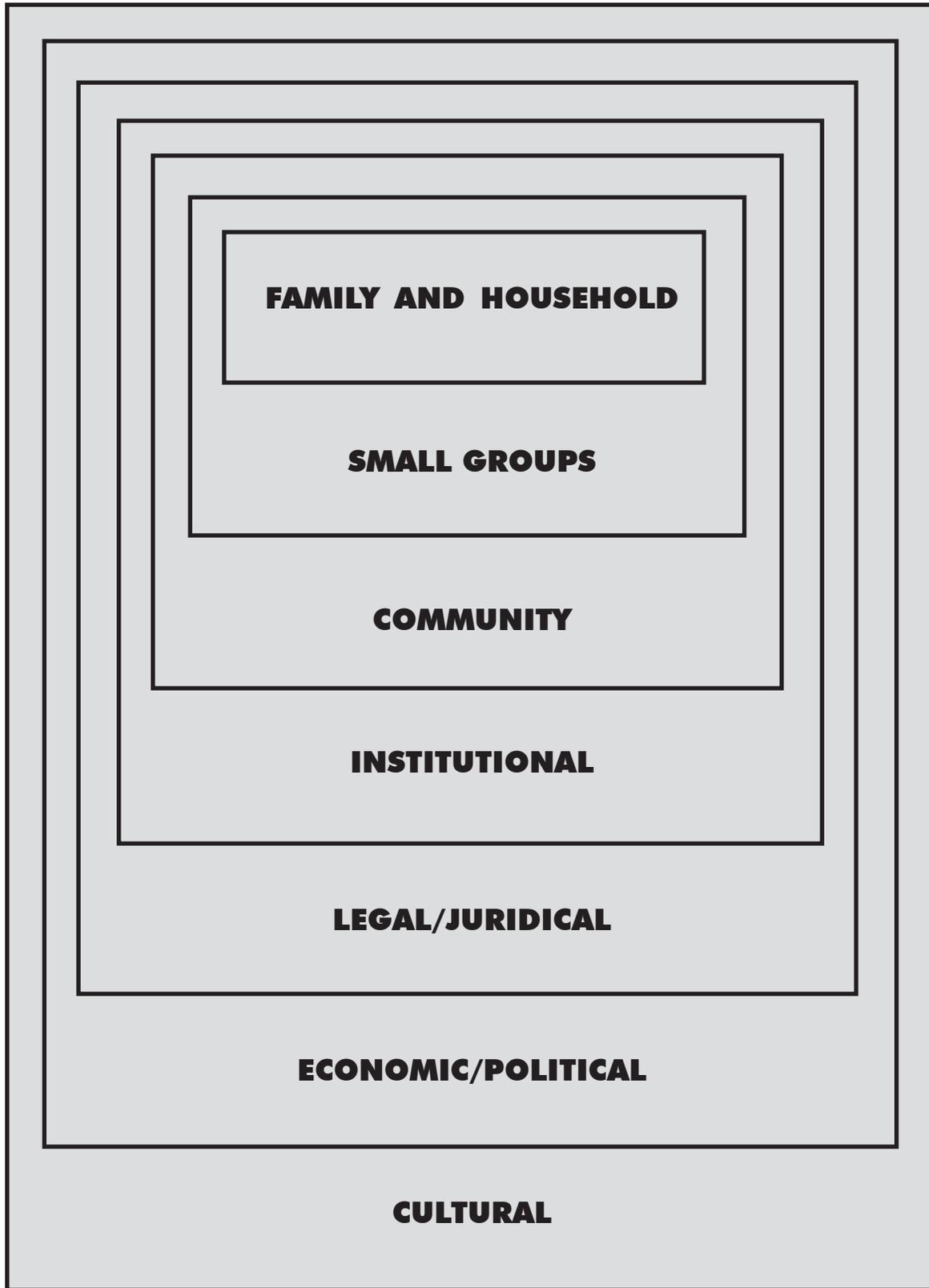
Component aspects to keep in mind as these investigations take place include:

- **CULTURAL** component
  - is dynamic
  - changes slowly over time
  - is usually not a direct intervention target
- **POLITICAL** component
  - may have vested interest in the status quo
  - does not represent all stakeholders
- **LEGAL/JURIDICAL** component
  - is important in policy analysis
  - can be targeted in policy dialogue
  - may be a focus of legal system reform
- **INSTITUTIONAL** component
  - may control access to resources
  - usually implements policy
  - can be an intervention target
- **COMMUNITY** component
  - is often a local gatekeeper
  - influences cultural change
  - is an important target for information
- **SMALL GROUP** component
  - is often an important entry point
  - changes configuration relative to function
  - is an important target for information
  - can identify and implement intervention
- **HOUSEHOLD AND FAMILY** component
  - is important in gender role analysis
  - is dynamic and multidimensional
  - is an important target for information
  - acts in context of other levels of the system \*

\* As is true with all components.

Adapted from materials produced by USAID's GENESYS Project

# CONTEXTUAL ANALYSIS DIAGRAM



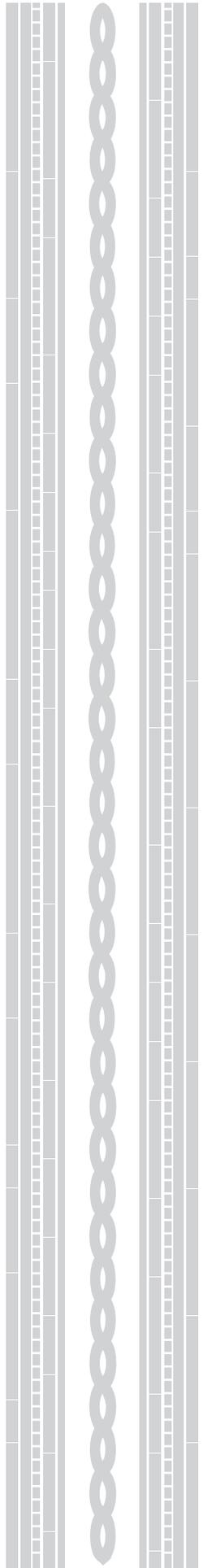
Adapted from USAID's GENESYS Project materials

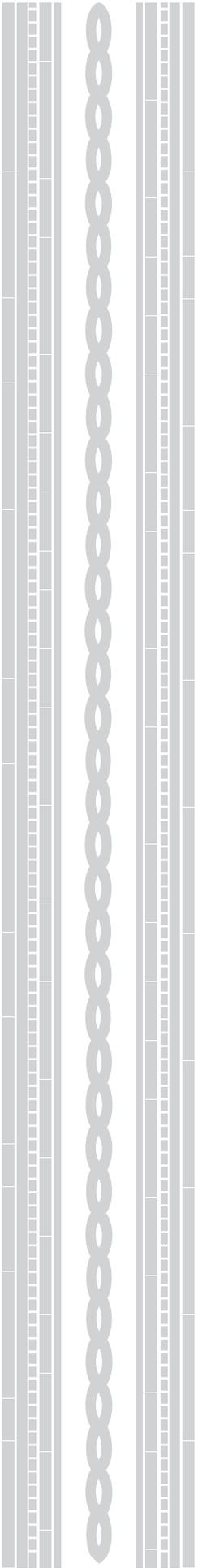
**CONTEXTUAL ANALYSIS MATRIX**

Gender Issues	Assumptions	Constraints (such as cultural, historical, economic, political, legal, institutional, community, familial)	Opportunities	Information Needed

## **SECTION 2: USING PARTICIPATORY APPROACHES**

These two sessions introduce PACA methodology in participatory ways. The sessions highlight key elements of PACA and help participants understand the differences between PACA and other participatory methodologies.





# EXPERIENTIAL INTRODUCTION TO PARTICIPATORY ANALYSIS FOR COMMUNITY ACTION (PACA)

## RATIONALE

Since PACA uses a participatory approach, it is appropriate to introduce the key concepts in a participatory way.



1 1/2 - 2 hours  
(depending on the size of the group)

## GOAL AND OBJECTIVES

### GOAL

To introduce the key elements of PACA in a participatory way.

### OBJECTIVES

1. To engage in a visual presentation of ideas.
2. To reflect on the process to highlight the key elements of PACA.
3. To compare and contrast PACA with other participatory methodologies.

## SESSION OUTLINE

- I. Introduction (5-15 minutes)
- II. The activity (30-45 minutes)
- III. Process the activity (15-20 minutes)
- IV. Parallels with PACA methodologies (30 minutes)
- V. Transition (5 minutes)

## TRAINER PREPARATION

1. Depending on the time and structure of your workshop, determine if this session will be the culmination of the first day, or an introduction to community mapping. If community mapping is used, refer to the specific session plan for that tool so that all elements are included, both in producing the map and in discussing the finished maps.

- Determine how the participants can be divided into groups to present two different views; if possible, include gender grouping.

## MATERIALS



Per group:

- 1 or 2 blank sheets of flip chart paper
- 5-8 colored marking pens, various colors
- Masking tape
- If doing mapping, small pieces of colored paper and tape or glue sticks

## HANDOUT

- Participatory Analysis for Community Action (What is It? Key Elements)

## PROCEDURES



### I. INTRODUCTION (5-15 minutes)

#### Alternative A (culmination of first day's sessions)

To use this session as an evaluation or summary of the first day, begin by reviewing the topics covered over the course of the day, listing them on a flip chart. Then give the group some type of assignment such as,

“Discuss all of the items we have covered and how they might apply to the work you do. Then, in the groups designated, create a visual representation that summarizes your discussion.”

In this case, the small groups should have something in common, such as people who work with youth or adults, in rural or urban areas, younger and older participants, service providers and administrators, etc. If possible, include gender subgroupings within other categories, or, if there is no other distinguishing factors, group by gender.

#### Alternative B (introduction to community mapping)

To introduce the mapping tool, select an area known by all members of the group, such as the community, or a training or work site. Explain they will have an opportunity to draw a map of \_\_\_\_\_. You want them to work in designated groups.

The most basic designation is men and women. Depending upon the group, other designations might be those who live in town versus those who live in the suburbs or other towns, different type of job categories or floors of the office building, age groups, ethnic or nationality groups (if appropriate). Read and follow the community mapping session plan.

### II. THE ACTIVITY (30-45 minutes)

Divide into predetermined groups. Provide supplies and identify work space. Inform each group of the amount of time available.

Monitor groups to make sure they get beyond discussion to drawing. If they have not started drawing before half of the time has elapsed, encourage them to begin drawing.

At the end of the work period, ask each group to post its work where everyone can see it.

### III. PROCESSING THE ACTIVITY (15–20 minutes)

Ask a representative from each group to explain the group's work.

Facilitate discussion among the groups using the following questions:

1. What is different between the visualizations? What is similar? Why might that be?
2. What process did you use to get your drawing done?
3. What did you learn about each other as you discussed and drew?
4. If maps were drawn, discuss the coded items, such as frequency, likes and dislikes, and needs identified. Identify similarities and differences, possible reasons for them.

### IV. PARALLELS WITH PACA METHODOLOGY (30 minutes)

Ask the participants to reconstruct the exercise they just completed by listing the steps on a flip chart.

Then ask:

What is your previous experience with participatory methods? Have any of you used rural rapid appraisal (RRA) or participatory rural appraisal (PRA)? If so, how did you use the techniques? (Get examples of purpose and how it was done. Often techniques are called, or thought to be, participatory when in fact it is the outsider making all the judgments and conclusions. Take participants' examples without making judgments about them.)

Distribute the handout "Participatory Analysis for Community Action" and clarify any points not previously covered, especially:

- The purpose of PACA is to lay the groundwork for the community to determine its own needs and what it wants to address.
- The development worker establishes a partnership to assist the community to determine what it wants, not what is dictated from outside.
- To insure all voices are heard, the larger group is subdivided into smaller groups.

Ask:

What are the differences between this approach and ones you have used before? (These may include formulating assessment based on development workers' perceptions without even asking questions directly of community members, or asking specific questions and analyzing the data oneself. If community members were engaged in conversation, they may have been a few community leaders, often men only, or other configurations that limited the scope of the information gained. The biggest difference should be that the PACA methodology has the outsider facilitating representative groups within the community's own assessment of their reality.)

PACA presents gender-sensitive tools to the community, then seeks to encourage the community to expropriate the information that results from the use of the tools as its own. Ideally, at this point, the tool (activity) becomes a tool of empowerment, and the community assumes the responsibility for action on the information as its own.

**V. TRANSITION** (5 minutes)

Make an appropriate transition to next activity.

Next activities may include practice in the skills needed to carry out the tools: interviewing, observation, facilitation, and the introduction to and practice in doing each technique.)

**NOTES**



# PARTICIPATORY ANALYSIS FOR COMMUNITY ACTION (PACA)

## WHAT IS PACA?

It is a methodology designed to communicate information, identify needs, and lay the groundwork for community action to solve problems. It facilitates the development of an effective and open partnership between the development agents and the representative segments of the local community to design, implement, and evaluate development programs.

## WHERE IS PACA USED?

It is implemented in the local communities, in neighborhoods, in organizations, and in households where the targeted population resides.

## WHO USES PACA?

Development agents, such as Peace Corps associate directors, Volunteers, local counterparts, and community members.

## HOW IS PACA CARRIED OUT?

PACA relies on the active and full participation of the local community with the development agent **eliciting a partnership** rather than imposing an agenda. PACA methods may be used in various phases of community action: analysis, identification of projects, determination of indicators, monitoring, and evaluation. The analysis part of the process may be relatively rapid, involving one or more visits to a community. The development of community action, monitoring and evaluation will take longer and may be the focus of a development worker's assignment over several years.

## KEY ELEMENTS OF PACA

- Interviewing separate groups of the community, e.g., men and women, youth and adults
- Facilitating their discussion in small and large groups
- Formatting their ideas visually
- Helping them compare and contrast their own perceptions, e.g., as men and women
- Using their own analysis for project design, site selection

or

- Facilitating their own community action

# PACA GALLERY

## RATIONALE

The participatory analysis for community action methodologies that the Peace Corps has developed to ensure the inclusion of women in analysis and activity planning is a very important part of the gender and development approach. Participating in the use of one of the tools makes an indelible impression on training participants. However, time limitations sometimes make it infeasible to schedule a participatory activity that resembles PACA methodologies in the training room, let alone do field work. However, some of the feeling of the participatory nature and the impact of the information gained can be revealed through a combination of description, photos, and samples of products from the field.

## TIME



1/2 to 1 hour

## GOAL AND OBJECTIVES

### GOAL

To understand PACA methodology, the types of information revealed, and the potential impact of the processes involved.

### OBJECTIVES

1. To identify the key elements of PACA methodologies.
2. To see the types of information revealed.

## TRAINER PREPARATION



1. Collect some examples of PACA work in the field:
  - Borrow originals, or make copies of, maps, seasonal calendars, daily activities.
  - Take or request photos and slides from actual field work.
  - If appropriate, video some groups involved in the activities.  
If no field examples are available, examples from staff or Volunteer training programs can be used.
2. Mount photos on flip charts with headings or brief descriptions.
3. If slides are used, arranged in carousels.
4. Prior to the session, post examples and photos on the walls of the training room. Set up slides and video, if used. (This may take more time than anticipated. Allow at least 30 minutes to set up for this session.)

## MATERIALS



- Large sample maps, calendars, daily activities from field work or training sessions
- Photos, slides or videos
- Slide projector, VCR and monitor, if needed

## HANDOUT

- What is PACA?

## PROCEDURE



Several different procedures may be followed, depending on the amount of time, depth of knowledge expected, and materials on hand. Videos or slides using an automatic changer can be shown to one side as you introduce the session. They can also be started just as participants begin to move about the room.

Several scenarios are described below.

### Option A:

1. Explain what PACA is, using the “What is PACA?” handout.
2. Describe one or more settings where it has been used. If wall examples are from one particular place, describe that setting in detail.
3. Using the samples on the walls as visuals, describe each of the techniques that were used, and some of the results that can be seen.
4. Have participants walk around and look at the samples.
5. Answer questions informally, or bring group back together for questions and answers.

### Option B:

At the end the introductory session “WID, GAD, and PACA,” at a break, or at the close of the day’s training, participants can be invited to circulate and look at the examples.

### Option C:

Have room set up with examples and slides or videos running as training participants enter the room. Encourage them to take the first fifteen minutes to read and look at the samples. In this scenario, you might have more written material on the walls to explain the sites or training situations reflected and the steps in conducting the participatory tools of those you have examples. Allow for some time for questions about the display in your training schedule.

# PARTICIPATORY ANALYSIS FOR COMMUNITY ACTION (PACA)

## WHAT IS PACA?

It is a methodology designed to communicate information, identify needs, and lay the groundwork for community action to solve problems. It facilitates the development of an effective and open partnership between the development agents and the representative segments of the local community to design, implement, and evaluate development programs.

## WHERE IS PACA USED?

It is implemented in the local communities, in neighborhoods, in organizations, and in households where the targeted population resides.

## WHO USES PACA?

Development agents, such as associate Peace Corps directors, Volunteers, local counterparts, and community members.

## HOW IS PACA CARRIED OUT?

PACA relies on the active and full participation of the local community with the development agent **eliciting a partnership** rather than imposing an agenda. PACA methods may be used in various phases of community action: analysis, identification of projects, determination of indicators, monitoring, and evaluation. The analysis part of the process may be relatively rapid, involving one or more visits to a community. The development of community action, monitoring, and evaluation will take longer and may be the focus of a development worker's assignment over several years.

## KEY ELEMENTS OF PACA

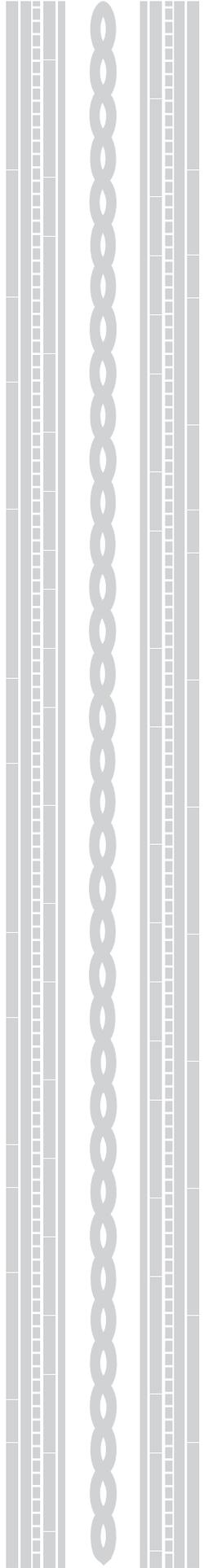
- Interviewing separate groups of the community, e.g. men and women, youth and adults
- Facilitating their discussion in small and large groups
- Formatting their ideas visually
- Helping them compare and contrast their own perceptions, e.g. as men and women
- Using their own analysis for project design, site selection

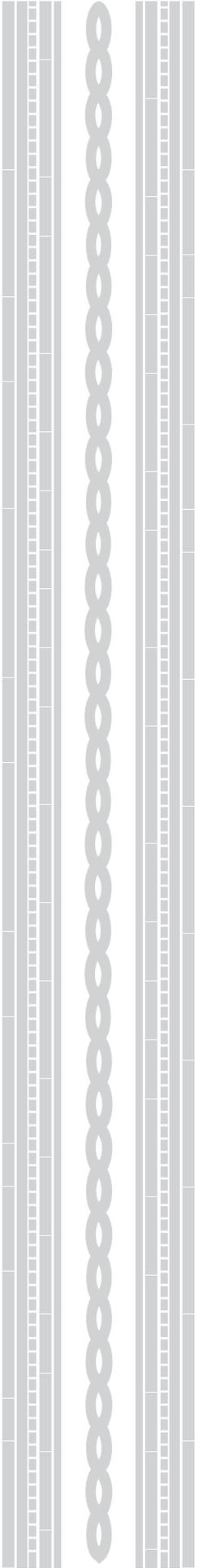
or

- Facilitating their own community action

## **SECTION 3: BASIC SKILLS**

Fundamental to learning about others and building relationships are good skills in observation, interviewing, and facilitation. GAD and PACA methodologies cannot be carried out without them. In new cultural settings, old skills need to be revisited, cultural assumptions challenged, and new culturally appropriate language and behaviors learned. The three session plans that teach skills in these areas are designed to be modified to fit each culture's practices and norms.





# SKILLS TRAINING - OBSERVATION

## RATIONALE

The PACA techniques are successful only to the degree that they can be skillfully used. Skills required are culturally appropriate (1) interviewing and (2) facilitation, and accurate (3) observation. Observation is important in the richness of the data that can be gathered unintrusively, the confirmation or questioning of information gained verbally, and the clues to reliability and comfort of community members who are involved in PACA techniques.

This session, as all of the skills training sessions, should be modified and made culturally appropriate by working with language and cross-cultural trainers. As language skills permit, trainees should be encouraged to record and describe their observations in the host language.

This design is most appropriate for pre-service training (PST). However, the major points should be reviewed when PACA tools are introduced at any time.

## TIME



1 1/2 hours

Several additional time periods, depending on how much practice is planned (see Section IV).

## GOAL AND OBJECTIVES

### GOAL

To see the importance, and difficulty, of objective observation which can add to, confirm, or question verbal information received in community work.

### OBJECTIVES

1. To identify influences on one's perceptions.
2. To practice nonjudgmental statements about observations.
3. To sharpen observation skills of community resources and infrastructure, current forms of activity, and labor by gender and age.

## SESSION OUTLINE

- I. Introduction (30 minutes)
- II. Filters (40 minutes)
- III. Balancing for filters (20 minutes)
- IV. Suggested observation practice opportunities (1-2 hours, throughout training)

## TRAINER PREPARATION

Review this session plan with language instructors and cross-cultural trainers.

1. Modify any parts that are inappropriate in the host culture.
2. Determine which video segment will be used in the introduction; if none of these tapes appeal to you or you don't have access to them, replace them with a similar length clip from a video you prefer.

At one time or another, most posts have received copies of the following video tapes. Short segments from each tape have been identified and described for possible use in this training session. A short segment of any other video available can be used. The important aspects of the video clip are that a number of things are occurring at the same time or in close sequence, and that both men and women are involved.

The number cues are based on 0000 when the video starts, not from the title. Watch the clips from the videos that you have. Determine which you will use and make your own notes for the session.

Be sure to cue the video in advance of the session; use the numbers as well as the description, as numbering systems may vary by machine.

Possible video segments include:

### ROAD TO LAMESEN

- |                   |   |
|-------------------|---|
| <b>#0000-0060</b> | A variety of scenes: man painting face, group singing and playing instruments, market scene, city street.<br><b>Observables:</b> roles of men, women, and children; dress; activities   |
| <b>#0264-0360</b> | Village gathering, faces singled out; walking through village; outsiders interviewing villagers.<br><b>Observables:</b> faces, clothing, roles, housing, outdoor furniture.<br>(There is some superscript but it can be ignored.) |
| <b>#0480-0581</b> | School room (children, adults), nonformal education, clinic.<br><b>Observables:</b> clothes, faces, roles   |
| <b>#0620-0680</b> | Village gathering: singing, playing instruments, local theater.<br><b>Observables:</b> roles, dress, what is happening  |

### THE WATER OF AYOLE

- |                   |  |
|-------------------|--|
| <b>#0159-0117</b> | Getting water at river.<br><b>Observables:</b> roles (gender, ages), dress, equipment                                  |
| <b>#0656-0670</b> | Celebration.<br><b>Observables:</b> Who is dancing, playing instruments; what instruments there are; dress and jewelry |

- #0790-0846 Meeting.  
**Observables:** Who is there and speaking, behaviors (standing, raising hands)  
 (There are some subscripts but can be ignored.)
- #0965-0993 Construction of building: making cement, bricks, carrying water.  
**Observables:** tasks (gender, age); dress; tools

## GENDER ANALYSIS

- Determine culturally appropriate ways to practice observation skills in the community or host family.

Meet with other pre-service training staff to determine how and when this session, in whole or in part, might be introduced, and when participants can practice the skills. It is recommended that it be introduced very early, even the first week, as it has major cross-cultural implications, and trainees start observing, and making judgments on those observations, immediately in an effort to learn about, and understand, their host country.

Consider having several trainers for this session, including at least one language or cross-cultural trainer.

The practice sections, or others you create, can take place throughout the training; all of the practice should not directly follow the instruction. As language skills permit, encourage trainees to record and describe their observations in the host language.

## MATERIALS



- Blank flip chart paper
- Markers
- Tape
- Video player and TV
- Video: *The Water of Ayole, The Road to Lamesen*, or other of your choice (*Peace Corps Digitized Training Resources*, Vol. 1 [ICE No. RE042] — no longer in production). Contact [iceorders@peacecorps.gov](mailto:iceorders@peacecorps.gov), if you do not have a copy at post.

## HANDOUTS

- Filters

## FLIP CHART

- Filters (chart and rectangles of colored paper with the following words written to attach: life experiences, culture, respect, self-image, religion, prejudice, biases, background, trust, parents, sex and gender roles, likes and dislikes)

# PROCEDURE

## I. INTRODUCTION (30 minutes)

Explain:

This session will focus on observation skills we need to develop. You have already done lots of observation in the time you have been in this country. Let's see how we can improve the quality of what you learn from observations.

Introduce the video segment:

We are going to watch about five minutes of a video. I would like for you just to watch. After we watch the segment, I'll give you a little time to make a few notes on what you saw.

(Start the video selected during trainer preparation at the indicated number. After the video segment, give participants a few minutes to write down what they saw.)

Explain:

Now please pull your chairs together in groups of five or six. Talk with each other about what you saw, and prepare a list on a flip chart to share with the whole group. You will have 15 minutes to complete this task.

(After 15 minutes, have all flip charts brought to the front and posted. Have one group read quickly through its list. Have each other group add only items not previously mentioned.)

Ask:

In your small group discussions and from these lists, do you find things that you observed and others didn't? Or items other people noted that you did not see at all? If so, what were they?

Why do you think this happened? (Note reasons on a blank flip chart.)

Explain:

We will be studying in more depth how our observations are colored, and how we can work to become aware of more things going on around us that perhaps now would go unnoticed.

## II. FILTERS (40 minutes)

Explain:

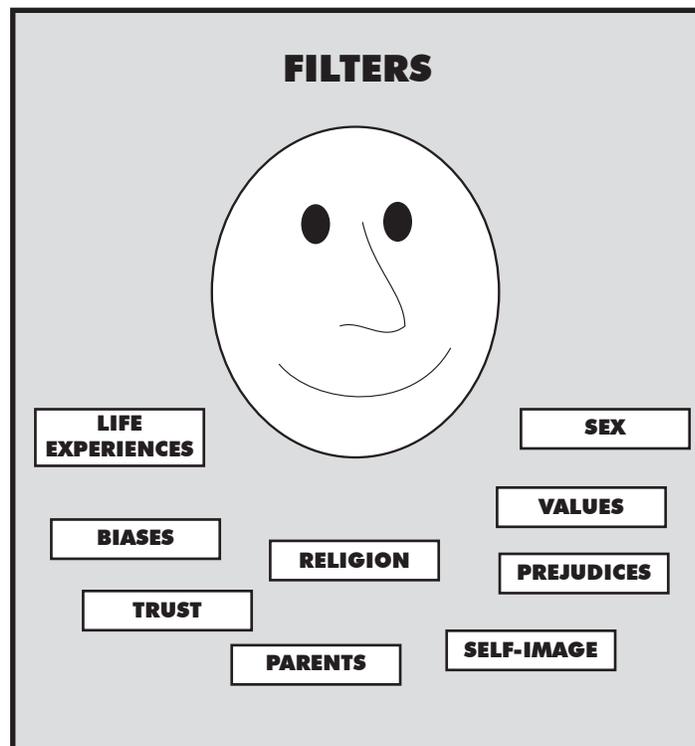
As we have just seen, because we are all human beings, all raised differently, we do not all perceive information (receive messages) the same way. For instance, if a car backfires, one man may perceive it as a backfire. Another man may perceive it as a gunshot, because he was in a war. One person may see the killing of a pretty song bird as a cruel act against a pet; another may see it as procuring a meal.

Filters are biases, values, or beliefs that influence the way we see something. They come from the concepts we learned in childhood and have acquired over the years through experience. Filters shape our perceptions of how and what we see, what people say and do, how we choose to participate, and our choices about whom to ask questions of and listen to. Many of our filters are determined by our culture or subculture(s). Others are individual values or tastes.

Filtering is automatic and will go unnoticed unless we make an effort to understand it. It is important to understand our filters because they may cause us to distort information, miss

seeing things, or interpret things differently than they were intended. Some filters are very positive, such as believing everyone is trustworthy. In order not to let our filters interfere with our cross-cultural learning and interactions, we need to identify what our filters are. Then, if overly positive, we need to question their situational applicability, or if overly negative, consciously try to overcome them.

(Use the flip chart “Filters” and the colored paper with topics on them to give examples. If possible, get examples from the group. Most likely, they will have examples of some of these points from the exercise in the Introduction to this session. As topics are mentioned, affix the label over part of the face.)



Samples of filters are:

- **LIFE EXPERIENCES:** what you have gone through, e.g., the example of the man and the backfire.
- **CULTURE:** the norms with which you were raised, e.g., if a certain culture teaches that cleanliness is next to godliness, a person from that culture may have a very strong reaction to another culture where sanitation standards are not high. That same person may tend to listen more carefully to someone who is neatly dressed as opposed to someone who appears unkempt and sloppy.
- **RESPECT:** those whom you are taught to respect and how you respect them, e.g., if a person is taught to respect elders she or he may respond to and listen to someone who is elderly, and show a good deal of courtesy even if what that person says is irrelevant to the listener.
- **SELF-IMAGE:** how you perceive yourself, e.g., a low self-image or too high a self-image may hinder a person's ability to perceive objectively what is going on around him or her.

- **RELIGION:** the norms your religion teaches you, e.g., a person who is taught the golden rule or “do unto others as you would have them do unto you” might approach the world differently from someone who believes “an eye for an eye.”
- **PREJUDICE:** the races, ethnic groups, and social groups you are prejudiced for or against, e.g., a person who is taught that a certain race is lazy or crafty might have difficulty dealing objectively with a person of that race.
- **BIASES:** the things you have a predilection for or against, e.g., a person may be biased towards others like herself or himself who are young and take risks, and therefore may easily communicate with these kinds of people. On the other hand, the same person might have a bias against older, more conservative individuals, and thus have more difficulty in viewing or communicating with them objectively.
- **BACKGROUND:** where, how, and with what groups you were raised, e.g., a person from a very small town might have preconceived notions about large towns or people from the city. There are certain barriers established even before communication is initiated.
- **TRUST:** whom you learned to trust as a child. The things you learned affect who you will and will not trust as an adult. For example, you may have learned it is a sign of dishonesty not to look someone in the eyes, or that certain people in certain occupations are untrustworthy.
- **PARENTS:** you were taught many things by your parents, such as how to be polite. You may therefore be drawn to people who demonstrate your idea of politeness (speech, behavior). You might have a strong negative reaction to a person or culture you perceive as rude.
- **SEX AND GENDER ROLES:** the way you react to sexes and gender roles, such as not thinking very highly of a woman who is a mechanical engineer if you think women should work in “gentler occupations” such as teaching. Also, how you perceive the world based on your sex. There is a significant amount of research showing that men and women see things differently.
- **LIKES AND DISLIKES:** if you like something or someone, you will tend to respond favorably, and vice versa.

Ask:

Can you think of other filters? (Add them to the flip chart.)

Distribute the handout “Filters.” Ask participants to review the handout and make notes about any filters they know they have.

### III. BALANCING FOR FILTERS (20 minutes)

Ask:

What are some examples of observations you made in the first exercise that show evidence of filters? (These probably include interpretation or judgments.) List them on a flip chart.

How can we identify statements that show bias, or interpretation? (The words describing the event include judgments or assign values.)

One way to address our filters is to rewrite to eliminate our interpretation. That is, to try and state what happened as objectively as possible. (Work on several of the statements listed until they are objectively stated.)

Example, (take from the video)

Another is to look at our objective statements, and think of more than one possible interpretation. This forces us to be conscious of other frames of reference than the one we hold.

Example, (take from the video)

Take the examples given from the earlier exercise and ask participants to think of possible explanations for the behaviors noted.

#### **IV. SUGGESTED OBSERVATION PRACTICE OPPORTUNITIES**

(1-2 hours throughout training)

Planned opportunities to observe, describe, and discuss should be built into the training program as time permits. Learning to become more objective and open with observations is a skill that needs practice and reinforcement. Wherever possible, include focus on gender roles.

Some opportunities may include the following:

##### **1. In the classroom:**

Repeat the first exercise with another video segment; have the participants work in pairs to review their observations, rewrite statements to make them objective, and explore several possibilities for the actions they observed.

##### **2. In their host families:**

- a. Have trainees observe specific times: for example, meal times, other “family” times, mornings before people leave for work or school. (Caution against taking notes if that would be inappropriate.)
- b. Observe activities of specific family members at various times: mother, children of various ages, grandparents.
- c. Observe and describe how typical household chores are done: washing clothes, cleaning house, meal preparation.

##### **3. In the community:**

- a. Neighborhood streets at different times of day, evening, weekends.
- b. Community places: markets, bus or taxi stands, churches, restaurants, etc.
- c. At a worksite typical for their job with the Peace Corps: who is there, what are the tasks, the time schedule, etc.

## REFERENCES



1. *Nonformal Education Manual*, pages 25-28, [ICE No. M0042].
2. *Roles of the Volunteer in Development* [ICE No. T0005].

## NOTES



## FILTERS

No two people perceive the same external stimuli in the same way. Filters are what make us perceive information differently; we all have them.

Filters are biases, values, or beliefs that influence the way we see something. They come from the concepts we learned in childhood and have acquired over the years through experience. Filters shape our perceptions of how and what we see, what people say and do, how we choose to participate, and our choices about whom to ask questions of and listen to. Many of our filters are determined by our culture or subculture(s). Others are individual values or taste.

Filtering is automatic and will go unnoticed unless we make an effort to understand it. It is important to understand our filters because they may cause us to distort information, miss seeing things, or interpret things differently than they were intended. Some filters are very positive, such as believing everyone is trustworthy. In order not to let our filters interfere with our cross-cultural learning and interactions, we need to identify what our filters are. Then, if overly positive, we need to question their situational applicability, or if overly negative, consciously try to overcome them.

Samples of filters are:

- **LIFE EXPERIENCES:** what you have gone through.
- **CULTURE:** the norms with which you were raised.
- **RESPECT:** whom you are taught to respect and how you respect them.
- **SELF-IMAGE:** how you perceive yourself.
- **RELIGION:** the norms your religion teaches you.
- **PREJUDICE:** the races, ethnic groups, social, and other groups you are prejudiced for or against.
- **BIASES:** the things you have a predilection for or against.
- **BACKGROUND:** where, how, and with what groups you were raised.
- **TRUST:** whom you learned to trust and distrust as a child.
- **PARENTS:** the many things you were taught by your parents.
- **SEX AND GENDER ROLES:** the way you react to sexes and gender roles; how you perceive the world based on your sex.
- **LIKES AND DISLIKES:** your personal likes and dislikes.

# SKILLS TRAINING – INTERVIEWING

## RATIONALE

The PACA techniques are successful only to the degree that they can be skillfully used. Skills required are culturally appropriate (1) interviewing and (2) facilitation, and (3) accurate observation. Though interviewing individuals is not part of PACA techniques, the interviewing skills of building rapport, appropriate question forms, and showing respect for the interviewee are just as critical for successful group discussions (which might be considered “group interviews” in some ways) as for individual interviews.

This session, as all of the skills sessions, should be modified and made culturally appropriate by working with language and cross-cultural trainers. The skills should be introduced and practiced in English, if necessary, but also practiced in the host country language as soon as possible.

This design is most appropriate for pre-service training (PST). However, the major points should be reviewed when PACA tools are introduced at any time.



2 hours for session

Several additional time periods during training, depending on how much practice is planned (see Section V).

## GOALS AND OBJECTIVES

### GOAL 1

To learn culturally appropriate ways to establish rapport and ask questions.

### OBJECTIVES

1. To identify appropriate and inappropriate statements and questions that help to establish rapport with host country people.
2. To use several indirect question structures.
3. To use open-ended questions.
4. To interview several host country people to practice the isolated skills.

### GOAL 2

As able, to conduct short interviews in the host country language.

## SESSION OUTLINE

- I. Introduction (15 minutes)
- II. Essential parts of interviewing (30 minutes)
- III. Question structures (30 minutes)
- IV. Practice in groups (45 minutes)
- V. Individual practice interviews (1-3 hours, throughout training)

## TRAINER PREPARATION



Review this session plan with language instructors and cross-cultural trainers.

1. Modify any parts that are inappropriate in the host culture.
2. Determine culturally appropriate rapport building, language structures, and topics.
3. Determine culturally appropriate ways to practice interviewing skills at the training site or in host families.

Meet with other pre-service training staff to determine how and when this session, in whole or in part, might be introduced, and when participants can practice the skills. It is recommended that it be introduced very early, even the first week, as it has major cross-cultural implications, and trainees will start asking questions immediately to learn more about their host country.

Consider having several trainers for this session, including at least one language or cross-cultural trainer.

The practice sections, or others you create, can take place throughout training; all of the practice should not directly follow the instruction. As language skills permit, revisit parts of the session, teaching the question structures in the foreign language and doing practice in that language.

Look for as many opportunities as possible within different phases of training (cross-cultural, technical, language, personal safety, etc.) to give practice in interviewing with feedback.

## MATERIALS



- Blank flip chart paper
- Markers
- Tape

## HANDOUTS

- Essential Characteristics of Interviewing
- Question Structures
- Group Task
- Interview Observation Guide

## FLIP CHARTS

- Essential Characteristics of Interviewing
- Question Structures

### PROCEDURE

#### I. INTRODUCTION (15 minutes)

Do a quick demonstration.

1. Walk up to one or two trainees, introduce yourself (name only) and ask a few questions. Use questions that might seem somewhat invasive if asked by a total stranger, such as “Do you have brothers and sisters? What does your father do? Does your mother work?”
2. Ask trainees who were approached how they felt.
3. Ask trainees who observed how they felt.
4. List their comments on a flip chart.

Ask:

Why do we ask questions? (Answers may include: get specific information, learn more in general about a country and people, establish a relationship by looking for commonalities.)

Explain:

In this session you will be learning about culturally appropriate ways to establish rapport and ask questions.

#### II. ESSENTIAL PARTS OF INTERVIEWING (30 minutes)

State:

Asking questions, or more formally interviewing people, is the form of communication most basic to getting to know people. We use it constantly as we meet new people. If done well, we can

- establish trust;
- create a human bond; and
- begin a partnership between ourselves and those we came to work with.

Ask:

What are the results of inappropriate question asking? (Ideas should have been noted above after the demonstration.)

The skills we need to develop, or make more appropriate in our new setting, for asking questions and interviewing include the following: (flip chart)

## **ESSENTIAL CHARACTERISTICS OF INTERVIEWING**

**Demonstrate respect**

**Develop rapport**

**Use familiar, non-threatening topics**

**Use appropriate, non-threatening question forms**

**Read nonverbals**

**Listen more than you talk**

Distribute the handout “Essential Characteristics of Interviewing.” Encourage trainees to follow along and make notes during the discussion of these points.

Review each of the points in a question-and-answer format, adding appropriate cultural information.

### **1. Demonstrate respect.**

What are some ways you have used to display respect to other people? (Answers may include behavior, dress, use of titles or other polite speech, concern for someone else’s time, etc.)

Are there any specific behaviors or language patterns you have noticed here that are important to showing respect?

(Add others provided by cultural informants.)



### **2. Develop rapport.**

How would you develop rapport with someone at home? (Initial questions or statements, behaviors.)

Here you are an outsider, foreigner. It is important to try to dispel all false or misinterpretable expectations which that status might bring. What are the attitudes towards foreigners here? Do they vary according to where in the country you are? By social classes, gender, age, or ethnic groups?

What are ways to begin to develop rapport through behavior, conversation, and questions that are non-threatening?

(Add notes from cultural informants.)



### 3. Use familiar, non-threatening topics.

In our demonstration, what made you uncomfortable about the topics?

What might have been more appropriate topics for you (for a relative stranger) to ask?

The topics that are familiar and non-threatening differ by cultures and their particular history. Why do you think most Americans begin with the question “What do you do?” (Culturally for most Americans, what one does is how one is known, as opposed to what family they are from. This probably evolved out of a combination of the mobility of most Americans—their family would be unknown—and a conscious effort by many to value someone by his own efforts as opposed to who he is—egalitarianism rather than classism.)

If we need to begin the interview with topics that people enjoy talking about and which neither pose a threat nor break an acceptable cultural level of intimacy, we need to identify those in this cultural context.

(Add appropriate notes below.)



### 4. Use appropriate, non-threatening question forms.

Not all people are comfortable with personal questions, such as “What do you think about the health care in this town?” etc. A less personal question form may be more appropriate, such as “What are people saying about the health care in this town?”

Does the form of a question make a difference to you? Does it depend on the topic?

We will spend much more time on this in the next part of the session.

(Add additional notes below.)



### 5. Read nonverbals.

In our demonstration, were there any nonverbals that the interviewer might have picked up?

What examples of nonverbals have you experienced that gave you a clear message during a conversation or an interview? (Expressions of boredom, discomfort with questions, etc.)

(Add notes on specific nonverbals in this culture that trainees may not recognize.)

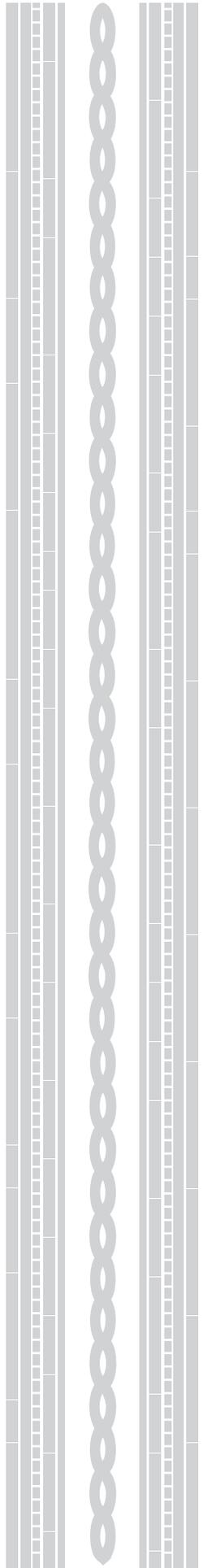


### 6. Listen more than you talk.

How do you feel about silence?

What can you do to keep from “jumping in” with another question when your interviewees may just need some time to think and answer?

(Add any notes on tolerance for silence in this culture.)



**III. QUESTION STRUCTURES** (30 minutes)

Introduce the topic with the flip chart:

**QUESTION STRUCTURES**

**Closed questions: (yes or no)**  
 Do you like to eat goat?  
 Do you use the health clinic?

**Either/or questions:**  
 Do women... or do they... ?  
 Is the clinic free or is there a fee?

**Open questions: (why, what, when, where, how)**  
 What are some foods you like to eat?  
 When might you take your children to the health clinic?

**Personal question forms:**  
 Do you throw your trash in the river?  
 How many children do you have?

**Generalized question forms:**  
 Do people throw trash in the river?  
 How many children do most families have?

Present culturally appropriate question formats, language structures, and when and where they each might be appropriately used, if ever. Though the trainees may need to do this in English, have them learn somewhat equivalent structures, if possible, so that they practice the correct patterns.

Discuss question sequencing:

1. Sometimes starting with yes or no questions is a good way to start a discussion, followed by open questions.
2. If a discussion starts to falter, yes or no questions and either/or questions are a way to get people talking again and summarizing what perspectives have been presented.
3. Sometimes open ended questions can be vague and difficult to answer. It may be necessary to move back to more closed questions.

(Add other notes.)



**IV. PRACTICE IN GROUPS** (45 minutes)

Explain:

To practice what we've been learning, you will work in small groups of three or four persons.

Form that size groups and sit together.

After they have moved, distribute the handout "Group Task," and review it with them.

Together you will do the following:

**GROUP TASK**

1. **Select a topic you think would be interesting and appropriate (in the host country's view) for you to ask about.**
2. **Determine who you might interview about that topic.**
3. **Prepare an outline of how you would conduct the interview about this topic, planning each step from the list of essential characteristics.**
4. **Write your questions to conform with cultural norms. Prepare no more than eight questions.**

You will have 15 minutes to prepare.

Trainers should circulate, keeping groups on task, and giving help if necessary. Host country staff can be particularly helpful in determining cultural appropriateness of what trainees are planning.

After 15 minutes, either have pairs of groups present to each other, or if there are less than five groups, have each group present to all of the rest. They should describe their interview situation and go through the points, including reading their questions.

Discussion of the presentations should focus on how well they addressed the essential characteristics, as well as on the appropriateness of the questions.

## V. INDIVIDUAL PRACTICE INTERVIEWS

### (Suggested Methods and Opportunities)

(1-3 hours, over time)

Opportunities for practice using appropriate behavior, language, and topics for interviewing should be provided throughout training. Trainees need to prepare for practice interviews, have their preparation reviewed, and their interviews debriefed, so that they are learning and improving with each experience. An “Interview Observation Guide” handout is provided for trainee feedback on interview practice.

As trainees are able, they should practice in the language of the host culture.

Some suggested interview situations are the following:

1. In the classroom setting, practice interviews in trios: one interviewer, one interviewee, and one observer. The observer uses the “Interview Observation Guide” handout. At the end of each interview, the observer gives feedback from the form and then gives the interviewer the form. The three change roles and repeat the exercise until each person has had a chance to interview.
2. Practice interviews with host national training staff.
3. Practice interviews with host family members.
4. Practice interviews related to technical area with relevant person.

## REFERENCES



*Nonformal Education Manual*, pages 28-31, [ICE No. M0042].

## NOTES



# **ESSENTIAL CHARACTERISTICS OF INTERVIEWING**

**Demonstrate respect**

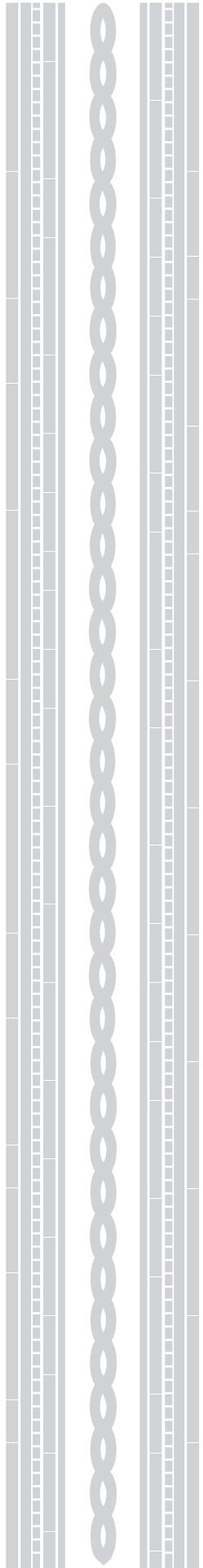
**Develop rapport**

**Use familiar, non-threatening topics**

**Use appropriate, non-threatening question forms**

**Read nonverbals**

**Listen more than you talk**



## QUESTION STRUCTURES

Closed questions: (yes or no)

Do you like to eat goat?

Do you use the health clinic?

Either/or questions:

Do women... or do they... ?

Is the clinic free or is there a fee?

Open questions: (why, what, when, where, how)

What are some foods you like to eat?

When might you take your children to the health clinic?

Personal question forms:

Do you throw *your* trash in the river?

How many children do *you* have?

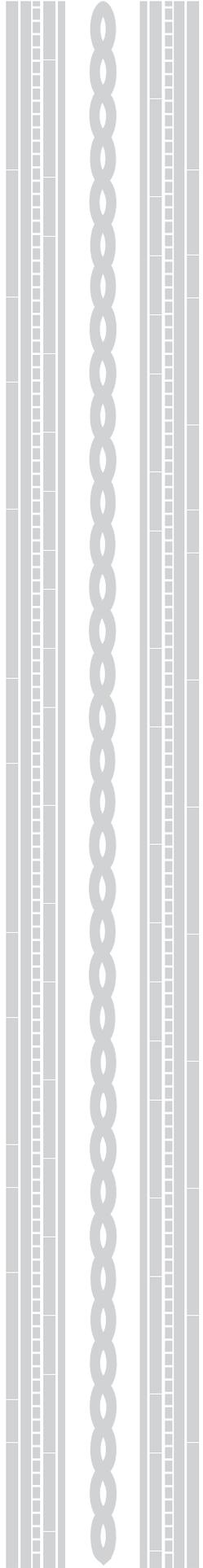
Generalized question forms:

Do *people* throw trash in the river?

How many children do *most families* have?

## **GROUP TASK**

1. Select a topic you think would be interesting and appropriate (in the host country's view) for you to ask about.
2. Determine who you might interview about that topic.
3. Prepare an outline of how you would conduct the interview about this topic, planning each step from the list of essential characteristics.
4. Write your questions to conform with cultural norms. Prepare no more than eight questions.



# INTERVIEW OBSERVATION GUIDE

---

Interviewer: \_\_\_\_\_

Observer: \_\_\_\_\_

Make specific notes (e.g., specific behaviors, questions) related to each topic:

**Rapport:**

**Familiar, non-threatening topics:**

**Question forms:**

**Attention to nonverbals:**

**Listening:**

**Evidence of respect:**

# SKILLS PRACTICE – FACILITATION

## RATIONALE

For Peace Corps Volunteers to be effective, they must be able to communicate with their host country colleagues and community, to establish rapport and trust, and to listen to what people need and want to do for themselves. To be able to facilitate discussions among groups of people is a critical skill; it is the key to using PACA methodologies effectively.

Facilitation is a skill which encourages the members of a group to express and discuss their own ideas. It requires the use of questions that elicit ideas, probe, and encourage everyone to participate and express views. It also requires paraphrasing and summarizing. It demands attention to the process of the group, including encouraging quiet and reticent people, and controlling dominant or disruptive participants. It builds on the skills that were introduced and practiced in the interviewing session.

This session, as all of the skills sessions, should be modified and made culturally appropriate by working with language and cross-cultural trainers. The skills should be introduced and practiced in English, if necessary, but also practiced in the host country language as soon as possible.

This design is most appropriate for pre-service training (PST). However, the major points should be reviewed when PACA tools are introduced at any time.

## TIME



2 hours

Several additional time periods, depending on how much practice is planned (see Section VII).

## GOALS AND OBJECTIVES

### GOAL 1

To learn how to facilitate discussions.

### OBJECTIVES

1. To identify differences or similarities between interviewing and facilitating.
2. To use several phrases that redirect, verify, and summarize ideas raised in a group discussion.
3. To identify types of difficult (non-participating) members of a group and strategies for working with them.
4. To facilitate a discussion among a group of adults.

## GOAL 2

As able, to facilitate short group discussions in the host country language.

## SESSION OUTLINE

- I. Introduction (10 minutes)
- II. The facilitator's role (20 minutes)
- III. Language patterns (10 minutes)
- IV. Practice (30 minutes)
- V. Working with difficult group members (20 minutes)
- VI. Practice working with difficult group members (30 minutes)
- VII. Other practice suggestions and opportunities (4-6 hours, spread out during training)

## TRAINER PREPARATION



Review this session plan with language instructors and cross-cultural trainers.

1. Modify any parts that are inappropriate in the host culture.
2. Determine culturally appropriate rapport building, language structures, and explanations for and ways of handling difficult members of a group.
3. Determine culturally appropriate ways to practice facilitation skills at the training site or with host families.

Meet with other pre-service training staff to determine how and when this session, in whole or in part, might be introduced, and when participants can practice the skills. It should follow the Skills Practice – Interviewing session as it builds on those skills.

If possible, have a host country trainer lead or assist with this session. Every aspect of the material needs to be culturally appropriate, and, as questions arise, a host country informant is the best source of information.

Two practice sections are included in the session. The first is to practice language forms and keep the conversation moving within the group. The second is to practice dealing with difficult group members. Other practice suggestions, or ones you create, can take place throughout training. Look for as many opportunities as possible within different phases of training (cross-cultural, technical, language, personal safety, etc.) to give practice in facilitating. For example, let trainees take turns conducting discussions following small group work and field work, employing facilitation skills.

As language skills permit, revisit parts of the session, teaching the language patterns in the host country language and doing the practice in that language.

# MATERIALS



- Blank flip chart paper
- Markers
- Tape

# HANDOUTS

- Facilitation
- Key Steps in Facilitating a Group
- Facilitation Observation Guide
- Working with Difficult Group Members

# FLIP CHARTS

- Differences between Leading and Facilitating a Discussion
- Language Patterns
- Key Steps in Facilitating a Group

# PROCEDURE



## I. INTRODUCTION (10 minutes)

Explain:

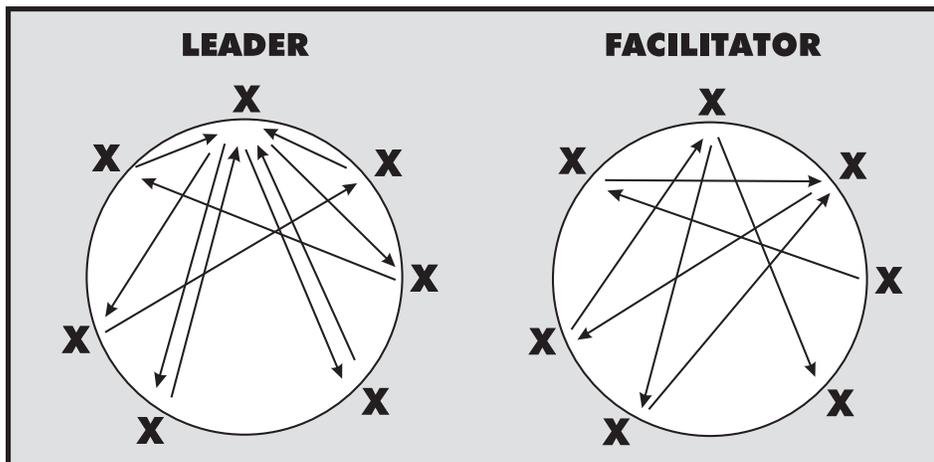
In this session we are going to discuss and work on a very important skill: facilitation.

What does the word “facilitate” bring to your mind? (List on blank flip chart.)

Being able to facilitate discussions will be an important skill for you to have as you begin to work with your community and colleagues. In this session, we will further define how we use the term, why we employ this methodology, and begin to learn how to do it.

## II. THE FACILITATOR’S ROLE (20-30 minutes)

Use the flip chart “Differences between Leading and Facilitating a Discussion” and discuss what each diagram implies and what each leader role would be useful for.



Possible ideas generated by the group may be:

**Leader-centered:**

Introduce new ideas  
Lead through series of steps  
Test knowledge  
Review activity

**Facilitator:**

Help group process own ideas  
Knowledge resides in group  
Manage process, not content  
Encourages all to participate

Ask:

Have any of you had experiences with facilitating group discussions? What were the situations?

When would you lead a group and when would you facilitate?

Explain:

In PACA, both types of group leader styles are used. The leader may direct the group through a series of steps to arrive at information, such as creating a map or a calendar. Then the role changes and a facilitation style is employed because the group has the knowledge; the facilitator helps them discuss it, make comparisons, and draw conclusions.

Distribute the handout “Facilitation” and review the roles the facilitator takes.

### III. LANGUAGE PATTERNS (10 minutes)

Use the flip chart “Language Patterns,” the handout “Facilitation,” and the notes below to discuss the types of questions and phrases that facilitators use.

## LANGUAGE PATTERNS

### 1. Question asking

Open ended: Can you give some examples of ...?

Probing: Will you explain a little more about that?

Moving to other participants: Who has other ideas about this?

Encouraging other points of view: Can anyone provide another point of view about this?

Summarizing: Will someone summarize the points presented so far?

### 2. Paraphrasing

Paraphrase starters:

What I heard you say was ... Is that correct?

I think you said that ... Is that right?

It seems to me your point of view is ... Is that stated correctly?

You differ from (Mary) in that you think ... Is that right?

*(continued on page 87)*

### 3. Summarizing

Starter phrases for summaries:

If I understand, you feel this way about the situation.

There seem to be the following points of view about this.

We seem to have presented the following issues so far.

I think we agree on this decision: what we are saying is that we . . .

### 1. Question asking

Facilitators use questions to help group members bring out relevant information, clarify points of view, summarize information, and draw conclusions.

### 2. Paraphrasing

By paraphrasing, the facilitator demonstrates that she or he understands what participants have said and may clarify issues. The process of paraphrasing is much like catching a ball and throwing it back. It requires very careful listening.

### 3. Summarizing

The purpose of summarizing is to:

- a. pull important ideas, facts, or information together;
- b. establish a basis for further discussion or make a transition;
- c. review progress; or
- d. check for clarity or agreement.

Summarizing requires careful listening as it requires organization and systematic reporting back of information expressed. Summarized information ensures that everyone is clear about what transpired in that portion of the discussion. Whenever possible, encourage someone in the group to do the summarizing.

Ask:

How is facilitating different from interviewing? (Some suggestions may include the following:)

#### **Facilitating:**

Group  
Less directed questions  
Ideas represent group

#### **Interviewing:**

Individuals (usually)  
More specific questions  
Ideas or opinions of one person

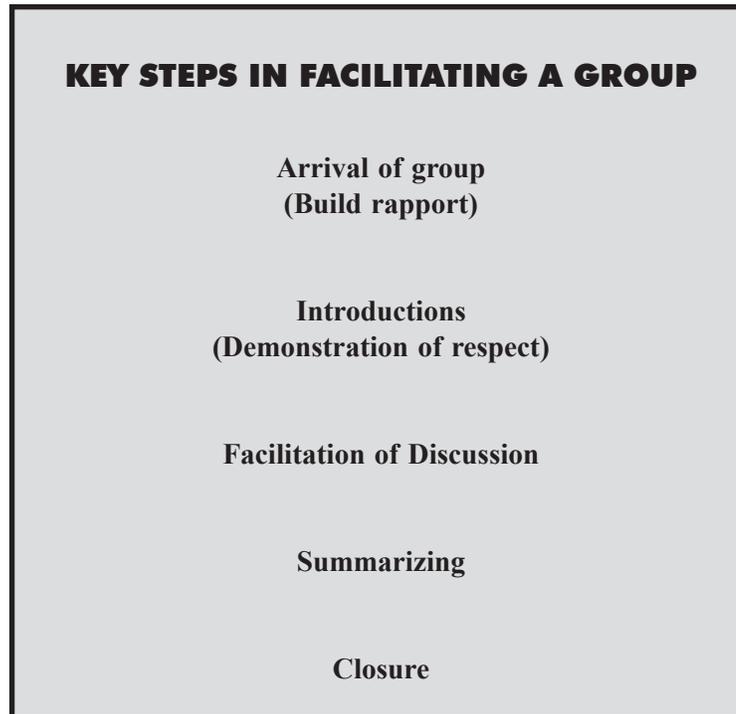
What are some benefits of group discussion when trying to understand other people's reality? Problems?

For you?

For the group?

**IV. PRACTICE** (30 minutes)

Post flip chart and distribute the handout “Key Steps in Facilitating a Group.” Go through the steps.



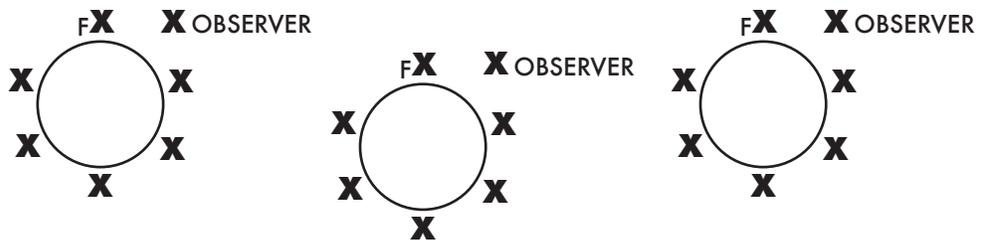
Explain that participants will have a chance to participate in a facilitated discussion.

For the practice, create groups of approximately five participants plus one facilitator and one observer. Ask the participants to divide themselves into groups of seven. Have them pull their chairs together. Ask each group to identify one facilitator and one observer.

Give the facilitators a topic that the groups can easily discuss, such as ways to improve the training site. Let them think through how they will begin.

Ask the observers to meet you at one side of the room. Give them each a copy of the handout “Facilitation Observation Guide.” Go through it with them. Ask them to sit just outside of their group, and make notes as the discussion proceeds. At the end they will lead a discussion with the group about the process, not the content.

The groups will look like the following:



Once the observers are in place, ask the facilitators to begin. After 10 minutes, ask the facilitators to pull the discussion to a close. Then have observers join their groups and discuss how the facilitation met its purpose.

As a total group, discuss what went well and what did not. Ask:

What things were difficult for the facilitators?

How can those things be addressed?

Thank the group and take a break, or end the session here and begin another session with Step V.

## **V. WORKING WITH DIFFICULT GROUP MEMBERS** (20 minutes)

Distribute and review the handout “Working with Difficult Group Members.” If possible, have a host country trainer in this part of the session to be able to answer questions.

## **VI. PRACTICE WORKING WITH DIFFICULT GROUP MEMBERS** (30 minutes)

Repeat the practice set-up from Part IV, using a different discussion question, different facilitators, and different observers. Ask facilitators and observers to leave the room to prepare for a few minutes. When they are gone, assign one or two specific roles to members of each group: someone who is not willing to participate, a dominant or disruptive person.

Conduct the practice with 10 minutes for discussion, 10 minutes of observer-led debriefing, and 10 minutes of general discussion.

Ask one or more participants to summarize the major points about facilitating, including the roles the facilitator plays, important language structures, and rules for dealing with difficult participants.

## **VII. OTHER PRACTICE SUGGESTIONS AND POSSIBILITIES**

(4-6 hours spread throughout training)

Opportunities for practice using appropriate facilitation behavior and language should be provided throughout training. In each case, the trainees need to prepare for their roles, have an observer, and receive feedback so that they are learning and improving with each experience.

As they are able, trainees should practice in the language of the host culture.

Some suggestions for opportunities include:

1. In the classroom setting:
  - Weekly trainee evaluation and recommendations during training.
  - Language staff or other trainers discussing site, making group decisions.
2. With their host families:
  - Group discussions about culturally appropriate topics, such as the meaning and celebration of holidays.

3. During site visits:

- Group discussion with school children about important things in their lives, at school, etc.

## REFERENCES



*Nonformal Education Manual*, page 14; pages 73-71, [ICE No. M0042].

## NOTES



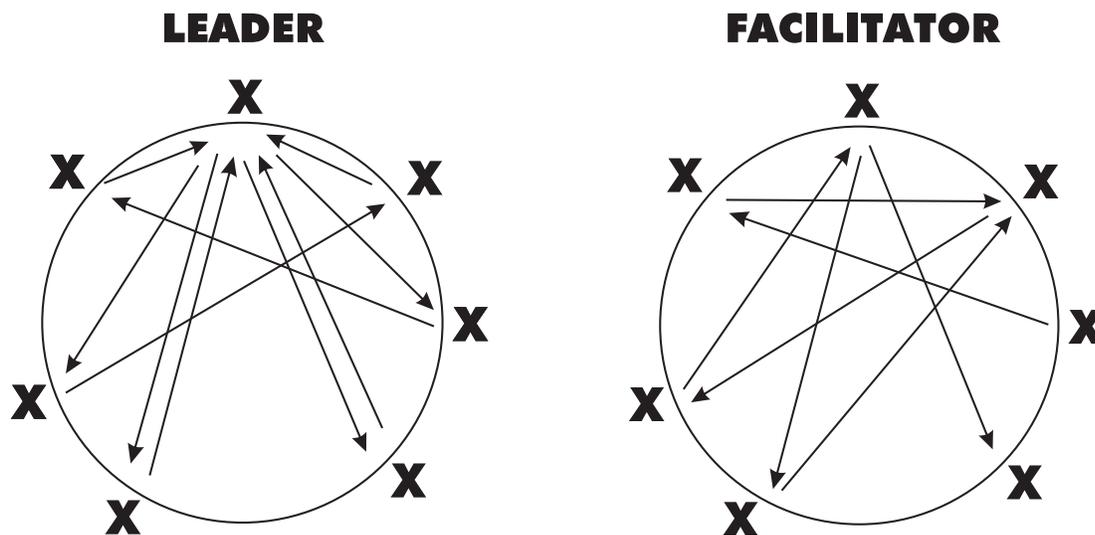
# FACILITATION

Facilitation of a group discussion is a technique that encourages the group to express and discuss its own ideas. The group is the reservoir of knowledge and creativity; the facilitator “serves” the group by building trust, remaining neutral, and not evaluating or contributing her or his own ideas. The role of the facilitator is to encourage the discussion, help clarify when necessary, and assist the group in summarizing its ideas. The facilitator is concerned about the process—what is going on in the group; he or she does not control the content.

Facilitation requires skills in asking questions, paraphrasing, and summarizing. It also demands careful attention to what is happening in the group. The facilitator may need to encourage quiet people, move the conversation away from dominant persons, and deal with disruptive persons.

There is not a prescription for good facilitation. There are rules and descriptions. Skills can be learned and practiced. Then each situation depends on the facilitator’s personality, the situation, and the nature of the people in the group.

The group should do 95 percent of the talking. Facilitators need to be aware of how much they talk. They should not be dominating the conversation, or be a focal point of the conversation. The diagrams below show the difference between controlling and facilitating a conversation.



Facilitators need to tolerate silence. Silence can mean various things: lack of understanding of a question or of the process, confusion, thinking or reflecting, or needing time to translate ideas and language.

Facilitators need to encourage participation by all group members.

“In community gatherings the ‘expectation theory’ often sabotages participation. That is, the poor and uneducated go to meetings with the expectation that the professionals (teachers, principals, city planners, government officials) and other well-educated people will naturally display their verbal prowess and dominate the meeting. Likewise, the latter will expect the minority group to be passive and listen.

It becomes a self-fulfilling prophecy. The same can happen when people from different levels of a hierarchical organization get together.

“Skillful facilitation can greatly broaden the participation in these situations. As the process guide, you [the facilitator] can hold back the highly verbal and aggressive people while you encourage responses from the rest. At first, it’s like pulling teeth, but after a while people will feel more at ease and less shy. What’s more important, as their self-confidence increases, people get used to the reality of participating. Then they begin to expect and demand it.”

from *How to Make Meetings Work*, pages 101-102.

Facilitators need to consider how the group views them. Often, nonverbal behaviors—such as nodding the head negatively, or gesturing toward a point one supports—shows the group the facilitator’s point of view, or what he or she expects from the group.

Specific verbal skills that facilitators need are the following:

### 1. Question asking

Facilitators use questions to help group members bring out relevant information, clarify points of view, summarize information, and draw conclusions. These types of questions are particularly useful:

Open ended: Can you give some examples of ... ?

Probing: Will you explain a little more about that?

Moving to other participants: Who has other ideas about this?

Encouraging other views: Can anyone provide another point of view about this?

Summarizing: Will someone summarize the points presented so far?

### 2. Paraphrasing

By paraphrasing, the facilitator demonstrates that she or he understands what participants have said and may clarify issues. The process of paraphrasing is much like catching a ball and throwing it back. It requires very careful listening.

Paraphrase starters:

What I heard you say was ... Is that correct?

I think you said that ... Is that right?

It seems to me your point of view is ... Is that stated accurately?

You differ from (Mary) in that you think ... Is that right?

### 3. Summarizing

The purpose of summarizing is to:

- pull important ideas, facts, or information together;
- establish a basis for further discussion or make a transition;
- review progress; or
- check for clarity or agreement.

Summarizing requires careful listening as it requires organization and systematic reporting back of information expressed. Summarized information ensures that everyone is clear about what transpired in that portion of the discussion. Wherever possible, encourage someone in the group to do the summarizing.

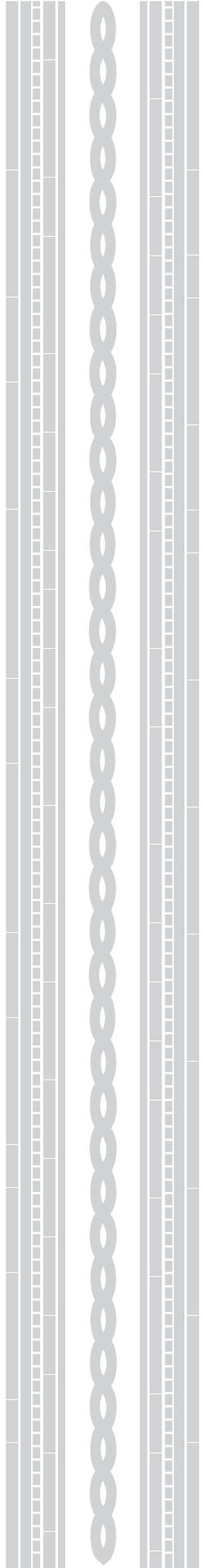
Starter phrases for summaries:

If I understand, you feel this way about the situation.

There seem to be the following points of view about this.

We seem to have presented the following issues so far.

I think we agree on this decision: what we are saying is that we ...



# KEY STEPS IN FACILITATING A GROUP

Arrival of group  
(Build rapport)

Introductions  
(Demonstration of respect)

Facilitation of Discussion

Summarizing

Closure

# FACILITATION OBSERVATION GUIDE

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Facilitator: \_\_\_\_\_

Observer: \_\_\_\_\_

## I. ARRIVAL

- Has seating in circular or other informal configuration.
- Greets people as they enter; develops rapport.

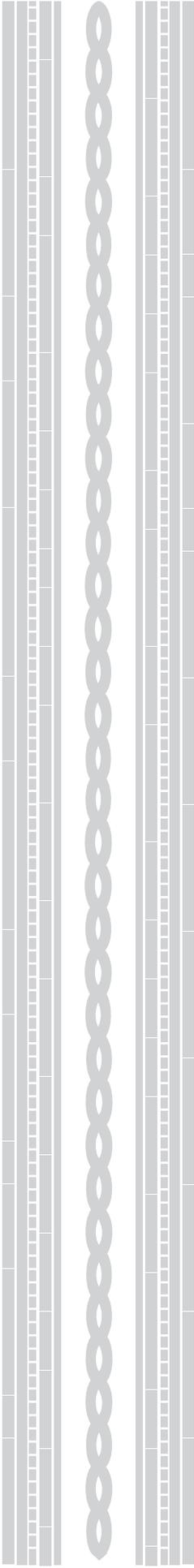
## II. INTRODUCTION

- Formally greets group, thanks them for coming.
- Introduces self.
- Explains purpose of meeting.
- Has participants introduce themselves.

## III. DISCUSSION

- Reinforces that group has knowledge and he or she is there to help.
- Begins discussion with opening question or statement.
- Uses open, probing, redirecting questions. (List specific examples.)

*(continued)*

- 
- Paraphrases. (List specific examples.)
  
  - Encourages quiet members. (List specific examples.)
  
  - Controls dominant members in culturally appropriate ways. (List examples.)
  
  - Handles other difficult participants while maintaining their self-esteem. (List examples.)

#### IV. PULLS DISCUSSION TO CLOSE

- Summarizes, or has participants summarize.
- Asks participants the value of what was done.

#### V. CLOSURE

- Indicates next meeting time and date, or next steps.
- Thanks participants.

Modified from *Promoting Powerful People*, ICE No. T0104

# WORKING WITH DIFFICULT GROUP MEMBERS

Ideally, in a discussion all group members participate equally. Rarely does the ideal happen. The term “difficult” is used to indicate group members that either do not participate or have disruptive or controlling behaviors. It is the facilitator’s role to encourage active and equal participation, working to keep disruptive or controlling behaviors in check so that they do not prevent the group from completing its task(s).

Below are some general guidelines for facilitators to keep in mind as they encounter difficult participants:

**1. Keep in mind the goal.**

- To eliminate or minimize the behavior so that it does not continue to disrupt the group process or isolate some members from participating.

**2. Diagnose accurately; take time to think through.**

- What is the “problem” behavior?
- Why is it happening?

**3. Wait to respond.**

- Give yourself time to assess the situation carefully.
- Give the person a chance to change his or her behavior.
- Give the group a chance to control the behavior themselves.

**4. Care about everyone in the group.**

- Everyone has needs and should be respected.
- Try to address all group members according to what they need.
- Maintain the self-esteem of the person causing the problem by intervening carefully and appropriately.

**5. Take appropriate action and follow-up.**

- Identify possible alternatives.
- Select best alternative to minimize disruption while maintaining everyone’s self-esteem.

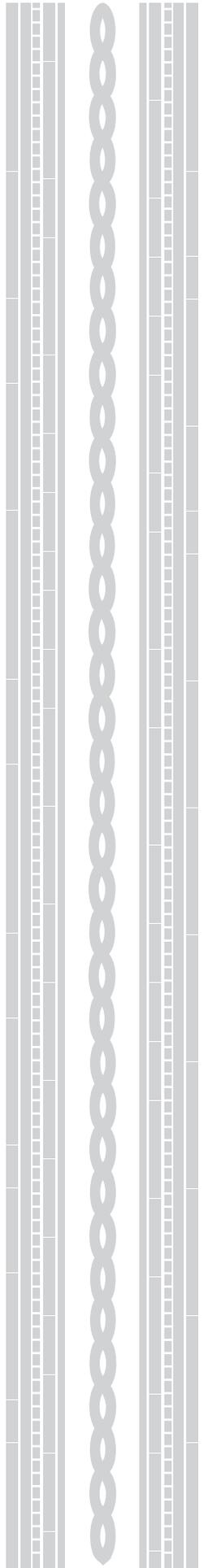
See the following page for descriptions of behaviors and potential actions to alleviate problems.

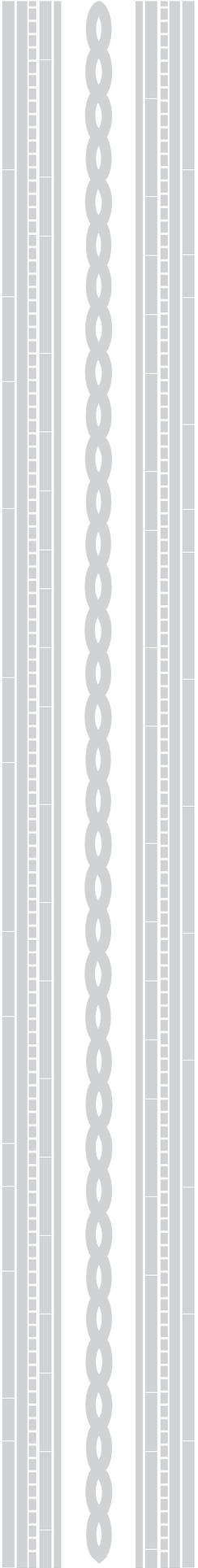
TYPE OF BEHAVIOR	POSSIBLE REASONS	POSSIBLE ACTION OF FACILITATOR
<ul style="list-style-type: none"> <li>• Domineering</li> <li>• Controlling</li> </ul>	<ul style="list-style-type: none"> <li>• Eager</li> <li>• Well-informed</li> <li>• Formal or informal leader in community</li> </ul>	<ul style="list-style-type: none"> <li>• Keep silent; let group respond</li> <li>• Recognize contribution and redirect to someone else</li> <li>• Avoid looking directly at person</li> <li>• Establish a procedure whereby everyone contributes one idea before group discusses</li> <li>• Ask person to summarize ideas so others can contribute</li> </ul>
<ul style="list-style-type: none"> <li>• Argumentative</li> <li>• Uncooperative</li> </ul>	<ul style="list-style-type: none"> <li>• Combative personality</li> <li>• Hidden agenda</li> <li>• Personally upset by some other situation</li> <li>• Threatened</li> <li>• Forced participation</li> </ul>	<ul style="list-style-type: none"> <li>• Find areas of agreement</li> <li>• Direct conversation away from person</li> <li>• Let group handle him or her</li> <li>• Set and reinforce rule that all ideas are acceptable</li> </ul>
<ul style="list-style-type: none"> <li>• Silent</li> </ul>	<ul style="list-style-type: none"> <li>• Timid, insecure</li> <li>• Never given a voice (due to age, gender, social class, ethnic group)</li> <li>• Thinking about content</li> <li>• Insecure about language or needing to translate</li> <li>• Uninterested</li> <li>• Angry, hostile</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage with eye contact or invitation to speak</li> <li>• Speak to privately to find what thinking or feeling</li> <li>• Use ice breakers to make environment more comfortable</li> <li>• Direct questions to this person when he or she has particular expertise or shows nonverbal willingness to speak</li> </ul>
<ul style="list-style-type: none"> <li>• Side conversationalists</li> </ul>	<ul style="list-style-type: none"> <li>• Need to clarify, maybe through translation</li> <li>• Not interested in discussion</li> <li>• Culturally appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Set guidelines at beginning of meeting</li> <li>• Stop meeting and say everyone needs to hear everything</li> <li>• Address needs for translation beforehand</li> <li>• Make sure points are clarified throughout discussion</li> </ul>

## **SECTION 4: PACA TOOLS**

Participatory analysis for community action (PACA) was developed to provide a set of gender-sensitive tools which could facilitate the implementation of an approach where projects and programs are shaped in a participatory process, with voices of the stakeholders themselves shaping the development process itself. It grew out of the many requests for materials which could address, simultaneously, the needs for tools to use in community development, urban and rural appraisal, gender and socioeconomic analysis, and other participatory methodologies.

Four session plans provide classroom practice prior to community work for daily activities, community mapping, seasonal calendars, and needs assessment, and priority ranking.





# COMMUNITY MAPPING

## RATIONALE

Community resource mapping is an effective manner of locating different spheres of activity spatially over the landscape. At the same time, this technique can be adapted to reflect gender differences in regard to the division of labor, the relative importance of different resource areas, and relative levels of integration with institutions outside the community itself. Local populations consistently demonstrate the ability to create graphic representations of their spatial organization, and this technique often provides a highly interactive and pleasant introduction to the community.

This technique is more appropriate to small villages or neighborhoods where there is a clear correspondence between residence and community resources. Large configurations, more than 200 households, are not easily accommodated by this technique. It is also an effective technique to use in work or residential training settings, and classrooms to identify differences in perception, needs, access to power centers, etc. This tool can be used to provide a visual record of the community which can be revisited for the purpose of monitoring and evaluation of a project and changes in the community.

## TIME



1 1/2 hours - 2 hours  
(depending on whether classroom practice is included)

## GOAL AND OBJECTIVES

### GOAL

To introduce participants to the PACA technique of community mapping.

### OBJECTIVES

1. To identify the gender-differentiated use of and access to community resources as well as to the institutions external to the community.
2. To compare gender-differentiated perceptions of the relative importance of and access to different community resources including outside institutions, such as markets, extension services, health clinics, and so forth.
3. To relate the results of this technique to Peace Corps programming, community entry, and project development.

## SESSION OUTLINE

- I. Introduction (10 minutes)
- II. Demonstration of community mapping technique (45 minutes)
- III. Walk through the steps (10 minutes)
- IV. Technique debrief (10 minutes)
- V. Classroom practice [optional] (30 minutes)
- VI. Application (15 minutes)

## TRAINER PREPARATION



This particular technique requires significant skills on the part of the trainer. There is often either a tendency for the local participants to individualize the technique (e.g., only to locate their house on the map) or for one participant to dominate both the crayon and the activity. The trainer must work to assure representative participation and to avoid widespread confusion. Thus a clear introduction to the exercise is critical to its success. Ideally, this activity should be carried out by a “lead” trainer and one or more assistants dispersed among the participants who can facilitate the passage of materials and the participation of different community members.

Read session plan. Study the examples. Locate and read any references. Identify a second trainer to assist with the demonstration.

Prior to the session:

1. Determine how you can have your group consider themselves a community. The easiest situation is if they all live in, or are familiar with, one place, such as the capital city. If it is a large city, delineate the boundaries of their map, perhaps a central part of the city where they would visit government and nongovernment organization (NGO) offices, utilities, banks, markets. If they are from various places but living or meeting at a residential training site, they can map the site. (If necessary, you can have them meet and “create” a common place they can pretend to live. To do this, both men and women need to meet together for 15 minutes or so to outline the geography, demographics, and services of the community. They should not map at this point, just discuss what there is in their community.)
2. Reflect on the gender break-out of the group. If there are not representative groups (not necessarily equal numbers) of men and women, you may use a different manner to determine two groups: rural and urban dwellers, administrators and trainers, host nationals and foreigners, etc.

Determine if you will have trainees practice the technique in the classroom. If so, arrange for some people to come in to be their community, such as training site personnel.

## MATERIALS



This activity can be designed in a number of ways with different requirements for materials. Normally, the activity requires large sheets of paper (newsprint), a number of writing tools, a large table, and some physical items that can represent differing degrees of intensity or importance. Two separate workspaces with the same materials are required. Local materials (seeds, drawing sticks, a patch of dirt, etc.) can also be used in the absence of purchased materials.

- Flip chart paper
- Large markers - several colors
- For relative importance, three sizes of colored circles, one set for each participant
- For frequency, 50 small pieces of three different colored paper
- For likes and dislikes, 20 additional pieces of two other colors than used for frequency
- For needs, two small pads of sticky notes or small squares of paper
- Glue stick
- Scissors
- Tape
- Tacks or pins

## HANDOUTS

- Community Mapping
- PACA Tools: Roles of Facilitators (if doing practice in class)
- Examples of community threeapping exercises from different countries, if desired
  - Ecuador, Men’s Map
  - Ecuador, Women’s Map
  - Paraguay, Women’s Map
  - Paraguay, Men’s Map
  - Poland Map
  - Turkmenistan Map

## FLIP CHART

- Technique Debrief

## PROCEDURES

### I. INTRODUCTION (10 minutes)

Explain:

The community mapping technique which we are introducing combines elements you will find in descriptions of participatory analysis. In addition to drawing maps to show the community, this technique also has community members identify institutions and show the relative importance of things in their community.

This PACA technique can visually show significant gender differences in how members view their community, how they locate different activities spatially, and how they attribute importance to different institutional “sites” such as schools, clinics, markets, extension offices, and so forth. It can also identify how frequently people are at various locations, places they like and dislike, and what they feel is needed or missing in their community. Once this activity has been done, it is very difficult to overlook the differences between men’s and women’s views of the community.

The essential element of this activity is the identification of two community groups—one of men and one of women. Each group does the same activity in separate work spaces.

## II. DEMONSTRATION OF COMMUNITY MAPPING TECHNIQUE (45 minutes)

Introduce the activity as you would in an actual community, by introducing yourself, learning names, setting the tone, etc. Explain that this is an opportunity to participate in a community mapping activity that will be interesting for everyone, and fun as well.

Divide participants into gender groups (or other designations previously determined), each with a work space separate from the other, such as separate sides of the same room or in adjoining rooms.

In each group, ask participants to:

- a. Draw the designated area, beginning with some central feature: road, river, or boundaries that have been predetermined. Encourage everyone to participate, at least in determining what should be on the map, if not doing the actual drawing. Watch the time; make sure they begin drawing at least by halfway through the allotted time.
- b. Once their drawing is done, ask them to do two or three (maximum) of the following:
  1. Put small pieces of colored paper to identify frequency of where they spend their time: one color for daily, one for weekly, one for monthly or less frequently. They use as many of each as they wish. Tape or paste the pieces of paper down after they have finished.
  2. Use two other colors of paper to identify places they like to be and don't like to be. They use as many as they wish. Tape or paste the pieces of paper down after they have finished.
  3. Use sets of three graduated circles per person to identify most important, second most, and least important institutions or resources. Tape or paste down after they have finished.
  4. Use small sticky pads or small squares of paper to draw or write things they need or want in their community. They use as many as they wish. Tape or paste down after they have finished.
- c. Ask the group to look at its map and the patterns of frequency, likes and dislikes, importance, or whatever it has identified. Why has it identified these places? What does it think it needs? Why?
- d. Select a reporter who will describe his group's map and analysis to the other group.
- e. Bring groups together. Have them post their maps where everyone can see them.
- f. Process by:
  1. One member from each group describes his or her group's map and what the group discovered about the patterns of frequency, likes and dislikes, importance, or whatever they have identified.
  2. Look at similarities and differences in the maps. Why might they be?
  3. Opportunities presented, such as available resources, location of resources or potential resources, etc.
  4. Constraints, such as lack of knowledge, places not usually frequented, resources unused, distance to needed service, etc.
  5. Places liked and disliked; why? Does this raise any needs or problems that need to be addressed?

6. Needs they perceived. Were they the same for men and women? If not, why might that be?
7. As a community, what did we learn from this exercise? How might we use this information? What might be some next steps?

Thank community groups. If they created a community and played roles, ask them to step out of their roles and become participants again.

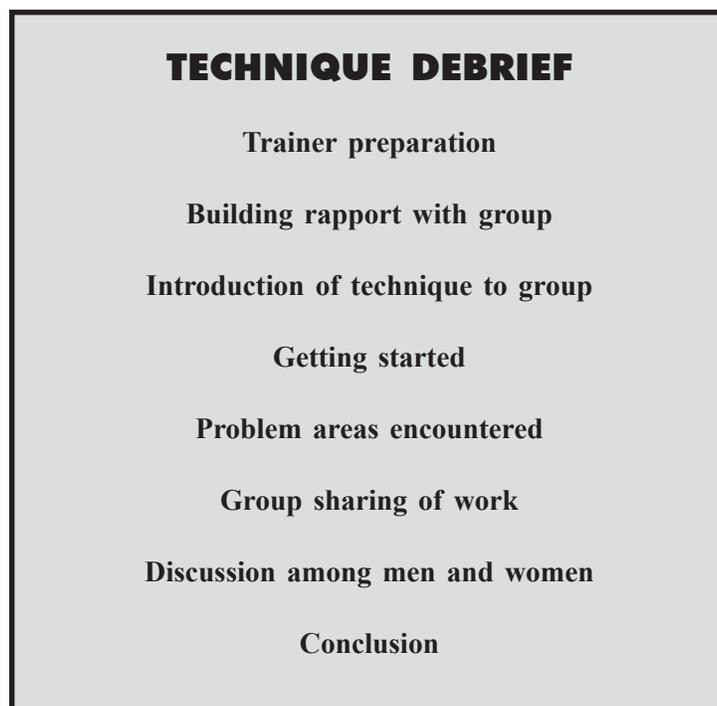
### **III. WALK THROUGH THE STEPS** (10 minutes)

Distribute the handout “Community Mapping.”

Review the steps of conducting a community mapping activity, using the demonstration they just participated in and the points on the handout.

### **IV. TECHNIQUE DEBRIEF** (10 minutes)

Lead a discussion of the technique, as it was demonstrated, using “Technique Debrief” flip chart. Discuss ways they might want to modify what happened to make the technique more comfortable for them to use.



**V. CLASSROOM PRACTICE [OPTIONAL]** (30 minutes)

Have trainees conduct the community mapping technique with a small group of participants, such as site personnel. Use the flip chart points above to discuss their practice.

**VI. APPLICATION** (15 minutes)

Discuss how this technique could be useful, such as working with a community or an agency, assigning a development worker to the community, and leading to a community action plan relevant to the Peace Corps programming process, as appropriate to the training group.

Discuss applications of the tool described in the Field Insights and Adaptations, if desired.

**REFERENCES**

Sims Feldstein, Hilary, and Jiggins, Janice, eds. *Tools for the Field: Methodologies Handbook for Gender Analysis in Agriculture* (Kumarian Press, 1994), Chapter 8.

Thomas-Slayter, Barbara, Esser, Andrea Lee, and Shields, M. Dale. *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management* (ECOGEN, USAID, 1993), pp. 18-19, 24-25.

**NOTES**

# COMMUNITY MAPPING

## OBJECTIVES

1. To identify the gender-differentiated use of and access to community resources as well as to the institutions external to the community.
2. To compare gender-differentiated perceptions of the relative importance of different community resources including outside institutions, such as markets, extension services, health clinics, and so forth.
3. To identify gender-differentiated needs in their community.

## MATERIALS



- Flip chart paper
- Large markers - several colors
- Glue stick
- Scissors
- Tape
- Tacks or pins
- Pads of stick-on notes, smallest size, any color
- Two or three (maximum) of the following:
  1. For relative importance, three sizes of colored circles, one set for each participant
  2. For frequency, 50 small pieces of three different colored papers
  3. For likes and dislikes, 20 additional pieces of two other colors than used for frequency
  4. For needs, two small pads of sticky notes or small squares of paper

## PROCEDURE



1. Group men and women in separate work areas. Each person should contribute to the map.
2. Begin by explaining that they will be drawing a map of their community. Ask them what a good reference point might be, such as a road or river, to give them a starting point.
3. Have them locate some or all of their houses and land, if appropriate.
4. Ask them to add other places or objects such as residence areas, fields/irrigation ditches, schools/churches, points of contacts or institutions such as markets, health centers, recreational areas, police stations and contact persons.
5. Once their drawing is done, ask them to do two or three (maximum) of the following:
  - a. Put small pieces of colored paper to identify frequency of where they spend their time: one color for daily, one for weekly, one for monthly or less frequently. They use as many of each as they wish. Tape or paste the pieces of paper down after they have finished.
  - b. Use two other colors of paper to identify places they like to be and don't like to be. They use as many as they wish. Tape or paste the pieces of paper down after they have finished.

- c. Use sets of three graduated circles per person to identify most important, second most, and least important institutions or resources. Tape or paste down after they have finished.
  - d. Use small sticky pads or small squares of paper to draw or write things they need or want in their community. They use as many as they wish. Tape or paste down after they have finished.
6. Then ask each group to analyze its map, looking at the resources it has, discussing where it likes to be and why, and where it does not like to go and why. They may also point out what they feel is missing from the community which they feel they need. This discussion will help them summarize their information which will be presented by one member to the other groups in the next step.
  7. Bring the groups together and post the maps side by side where everyone can see them.
  8. Assist them to discuss their work using the following:
    - a. One member from each group describes his or her group's map and what the group discovered about the patterns of frequency, likes and dislikes, importance, or whatever has been identified.
    - b. Look at similarities and differences in the maps. Why might they be?
    - c. Opportunities presented, such as available resources, location of resources or potential resources, etc.
    - d. Constraints, such as lack of knowledge, places not usually frequented, resources unused, distance to needed service, etc.
    - e. Places liked and disliked; why? Does this raise any needs or problems that need to be addressed?
    - f. Needs they perceived. Were they the same for men and women? If not, why might that be?
    - g. As a community, what did we learn from this exercise? How might we use this information? What might be some next steps?
  9. Thank the participants.

# PACA TOOLS: ROLES OF FACILITATORS

## I. INTRODUCTION TO THE COMMUNITY

- A. Introduce facilitators and their purpose.
- B. Have community members introduce themselves.
- C. Do an icebreaker, unless it will be done in separate groups.
- D. Describe the tool(s) to be used.
- E. Divide into groups and send them to their work locations.

## II. FACILITATION OF SEPARATE WORK GROUPS (IN EACH GROUP)

- A. Do an icebreaker, unless done above.
- B. Make name tags and put them on, if the group members and facilitators don't know each other.
- C. Facilitate the technique: daily activities, seasonal calendar, community mapping, or needs assessment and priority ranking.
- D. Prepare the group to share its work with the others.

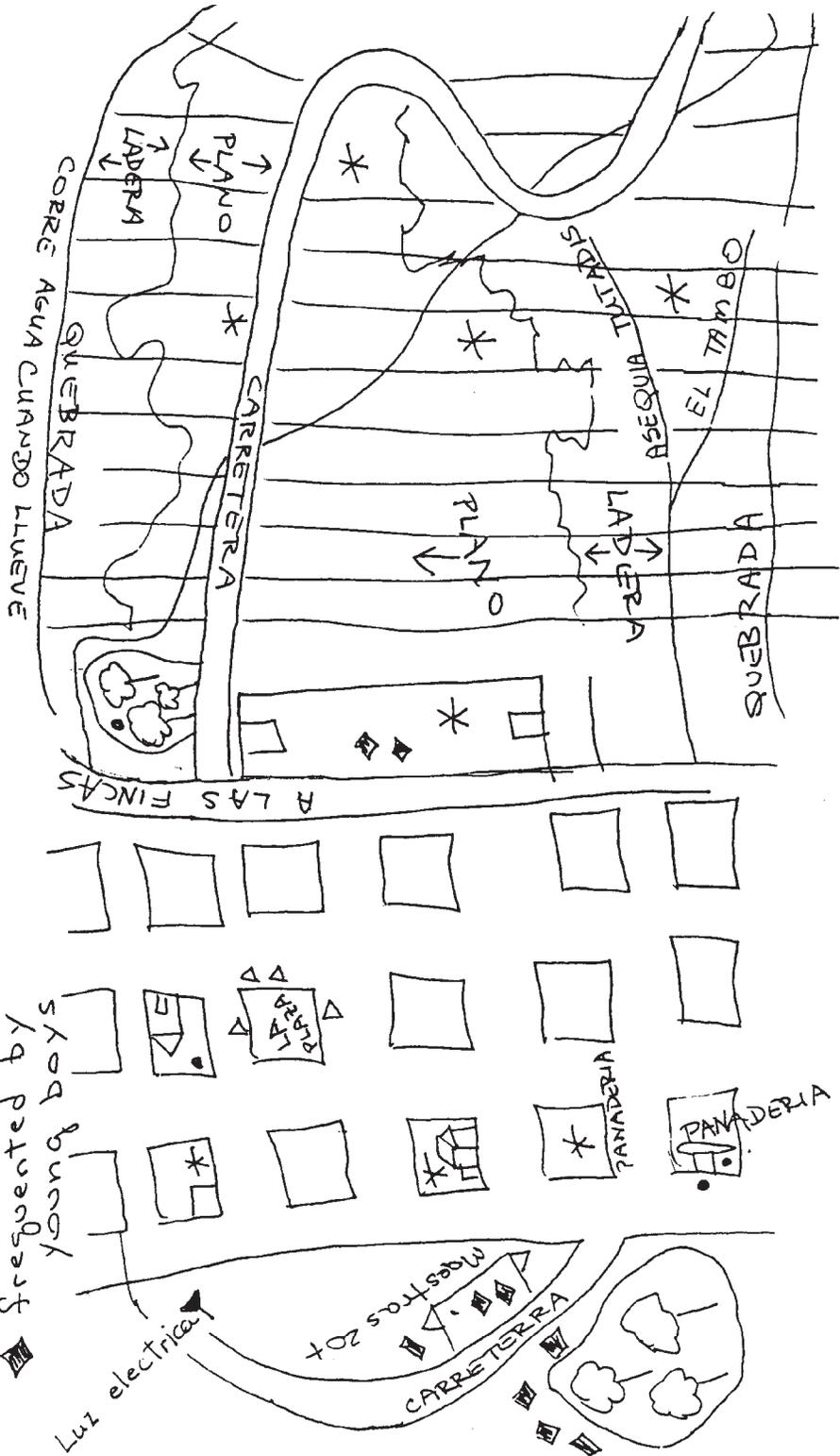
## III. FACILITATION OF LARGE GROUP MEETING

- A. Ask each group to present their work to the others and answer questions.
- B. Encourage a group member to facilitate, or you facilitate, the discussion questions related to the technique.
- C. Summarize the technique and learning, talk about next steps, thank the community.

# COMMUNITY MAPPING - ECUADOR

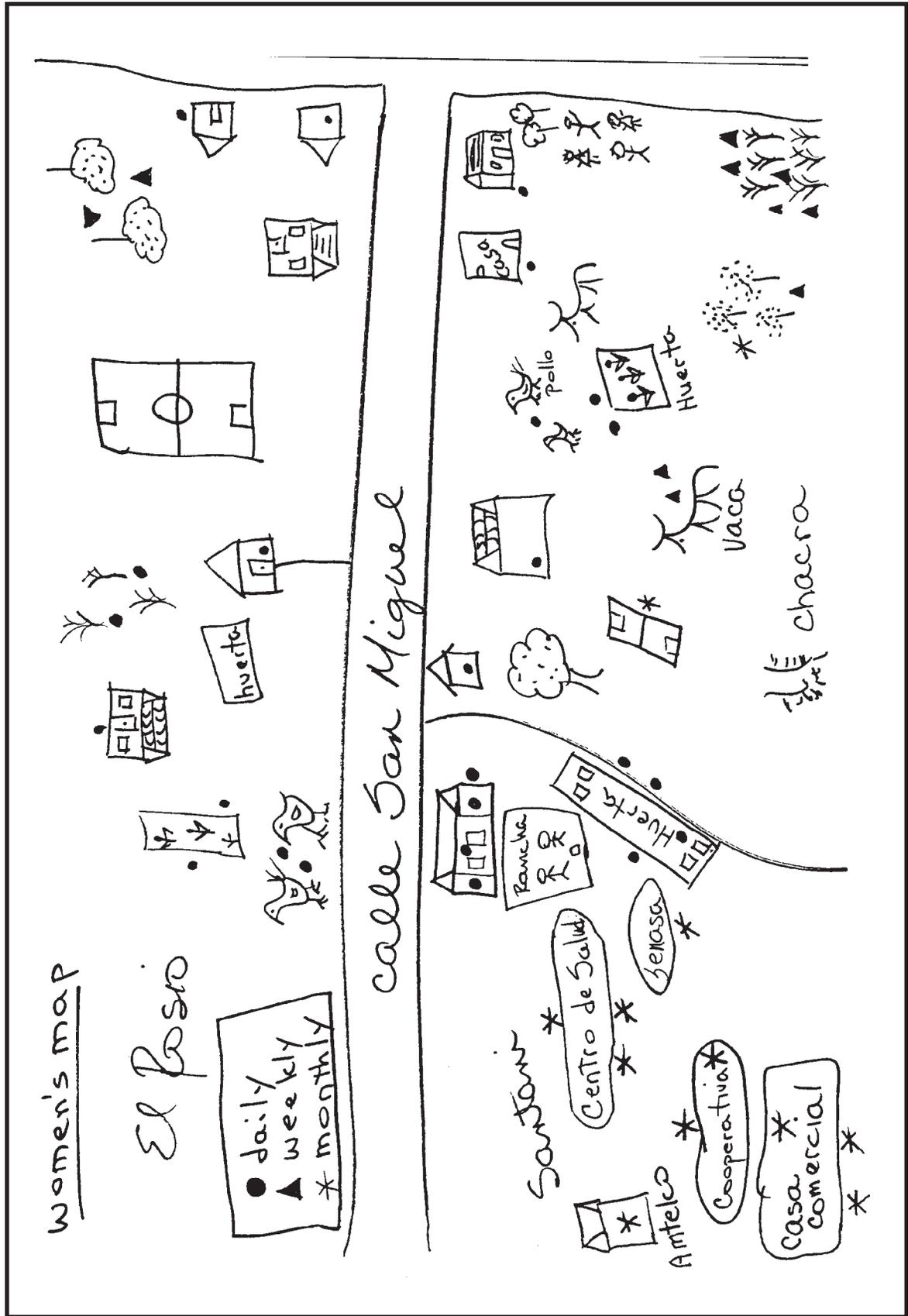
Men's Map

- \* most frequent visits
- △ next frequent
- least frequent
- ▣ frequented by school boys

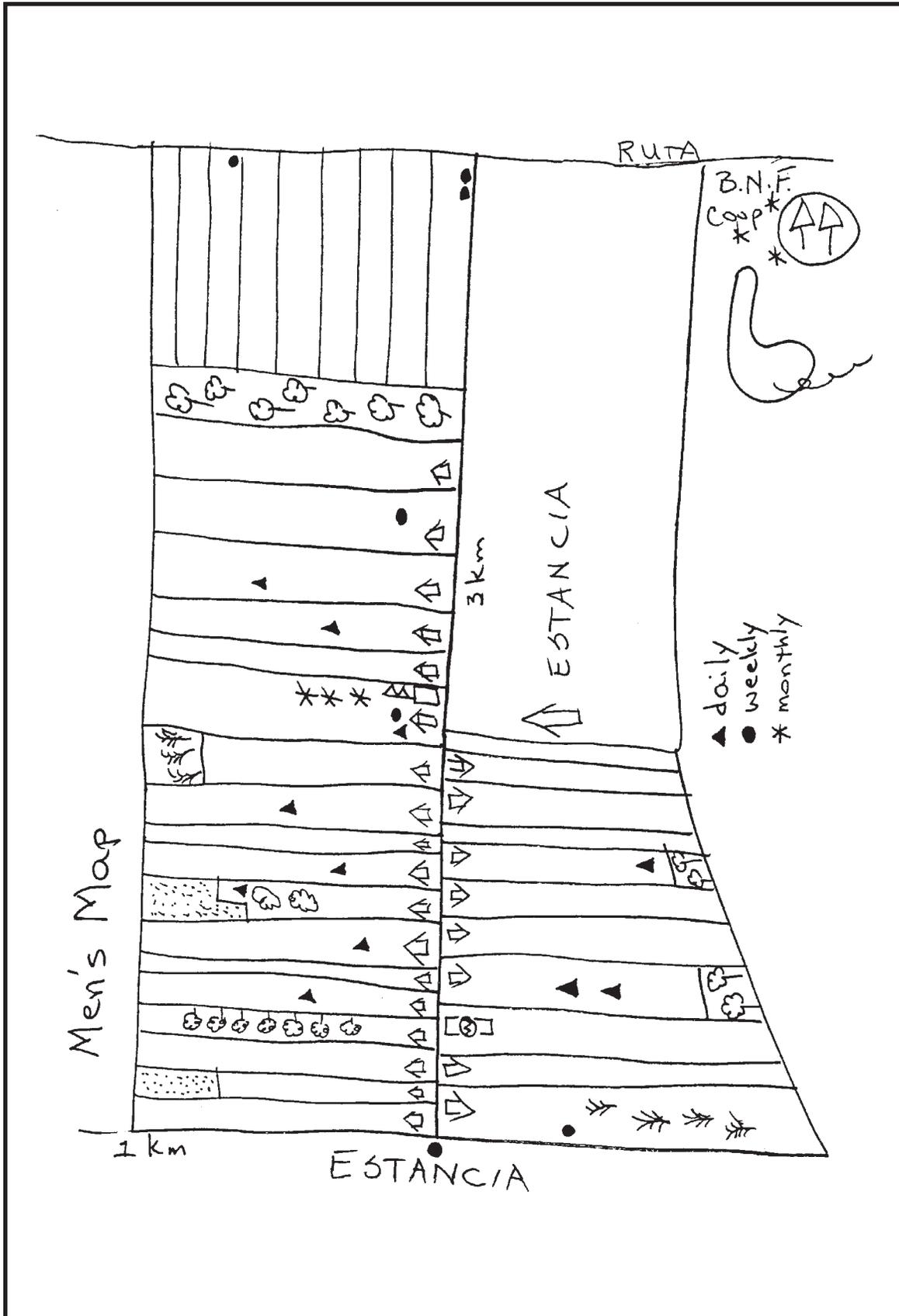




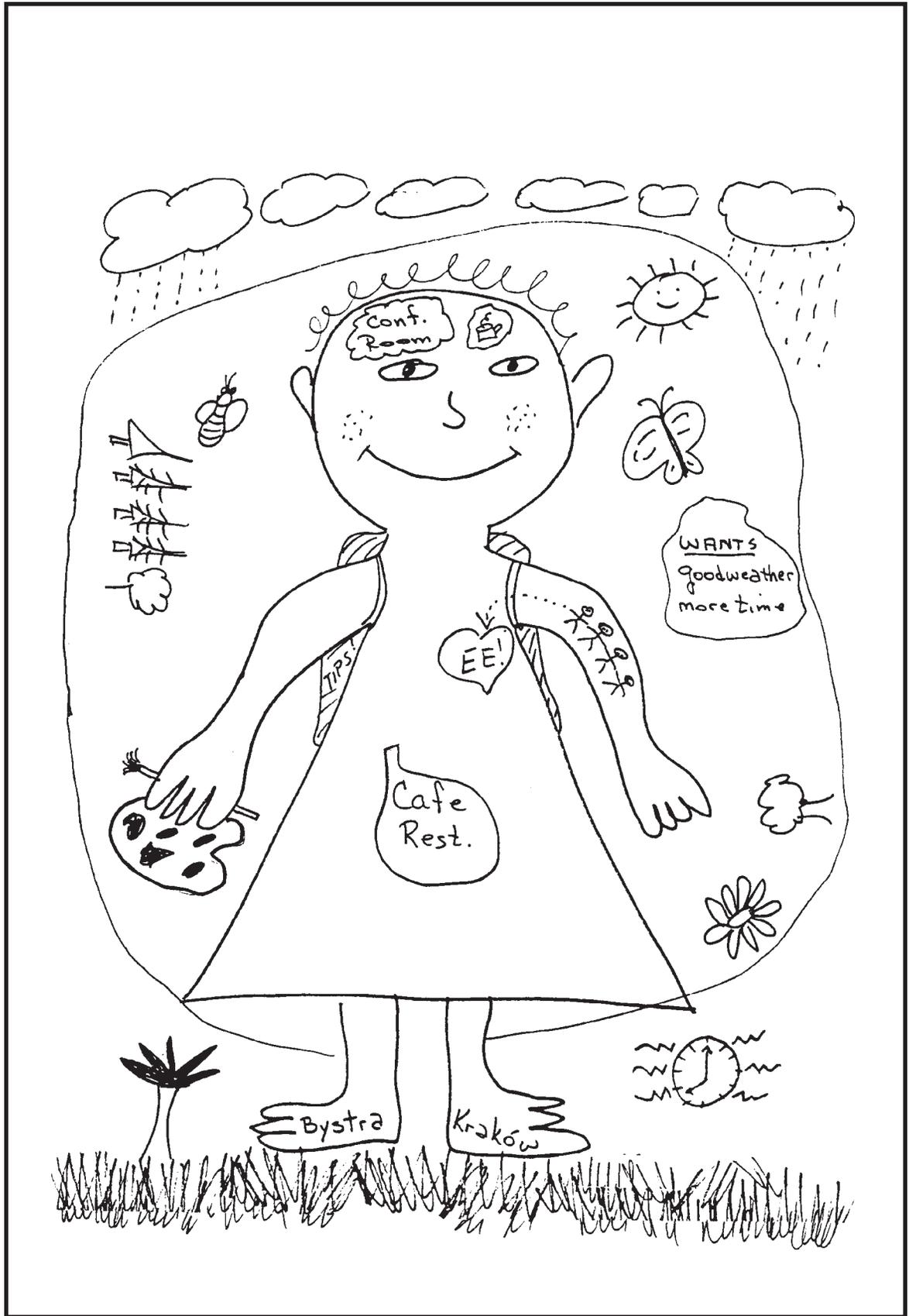
# COMMUNITY MAPPING - PARAGUAY



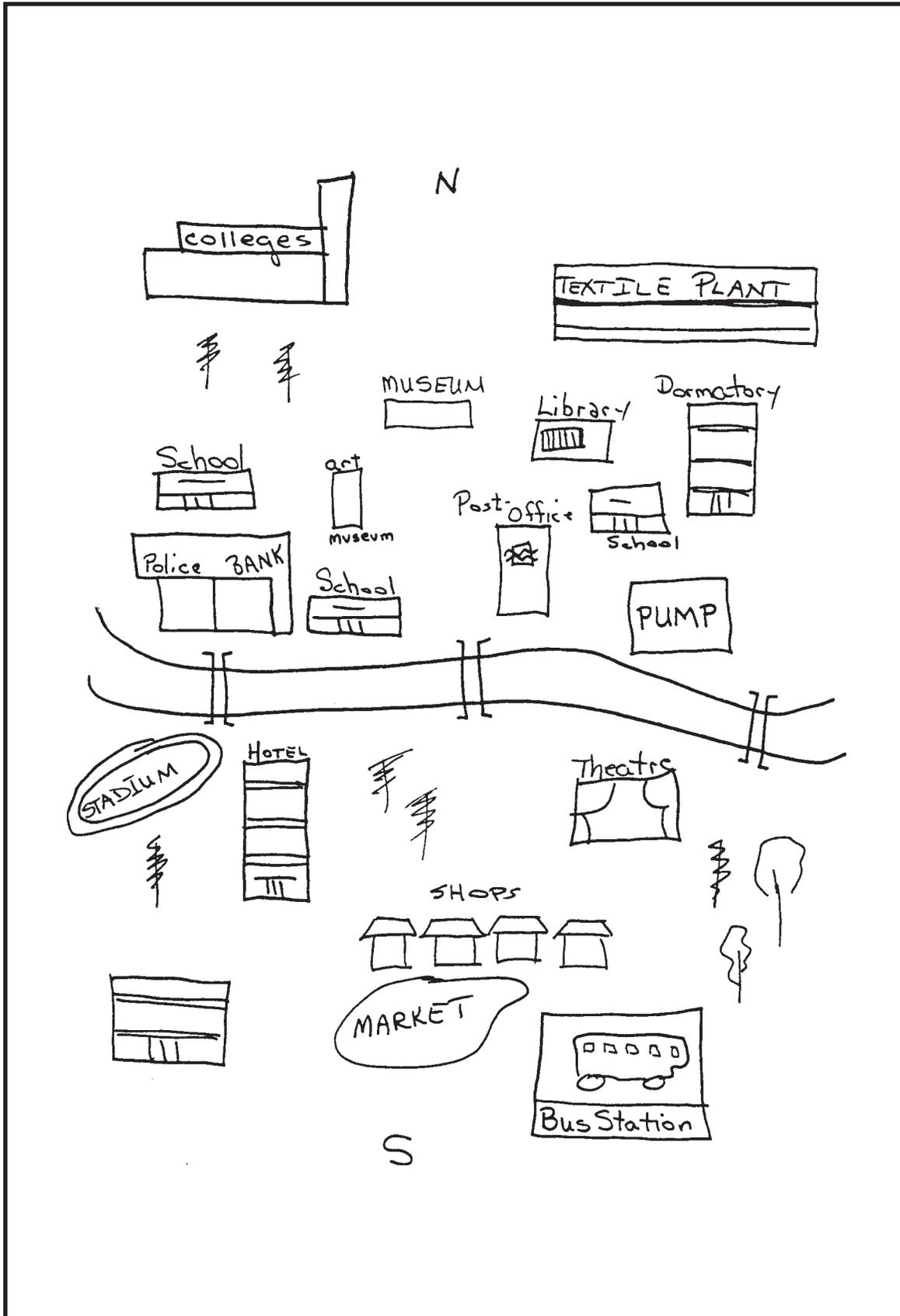
# COMMUNITY MAPPING - PARAGUAY



# COMMUNITY MAPPING - POLAND



# COMMUNITY MAPPING - TURKMENISTAN



# DAILY ACTIVITIES

## RATIONALE

At one level, this technique is meant to identify the routine labor demands of men and women in their daily lives. This information provides valuable insights into both the labor constraints of each group as well as the areas where labor-saving technologies might be readily adapted. At another level, this technique demonstrates the gender-based perceptions of the work load of each group. In this sense, the technique helps to raise awareness with regard to the contribution that different groups make to overall household welfare. Finally, the information developed can serve as baseline data to return to as a way to monitor the impact of project activities on people's time allocations.

## TIME



1 1/2 - 2 1/2 hours  
(depending on whether a demonstration is included)

## GOAL AND OBJECTIVES

### GOAL

To introduce participants to the technique of representative daily activities.

### OBJECTIVES

1. To learn how to develop representative daily activities with community groups.
2. To use representative daily activities as the basis for discussion of differing perceptions of daily workloads.
3. To use the schedules to identify labor constraints and opportunities for labor-saving technologies for men and for women.
4. To relate these results of this technique to the development of a community action plan that incorporates gender realities.
5. To use as baseline information for monitoring project impact on labor allocations.

## SESSION OUTLINE

- I. Introduction (5 minutes)
- II. Demonstration [optional] (30-45 minutes)
- III. Talk through the technique (15-30 minutes)
- IV. Practice the technique (30-45 minutes)

V. Debrief the practice (20 minutes)

VI. Application (10 minutes)

## TRAINER PREPARATION



Read the session plan and references listed at the end of the session plan.

This is a straightforward PACA tool which can be easily understood from a description of the steps. Therefore, a demonstration of the technique is listed as optional. It is easy to arrange for trainees to practice it in the training classroom. A number of possibilities exist for groups to use for practice.

If the session is used in pre-service training, potential practice groups include:

1. language instructors,
2. other training staff,
3. representative host family members, or
4. Peace Corps staff, such as APCDs.

At in-service trainings or staff training, groups for practice include the Volunteers themselves, counterparts, other participants, or training site personnel.

The demonstration and practice groups need to be identified and invited, prior to the session. Consider whether the entire session will be presented at one time, or if the practice and debrief will be scheduled for another time.

Shadowing is a related activity, but focuses on individually accompanying someone through his or her daily routine. This technique may be helpful for understanding roles and responsibilities of men and women as individuals. It can contribute to a larger picture of gender roles if a number of trainees each shadow a different person, and then meet in groups by the gender of the person they shadowed to develop a composite profile.

This is a technique that can be used during pre-service training, with trainees shadowing one of their host family members, then meeting together with other trainees to develop profiles. Comparison of the representative daily schedules of men and women is a good introduction to culturally determined gender roles and responsibilities, and a good lead into the session “Introduction to a Systems Approach.”

## MATERIALS



- Blank flip chart paper
- Large marking pens
- Tape
- Tacks or pins

## HANDOUTS

- Daily Activities
- PACA Tools: Roles of the Facilitators
- Any sample daily activities you wish to distribute

## FLIP CHART

- Technique Debrief

### PROCEDURE



#### I. INTRODUCTION (5 minutes)

Explain:

Daily activities is a technique used to identify the routine labor demands of men and women in their daily lives. This information provides valuable insights into both the labor constraints of each group as well as the areas where labor-saving technologies might be readily adapted. At another level, this technique demonstrates the gender-based perceptions of the work load of each group. In this sense, the technique helps to raise awareness with regard to the contribution that different groups make to overall household welfare. It can also be used as baseline data to return to as a way to monitor the impact of project activities on people's labor allocations.

This technique requires two groups—one representing the men in the community and another, the women—located in separate areas with their respective sets of session materials. These groups must be chosen carefully and with attention to representativeness of the group selected. If only the men of a dairy cooperative or the women with migrated husbands are selected, the routine activity schedule may not be representative of the community, though they will represent their particular segment of the population. Once the groups are formed, the facilitators explain that the purpose of this exercise is to trace a routine day from the time of rising to the time of retiring at the end of the day.

#### II. DEMONSTRATE THE DAILY ACTIVITIES TECHNIQUE [OPTIONAL]

(30-45 minutes)

Conduct a demonstration, using the steps described in Section III.

#### III. TALK THROUGH THE TECHNIQUE (15-30 minutes)

Distribute the handout "Daily Activities."

Talk through the steps, using the additional notes provided here and any experiences gained through the demonstration, if done.

1. Divide the participants into groups of women and men and move them to separate work spaces.
2. Ask the group to consider a routine day during the year. (If there are great differences by season or work period [for example, teachers, agricultural workers], they may need to repeat the exercise twice, once for each period.) Then, beginning with the time that the day begins, the group is asked to reconstruct a normal day. The level of specificity should be determined by the nature of the activity: bathe or wash and eat breakfast, go to the fields, bring in the cows, prepare dinner, etc.

3. These activities should be associated with rough estimates of the time block. Multiple tasks during one time period are not uncommon, especially for women, e.g., cooking, child care, and helping a child with school work.
4. After each group has developed its routine day, they are asked to reconstruct the typical day of the opposite sex, going through the same process as above. This may be difficult for some groups, but the discussion of what they think the opposite gender does is useful.
5. The typical “man-days” and “woman-days” are recorded on flip charts. Each group should select someone to explain its schedules to the other group.
6. The two groups are then rejoined, and the schedules are posted. Each group reports out its results. Then the assembled community is asked to interpret the differences in labor demand and in perceptions of work loads, using questions such as:
  - a. What are the differences in labor demands? Their perceptions of work loads?
  - b. What would reduce some of the work load? (Closer source of water, machinery, child care, etc.)
  - c. When would be the best times of days for meetings? Training?
  - d. Other?

Ask the participants:

What experiences have you had with this technique? If none, what kinds of differences do you anticipate there will be between men’s and women’s schedules?

Distribute and examine some of the samples, if desired.

#### **IV. PRACTICE THE TECHNIQUE** (30-45 minutes)

Tell the trainees that they will have an opportunity to actually practice this technique. Describe who will be in their practice group.

Distribute handout “PACA Tool: Roles for Facilitators.” Talk through the different roles that need to be played in presenting the technique. Have trainees determine who will take which responsibilities. Encourage them to divide up the tasks so that as many of them as possible have some role during the practice.

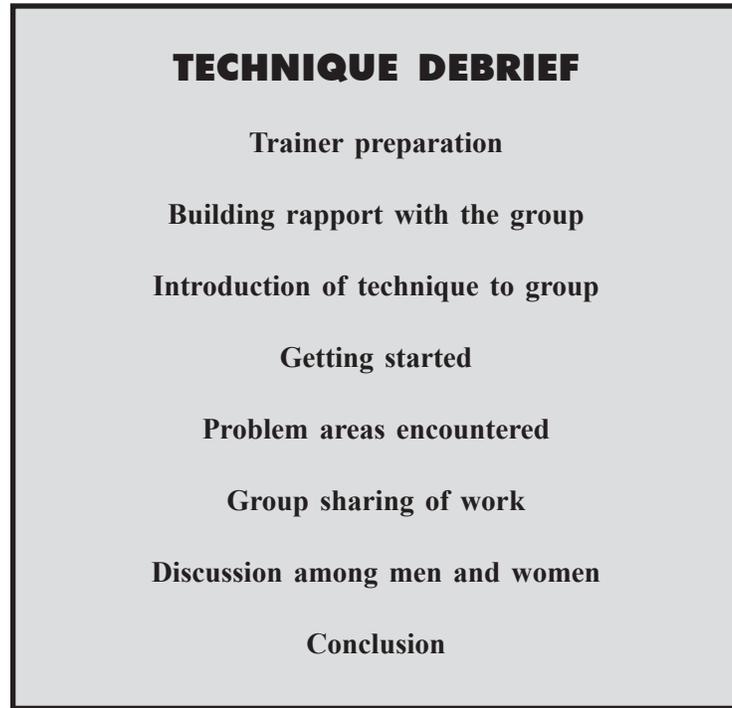
Give trainees preparation time, or break the session and reconvene at a designated time and place when the practice group is assembled.

The trainees address the group as they might a community group, explaining what they are going to do, establishing the subgroups, and conducting the exercise as described above.

At the end of the practice session, trainees and staff should thank the participants and dismiss them. If the trainees, themselves, have played the role of group members, ask the participants to change their seats and get out of their roles.

**V. DEBRIEF THE PRACTICE** (20 minutes)

Lead a discussion of the technique, using the points on the “Technique Debrief” flip chart. Encourage participants to think through what was difficult, what they might want to do differently when working in a community.

**VI. APPLICATION** (10 minutes)

Discuss how this technique could be useful in working with a community or an agency, assigning a development worker to a community and leading to a community action plan, or its relevancy to the Peace Corps programming process, depending upon the trainees.

**REFERENCES**

Sims Feldstein, Hilary, and Jiggins, Janice, eds. *Tools for the Field: Methodologies Handbook for Gender Analysis in Agriculture* (Kumarian Press, 1994), Chapter 8.

Thomas-Slayter, Barbara, Esser, Andrea Lee, and Shields, M. Dale. *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management* (ECOGEN, USAID, 1993), pp. 18-19, 24-25.

**NOTES**

# DAILY ACTIVITIES

## OBJECTIVE

To identify routine labor demands of men and women in their daily lives.

## MATERIALS



- Flip chart paper
- Tape
- Large markers

## PROCEDURE



1. Group men and women in separate work spaces.
2. Ask them to consider a routine day during the year. (If there are great differences by season or work period [example: teachers, agricultural workers], they may need to repeat the exercise twice, once for each period. Children, for example, do one schedule for school days and another for a weekend day.) Activities do not necessarily need to be elaborated: get up, bathe, eat breakfast, walk to work, etc.
3. The activities should be associated with rough time estimates, or blocks of time. Multiple tasks done during the same time period are not uncommon, especially for women. For example, they may be cooking a meal while feeding, washing, or minding the children, or doing handiwork while visiting with friends.
4. After each group has developed its own typical day, it is are asked to reconstruct a typical day of the opposite sex, going through the same process above.
5. The typical days are recorded on flip charts. Each group should select someone to report its daily schedule to the other group.
6. Both groups are brought together and their schedules are posted where they can be seen by everyone. They are discussed:
  - a. Someone from each group describes his or her own day, and his or her perception of the others' day. Answer questions from the other group.
  - b. What are the differences in labor demands? Their perceptions of work loads?
  - c. What would reduce some of the work load? (Closer source of water, machinery, child care, etc.?)
  - d. When would be the best times of days for meetings? Training?
  - e. Other?
7. Close the discussion by asking: What did you learn? Is there anything you might do differently now?
8. Thank the group for its participation. Explain any follow-up or next steps, as appropriate.

# PACA TOOLS: ROLES OF FACILITATORS

## I. INTRODUCTION TO THE COMMUNITY

- A. Introduce facilitators and their purpose.
- B. Have community members introduce themselves.
- C. Do an icebreaker, unless it will be done in separate groups.
- D. Describe the tool(s) to be used.
- E. Divide into groups and send them to their work locations.

## II. FACILITATION OF SEPARATE WORK GROUPS (IN EACH GROUP)

- A. Do an icebreaker, unless done above.
- B. Make name tags and put them on, if the group members and facilitators don't know each other.
- C. Facilitate the technique: daily activities, seasonal calendar, community mapping, or needs assessment, and priority ranking.
- D. Prepare the group to share its work with the others.

## III. FACILITATION OF LARGE GROUP MEETING

- A. Ask each group to present its work to the others and answer questions.
- B. Encourage a group member to facilitate, or you facilitate, the discussion questions related to the technique.
- C. Summarize the technique and learning, talk about next steps, thank the community.

# SEASONAL CALENDARS

## RATIONALE

This technique traces seasonal variations in household labor supply and demand, income flow, and expenditure patterns. It has been demonstrated that household well-being fluctuates seasonally during the year in terms of food and income availability and the demand on household resources. Many households experience a “hungry season” or periods of economic stress, and these variations may have differential impacts on different gender groups. Some times of the year are busier for one group or the other. This technique is designed to identify these seasonal variations in household well-being from the perspective of both men and women. An understanding of these seasonal variations is important to the development and implementation of a community action plan.

## TIME



2 hours

## GOAL AND OBJECTIVES

### GOAL

Introduce the PACA technique of eliciting gender-differentiated seasonal calendars.

### OBJECTIVES

1. To demonstrate the utility of this technique in identifying gender-based patterns of control over income and expenditures, seasonal labor bottlenecks, and overall shifts in household welfare.
2. To practice the technique.
3. To discuss its application to the Peace Corps Volunteers’ assignments and the programming process.

## SESSION OUTLINE

- I. Introduction (5 minutes)
- II. Demonstration of calendar technique (20 minutes)
- III. Walk through the steps (20 minutes)
- IV. Practicing the technique (45 minutes)
  - V. Debrief the practice (20 minutes)
- VI. Application (10 minutes)

## TRAINER PREPARATION

This session involves the visual comparison of several different spheres of household activity and experience. The challenge of this technique is to elicit and graphically organize disparate forms of information on a single plane so that the participants clearly perceive the seasonal relationships between labor supply and use, the flow of income, the variations in expenditures, and overall household welfare. There is a danger here for visual cluttering, which weakens the effectiveness of the presentation. A further challenge to trainer skills is to maintain participant attention on the linear logic of the focus group interview, which is to begin with labor at the start of a significant activity cycle (e.g., the rainy season for farmers or the school year for teachers), then to follow this activity sphere throughout the entire year in a linear fashion. If the trainer jumps vertically between activity spheres (for example, if the question becomes: “What happens in January?”), confusion will soon set in.

The linear nature of this visualization may be more logical to the trainer than the participants. Being able to carry a particular activity through its cycle is necessary for this visualization (and later interpretation), even though many people don’t think of different aspects of their lives in this way. It may be necessary to talk through the activities first, and construct the visual representation later.

It saves time and, thus, does not break the flow of the discussion, if the sheets of paper are lined in pencil in advance with 12 monthly segments. Once the beginning month is determined by the group, the trainer can quickly fill in the months and be ready to continue. It is possible, however, that the people may see their lives in longer cycles, 18 months for example, rather than 12. Be prepared to add months, if necessary.

This technique is more complicated than it sounds. It is helpful for trainees to see a demonstration. The trainer selects a couple of people to interview to develop a calendar as a demonstration. The people being interviewed do not need preparation, just a brief example of what they’ll be doing and agreement to share information about the seasonal activities of a place they currently live, or lived in the past. Other training staff members can be used for the demonstration. Former Volunteers can relate information about their posts. They do not need to remember all details. (If only one person is used as the source of information, make it clear to the trainees that this is out of necessity; the development of a seasonal calendar should be a group activity.)

Several options are possible to practice developing calendars within the classroom setting.

1. Members of the training group can use their own lives and communities as models. This is especially effective if there are two or more people from the same community within the training group. One can be an informant for each of the groups, men and women.
2. Subgroups based on Volunteer assignment or staff position can develop calendars relevant to their work and typical communities. For example, educators, health workers, youth development workers, might each develop a calendar.
3. You may use a case study or scenario, or the trainees may create their own situation. This will take more preparation time than the other options, however, as they need to do the creative work before they can try and put it on a calendar.

Read this session plan, study the examples, and read any references available in the Information Resource Center to fill in any knowledge gaps in this technique. The sample calendars showing both men’s and women’s tasks on the same calendar are usually reconstructed later from the two separate calendars.

## MATERIALS



- Flip chart paper
- Large marking pens – several colors
- Small marking pens – several colors
- Scissors
- Glue stick
- Tape
- Tacks or pins
- 40 small rectangles of paper (2" x 3")

## HANDOUTS

- Seasonal Calendar
- PACA Tools: Roles of Facilitators
- Examples of seasonal calendars from various countries:
  - Seasonal Calendar – Mbusyani
  - Seasonal Calendar – Philippines
  - Seasonal Calendar – Turkmenistan
  - Your Vegetable Garden – Malawi
  - Seasonal Calendar – Eritrea

## FLIP CHART

- Technique Debrief

## PROCEDURE



### I. INTRODUCTION (5 minutes)

Explain the rationale of this technique:

This technique traces seasonal variations in household labor supply and demand, income flow, and expenditure patterns. It has been demonstrated that household well-being fluctuates seasonally during the year in terms of food and income availability and the demand on household resources. Many households experience a “hungry season” or periods of economic stress, and these variations may have differential impacts on different gender groups. Some times of the year are busier for one group or the other. This technique is designed to identify these seasonal variations in household well-being from the perspective of both men and women. An understanding of these seasonal variations is important to the development and implementation of a community action plan.

### II. DEMONSTRATION OF CALENDAR TECHNIQUE (20 minutes)

Introduce the guests to the group. Explain that you are going to be asking a number of questions to elicit a seasonal calendar of a place they have lived.

Ask the guests to explain where they live(d) and briefly describe the location (weather, common foods, occupations of people).

Then, following the steps in Section III of this session plan, develop a seasonal calendar on flip chart paper, using information they supply to you.

Stop after about 20 minutes, whether or not you have finished. Ask your demonstration partners what they learned by doing this: Did any new relationships or ideas emerge as you saw the information formatted this way?

Thank them for their help.

### III. WALK THROUGH THE STEPS (20 minutes)

Distribute the handout “Seasonal Calendar,” which describes the steps of the techniques for the participants.

Use the handout, the additional notes below, as well as what happened in your demonstration to clarify the steps of creating a calendar with community groups.

#### 1. Group men and women into separate groups.

The seasonal calendar technique emphasizes that during the course of any year, households face different levels of difficulty and demand on their resources. Furthermore, these demands may be felt differentially by different members of the household. Thus, the session begins by forming two groups—men and women—who meet in separate areas.

#### 2. Ask them to identify some of their daily and seasonal tasks which are aimed at earning money and maintaining the home and family. (Include productive, reproductive, and integrative [social] work, paid or unpaid.)

#### 3. Ask the group when it considers that the year begins. It does not necessarily have to be January. Based on the decision, label the months of the year across the top of the page.

Asking participants what are some spheres of activity that are common to all households, such as agricultural production or the school year, may elicit the cultural (rather than the calendric) beginning of the year, such as the rainy season. This can become the reference time period for defining the entire year. Or, based on the activities mentioned, the trainer may ask, “When do you consider the year starting?” Use the participants’ notion of the beginning of the year to start the calendar.

#### 4. Have them draw or write each task on small pieces of paper or write them directly on a large piece of paper.

#### 5. Discuss various aspects of each task and draw a horizontal line across the appropriate month when different phases take place.

Two different methods for entering the activities on the calendar have been used successfully:

- a. The trainer (or one of the participants) enters, in a linear fashion, all the tasks and activities associated with a sphere of activity (e.g., land preparation, planting, weeding, harvesting, etc.), as the community members describe them.

The trainer elicits another sphere of activity (such as domestic work) and begins a second linear entry of the relevant tasks throughout the year. This process continues until all the labor demands on the household have been recorded. Seasonal variations in labor demand (or supply) can then be interpreted vertically on the graph.

- b. The community members take the small squares of paper and draw pictorial symbols of the activities, using colored marking pens. Then one activity is taped where it belongs and all the related tasks and activities (in pictures or words) are entered on a line that extends across the calendar months during which there is activity. Then a second sphere of activity is started, and carried to its conclusion, etc.
6. Identify which member of the household does each task.
- This is optional. You may just have different tasks identified, assuming that each group is identifying the tasks that it does. In the discussion when both groups are together, they may further define who does what.
7. After labor, identify, by time of year and sources, when income flows into the household.
- Income sources, eliciting not the quantities but the times of the year when income tends to flow into community households, is what is important. There can be, of course, great fluctuation among individual households; however, this technique seeks more general patterns of income availability that would apply to most, if not all, households in the community (for example, when teachers are paid, crops or handicrafts are sold, or the men go to the coast to work on plantations).
8. Indicate variations in household expenses, identifying times during the year of special expenses, such as school, holidays, religious festivals.
- High expenditure periods should be noted on the calendar.
9. Indicate patterns of household health and welfare. For example, are there certain times of the year when there are illnesses? Are there hungry times?
10. Indicate cultural patterns, e.g., holidays, religious festivals.
11. Each group should analyze its own calendar: looking vertically at patterns of labor and expenses, etc. (This discussion also helps them summarize the information on their calendar, which will be presented by one of them in the next step.)
- The vertical interpretation of the calendar reveals major periods of difficulty, periods of relative ease, labor bottlenecks, etc., which permit a more systemic appreciation of the constraints and opportunities which households face.
12. The groups come together, posting their calendars where everyone can see them.
- a. One person from each group explains his or her calendar.
- b. The groups interpret the information on the calendars with regard to:
- Opportunities, such as free time for other activities, such as repairs, new projects.
  - Constraints, such as periods of high expenditure, intense labor, illness, or cultural practices.
  - Other specific purposes determined by the facilitator or needs and desires of the community. For example, are there better times than others for women to be involved in training programs? Are there ways to mitigate or eliminate illness periods by nutrition or health measures earlier in the year?

Ask:

Have any of you used this technique? If so, what were your experiences?

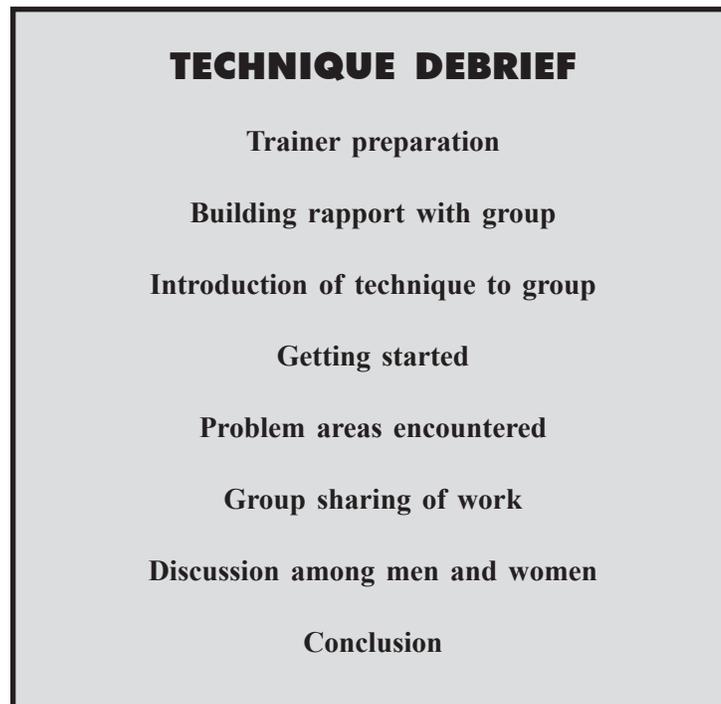
Distribute and discuss any sample calendars.

#### **IV. PRACTICING THE TECHNIQUE** (45 minutes)

The trainer describes how they will do the practice. Some of the trainees become the facilitators and take over the session, beginning with describing what they will be doing, dividing the trainees into groups, and eliciting the calendars. They follow through the steps of the technique, including bringing the groups back together and discussing the two calendars, and finally bring the session to a close.

#### **V. DEBRIEF THE PRACTICE** (20 minutes)

Lead a discussion of the technique using the “Technique Debrief” flip chart.



#### **V. APPLICATION** (10 minutes)

The facilitator leads a discussion of the relevance of this technique for the work they are doing or might do, for Peace Corps programming and project identification, assigning a Volunteer to a community, and monitoring and evaluation, according to the needs of the participants.

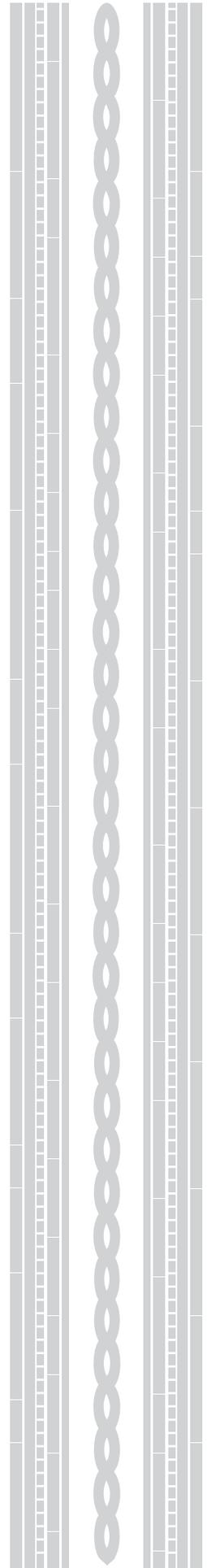
## REFERENCES



Sims Feldstein, Hilary, and Jiggins, Janice, eds. *Tools for the Field: Methodologies Handbook for Gender Analysis in Agriculture* (Kumarian Press, 1994), pp. 49-50, Chapters 11, 12, 13.

Thomas-Slayter, Barbara, Esser, Andrea Lee, and Shields, M. Dale. *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management* (ECOGEN, USAID, 1993), pp. 22-23.

## NOTES



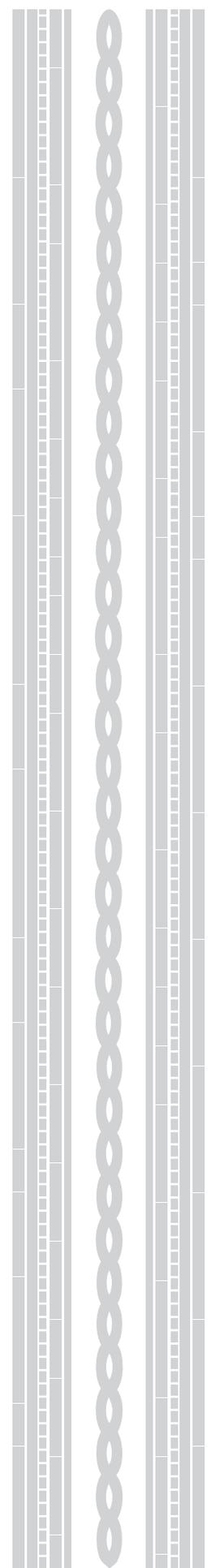


6. Identify which member of the household does which task (see example on preceding page).
7. After labor, identify, by times of year and sources, when income flows into the household.
8. Indicate variations in household expenses, identifying times during the year of special expenses (school, holidays, religious festivals).
9. Indicate patterns of household health and welfare. For example, are there certain times of the year when there are illnesses? Are there hungry times?
10. Indicate cultural patterns, e.g., holidays, religious festivals.
11. Each group should analyze its own calendar: looking vertically at patterns of labor and expenses, etc. (This discussion also helps them summarize the information on their calendar, which will be presented by one of them in the next step.)
12. The groups come together, posting their calendars where everyone can see them.
  - a. One person from each group explains his or her calendar.
  - b. The groups interpret the information on the calendars with regards to:
    - Opportunities such as free time for other activities, available income for developing activities.
    - Constraints such as period of high expenditures, periods of illness, intensity of activities, cultural practices.
    - Other specific purposes determined by the facilitator or needs or desires of the community. For example, when during the year might men or women be available for training? When or how might specific foods be introduced to reduce the intensity of predictable illness periods?

**CODING**

Depending upon how the calendar is developed, coding for gender and age, intensity of work, etc., may be introduced. Alternatively, colors or separate colored pieces of paper might be used. Examples:

- |                |                 |                       |
|----------------|-----------------|-----------------------|
| □ Adult Male   | —————           | Continuous Activity   |
| ■ Male Child   | ● ● ● ● ● ● ● ● | Sporadic Activity     |
| ○ Adult Female | —————           | More Intense Activity |
| ● Female Child |                 |                       |



# PACA TOOLS: ROLES OF FACILITATORS

## I. INTRODUCTION TO THE COMMUNITY

- A. Introduce facilitators and their purpose.
- B. Have community members introduce themselves.
- C. Do an icebreaker, unless it will be done in separate groups.
- D. Describe the tool(s) to be used.
- E. Divide into groups and send them to their work locations.

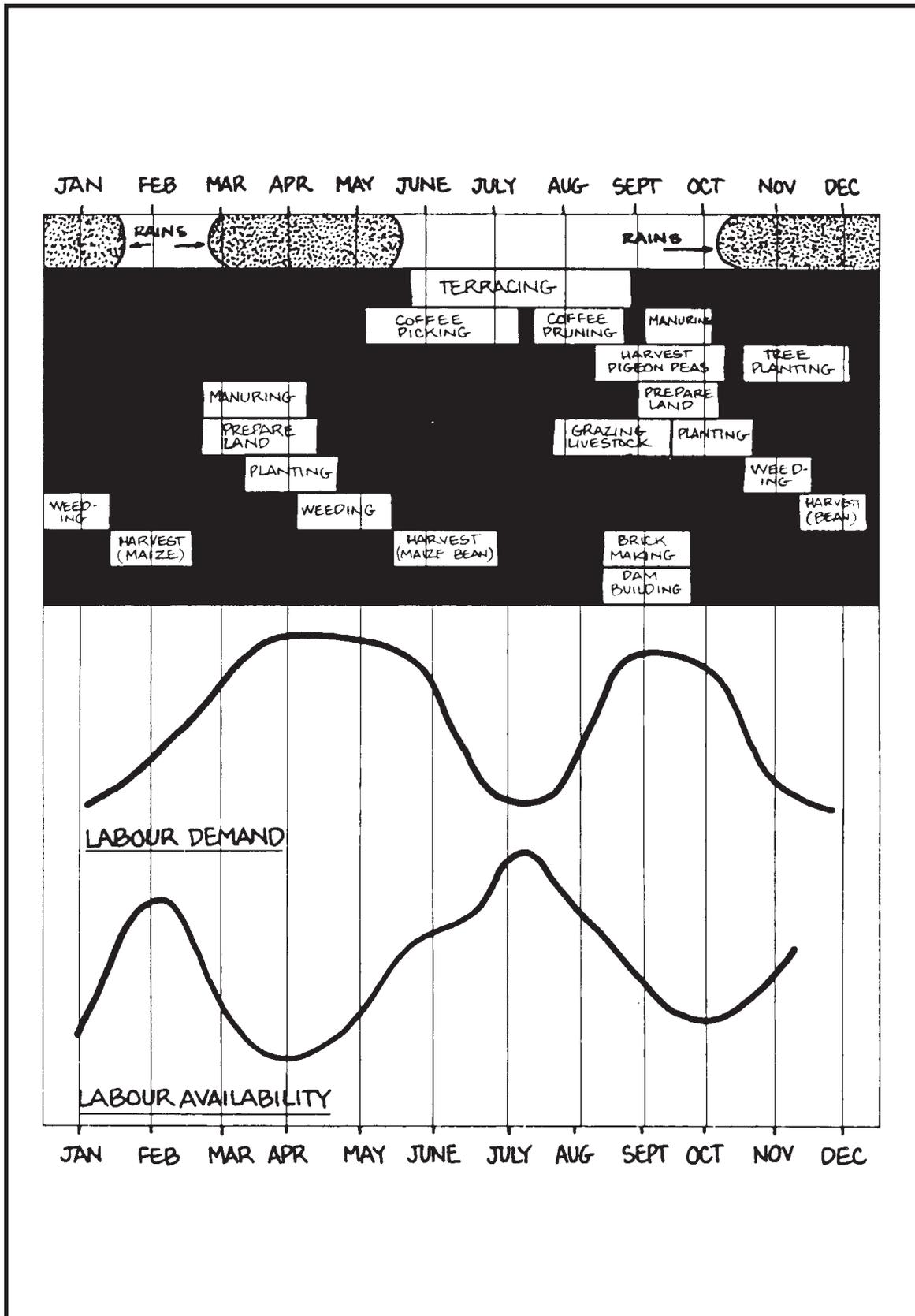
## II. FACILITATION OF SEPARATE WORK GROUPS (IN EACH GROUP)

- A. Do an icebreaker, unless done above.
- B. Make name tags and put them on, if the facilitator and group members don't know each other.
- C. Facilitate the technique: daily activities, seasonal calendar, community mapping, or needs assessment, and priority ranking.
- D. Prepare the group to share its work with the others.

## III. FACILITATION OF LARGE GROUP MEETING

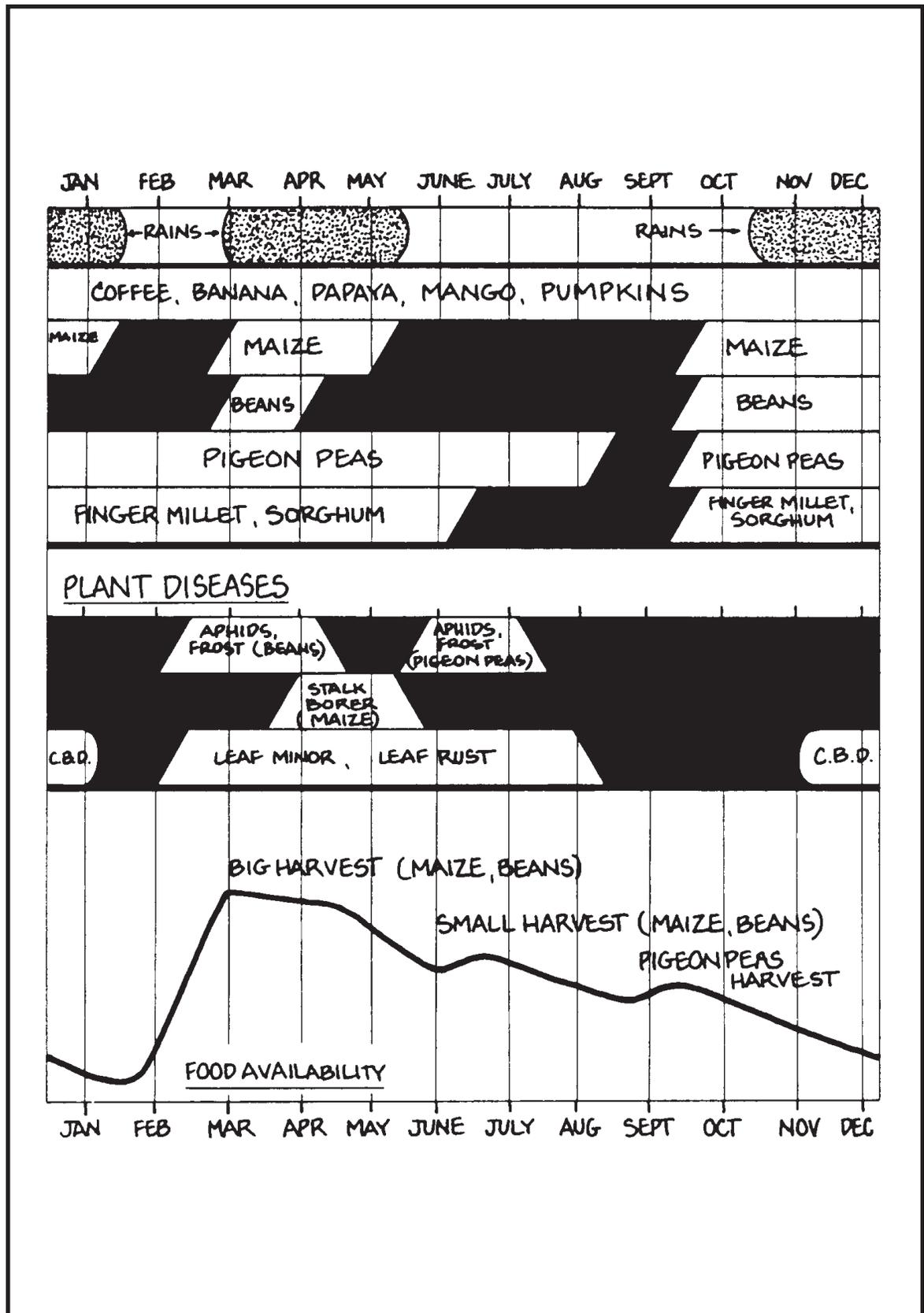
- A. Ask each group to present its work to the others and answer questions.
- B. Encourage a group member to facilitate, or you facilitate, the discussion questions related to the technique.
- C. Summarize the technique and learnings, talk about next steps, thank the community.

# SEASONAL CALENDAR – MBUSYANI



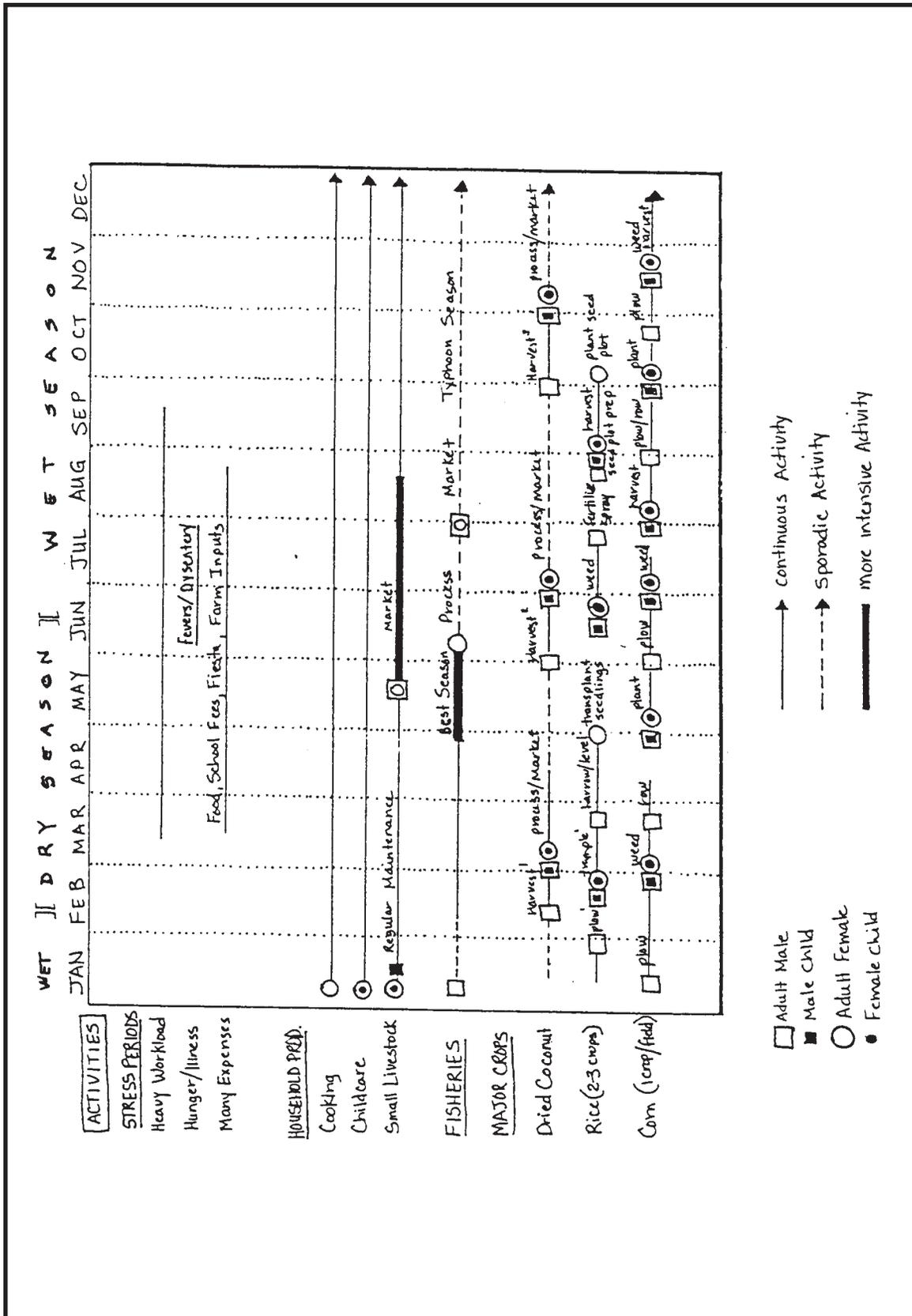
Source: *Participatory Rural Appraisal Handbook*, page 38

# SEASONAL CALENDAR - MBUSYANI



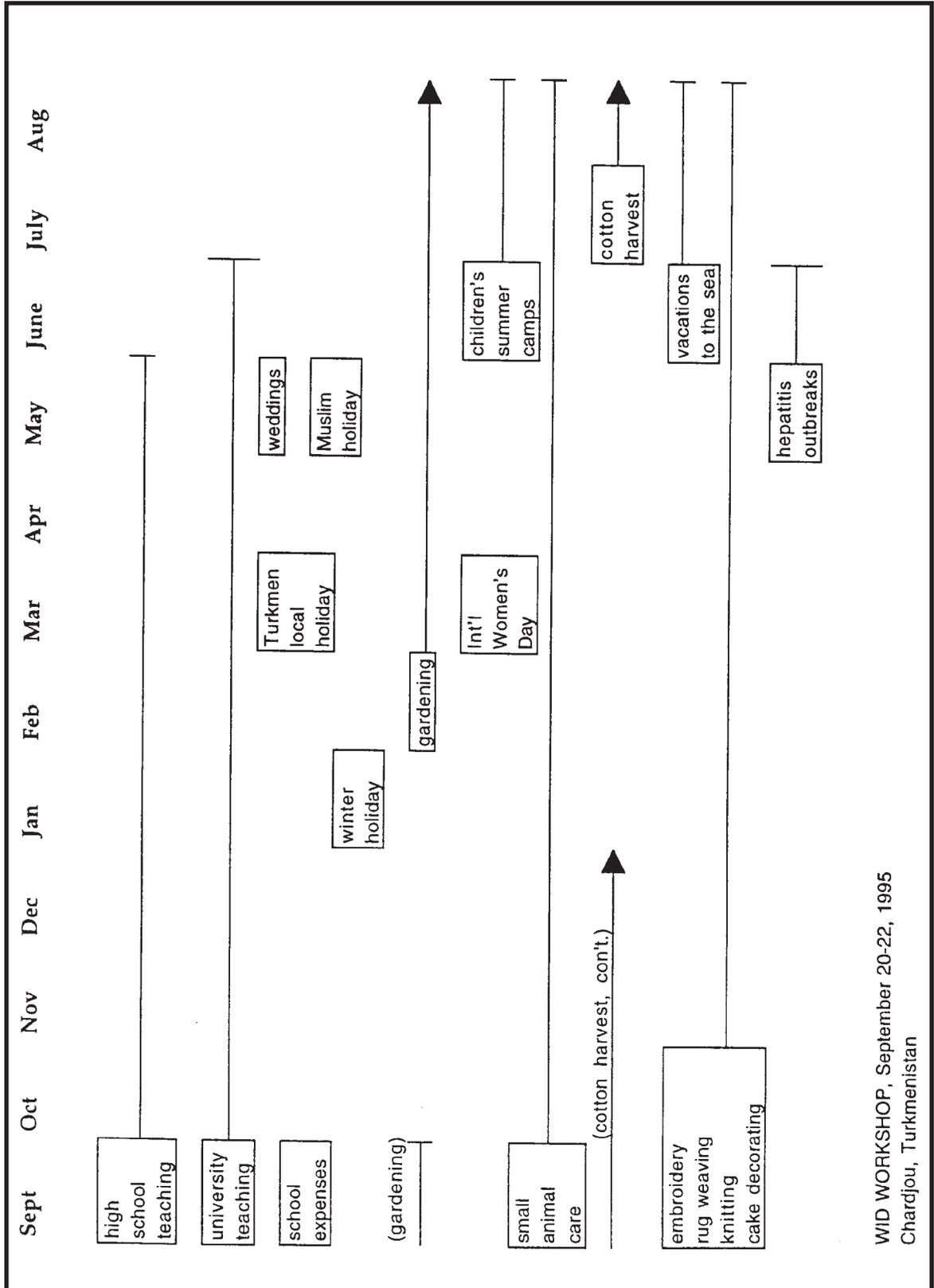
Source: Participatory Rural Appraisal Handbook, page 39

# SEASONAL CALENDAR - PHILIPPINES



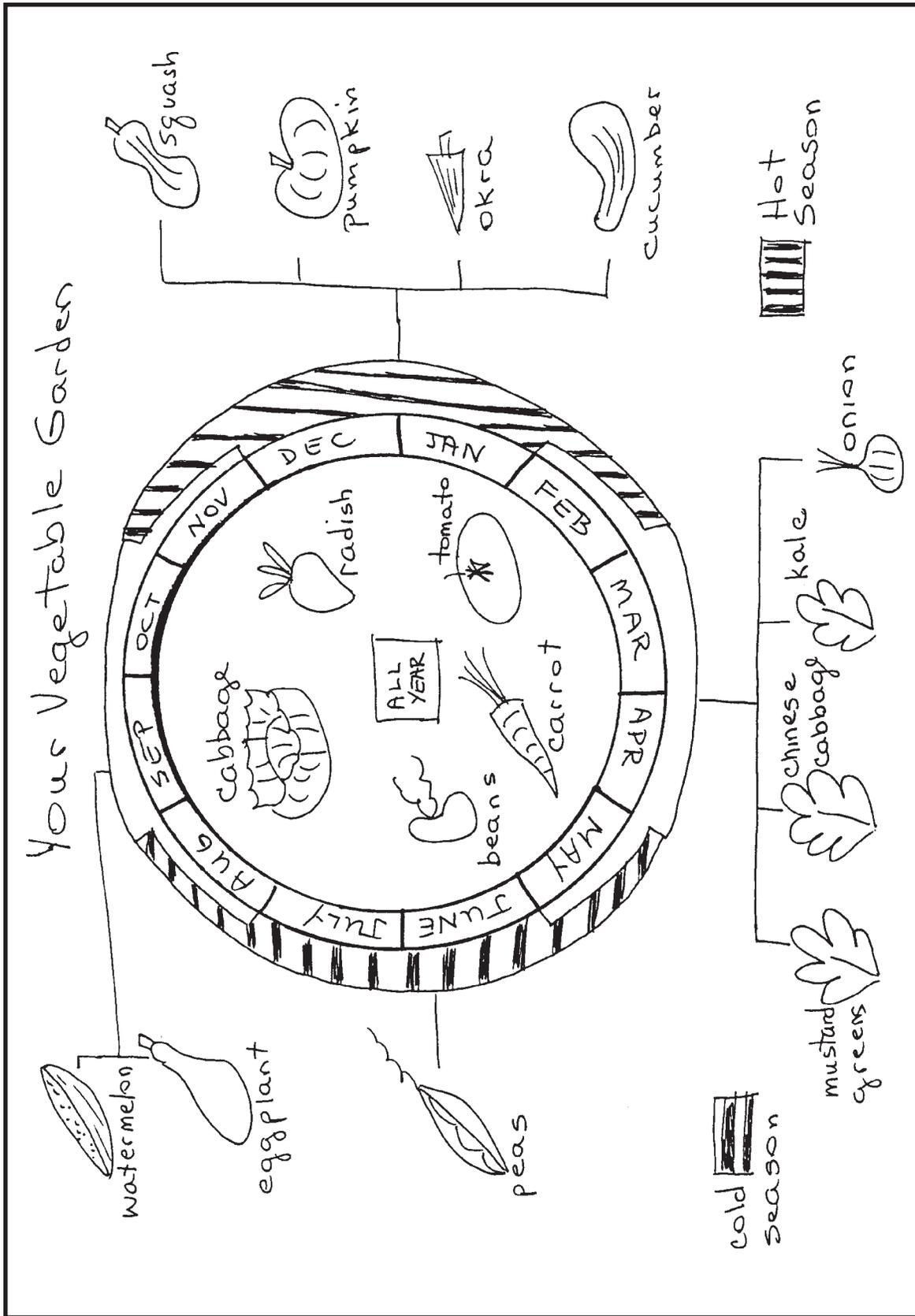
Source: Tools of Gender Analysis, page 23

# SEASONAL CALENDAR - TURKMENISTAN



WID WORKSHOP, September 20-22, 1995  
 Chardjou, Turkmenistan

# YOUR VEGETABLE GARDEN - MALAWI



# SEASONAL CALENDAR – ERITREA

At a gender and public health education in-service training for English teachers in Eritrea, teachers used participatory exercises with a group of 11 to 13 year-old boys and girls. The children were from both rural and urban, boarding and non-boarding schools. They created seasonal calendars in single-sex groups. Following the presentation of the two calendars, they discussed the two calendars in a single group.

## BOYS' SEASONAL CALENDAR

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
----- ?						***** ?					
				""""""""	rainy season	""""""""		@ Harvest @@@@			
Wed				24th							
25th				Independence Day							
Exam											
Vacation					20th-Martyr's Day						
Ramadan					20th-Exam						
	Eid Alfitir							School			
	-- Zom Arbaa -----							Fee			
	?		+++++++	Difficult Time	+++++++						
	+++++++	Diarrhea	+++++++	+++++++	+++++++	+++++++	+++++++	+++++++	+++++++	+++++++	+++++++
@ Saal @											

## GIRLS' SEASONAL CALENDAR

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
===== help in the home =====						=====					
Wed				Dig	Sow						
Exam		Women's			Water						
		Day		++ Cold Season	+++++++	+ Harvest +					
Exam				Exam	^^^ Holiday	^^^^^^					Christ- mas
	Holiday			Holiday	School	School					
				Fees		Starts					
----	Christian Holiday	-----			___ summer rains	___ ?	___	-----			

# NEEDS ASSESSMENT AND PRIORITY RANKING

## RATIONALE

This needs assessment and priority ranking technique, as it has been adapted for PACA, has direct application to the Peace Corps programming and project identification process. A gender-differentiated ranking tool, it provides the means to identify principal constraints and to elicit opportunities for project intervention based on community preferences. It can serve as an initial community planning tool as well as a monitoring and evaluation tool. This session will describe the technique in detail, provide practice in the classroom setting, and discuss the relevance to community action planning.

## TIME



1 1/2 – 2 hours

## GOAL AND OBJECTIVES

### GOAL

To introduce participants to the PACA technique of needs assessment and priority ranking.

### OBJECTIVES

1. To describe the value of this technique in identifying the gender patterns in how communities interpret their needs and establish their preferences for action.
2. To practice the technique.
3. To relate the needs assessment and priority ranking to the development of a Peace Corps project or community action plan that incorporates gender realities.
4. To develop baseline information for project monitoring and evaluation.

## SESSION OUTLINE

- I. Introduction (5 minutes)
- II. Demonstration of the technique (20 minutes)
- III. Talk through steps of the technique (20 minutes)
- IV. Practice using needs assessment and priority ranking technique (45 minutes)
  - V. Debrief of technique (15 minutes)
- VI. Application (10 minutes)

## TRAINER PREPARATION



This session relies heavily on the focus group interview, and the trainer(s) must be especially sensitive to representativeness of the group response. Some form of group consensus or majority preference must be achieved, and a high level of facilitator direction may be required in order to insure the maximum participation. As in the other PACA techniques, the trainer(s) should be attentive to the human dynamics that underlie each group decision or voting episode in order to document intra-group variation and to understand the factors that drive the decisions.

Demonstrating and practicing the technique can be done easily in the training setting. Small groups can be formed in numerous ways to show differences, by gender or otherwise.

1. Groups of male and female trainees can develop needs lists related to the training site, training content, or (in pre-service training) cross-cultural information they feel they need.
2. Groups of male and female language instructors might discuss “What would make our lives better?”
3. Groups of different staff members, such as teachers and administrators, could address a question like “What we need at the training site.” You can think of many other scenarios, depending on your training situation.

If you will both demonstrate and practice the technique during the session, select different groups to be the participants in each, e.g., the trainers for the demonstration and other training staff for the practice.

Determine who will be used for practice, and, if they are not the trainees, arrange to have them come to the training location at the appropriate time.

Read this session plan and any references listed at the end that are available in the ICE Resource Center. Ranking of needs is a critical part of this technique. If unfamiliar with pairwise ranking techniques, practice the techniques with colleagues or family members prior to training the session. The matrix is quite complicated and may be confusing for the participants. You do not have to use the matrix format as long as the pairwise ranking is recorded somehow. Be sure you are clear about and comfortable with the technique you choose to use.

## MATERIALS



- Flip chart paper
- Marking pens
- Tape
- Scissors (optional)
- Tacks or pins
- Envelopes made from paper to hold votes [optional]
- Objects for voting: corn, small slips of paper, etc. (50) [optional]

## HANDOUTS

- Needs Assessment and Priority Ranking
- Examples of different needs assessment ranking techniques:
  - Pairwise Ranking Matrix
  - Mbusyani Options Assessment Chart
- PACA Tools: Roles of Facilitators

# PROCEDURE

## I. INTRODUCTION (5 minutes)

Explain:

This session is about determining the needs of a group of people. What have been your experiences with learning about the needs of a group? How have you found out what people need? (Take examples.)

The PACA needs assessment by rank ordering technique is designed to stimulate a ranking evaluation of the constraints and opportunities by the members of the community. The technique assumes that gender differentiation may be significant and that men and women may not recognize each other's needs and priorities. As in the other PACA techniques, the men and women carry out the activity separately, then meet together to discuss and interpret the results.

## II. DEMONSTRATION OF THE TECHNIQUE (20 minutes)

Use the steps described in Section III.

## III. WALK THROUGH THE STEPS OF THE TECHNIQUE (20 minutes)

Distribute the handout "Needs Assessment and Priority Ranking" for participants to follow.

Use the additional notes below as well as examples from the demonstration as you discuss each step.

1. Introduce the idea to the community that they will be working to decide what their most important needs are. It is very important that everyone contribute his or her ideas.
2. Divide into separate groups of men and women, or by other subgroups important to the development of the lists.

The community is divided into separate gender groups so that more voices can be heard. In each group it is important that all individuals participate in the consensus-building that this technique requires. It is important that the needs assessment be representative (or maximally so) of the group and not of any one individual in the group.

3. Ask: What prevents you from having a better life? (or a more appropriate question for the particular group). Write ideas on the flip chart as they are mentioned.

Allow the participants to question each other and discuss the ideas as they are presented; this is valuable in clarifying issues. Don't remove items from the list, however, unless the whole group wants them removed. Encourage them to list everything they wish to.

4. Once the list is made, the participants are asked to elaborate further on each issue, as necessary. For example, there may be one or two items that seem to be the same. They need to be clarified; if appropriate, two or more ideas can be combined into one issue.

5. Once the list is made, the needs are rank ordered. If there are more than six items on the list, have the group members vote to get the top five or six items.

Each community participant is given two or three votes to place on those constraints deemed most critical to him or to her. A tally of votes generates the ranking. If there is concern that hand-raising voting will be influenced by certain persons, people can vote by dropping markers (seeds of corn, pebbles, small squares of paper) in envelopes attached next to each item, or some other way to make voting private.

6. With the top six or fewer items, conduct a pairwise ranking to get a final ranking. Ask members to reach a consensus regarding the comparison of each pair of needs they have identified. In seeking consensus on each pair comparison, watch for the variability of opinion as it will be important information as you continue to work with the group.

Two pairwise ranking methods:

- a. In chart form, the items are listed both down and across a chart. Each item is compared to every other. The more important of the two items is noted in the cell where the two items intersect. The constraint that appears most in the matrix cells is considered the most critical by the community.

	<b>LACK OF CLINIC</b>	<b>POOR LAND</b>	<b>NO MARKET</b>
<b>LACK OF CLINIC</b>	X	Poor land	Lack of clinic
<b>POOR LAND</b>	X	X	Poor land
<b>NO MARKET</b>	X	X	X

- b. Pairwise ranking also can be done directly from the list.

**original list**

- lack of markets
- unfinished school
- poor soil
- lack of clinic

**noted on list**

- lack of markets | | |
- unfinished school |
- poor soil |
- lack of clinic |

Begin with the top item, saying “Which is more important, lack of markets or unfinished school?” Put a hash mark after the item of the pair deemed most important. “Which is more important, lack of markets or poor soil?” Continue until all pairs have been compared and notes made. Count the hash marks next to each to rank them.

- c. The pairwise ranking can be done again, based on which items have the most possibility for action by the community. This second step often helps move the group to the next stage of project planning.
7. If this activity is being used with a community to develop an action plan, when the ranking has been completed each group is asked to assess possible responses to these constraints

given resource scarcity. These suggestions constitute the beginnings of a community action plan. The output of each group is thus a rank ordering of constraints and a set of strategies to overcome them.

The groups are asked to evaluate these proposed solutions in terms of both financial and technical feasibility. The handout “Mbusyani Options Assessment Chart” shows a way of doing this.

8. Bring the men’s and women’s groups together. Post their needs lists side-by-side where everyone can see them. Ask someone from each group to explain his or her list. Then facilitate a discussion:
  - a. What are the similarities and differences? Why might those be?
  - b. What relationships are there between the items?

A community member can lead the discussion or interpretation, if willing.

Where lists contain different items, why the items appear only on one list might be discussed, as may the relationship between the items on the two lists.

If this is the first step toward community action, the facilitator attempts to mediate a consensus on a compromise plan of action for the entire community.

9. Draw session to a close with an indication of what the next steps will be, such as another meeting to explore the needs further, etc.

If desired and time permits, spend a few minutes talking about how two groups of needs might be resolved. Ask:

How can we get the community to address both lists? Ideas might include:

- Find common ground
- Get conflict out into open
- Evaluate resources
- Empower each group to speak for itself; explain its needs
- Look for most immediate needs
- Look for ease in implementation (something easier that will build confidence)
- Consider if an idea is possible: consider the implications and impact
- Seek total involvement: look for a way to meet some needs on all lists

Look back at the lists and

- Identify something that is common.
- How could you begin to address this?
- What else do we know that impacts on this need?
- Is this the most immediate need? How can we determine that?

Ask:

Have any of you used a participatory needs assessment and priority ranking technique? If so, what were your experiences?

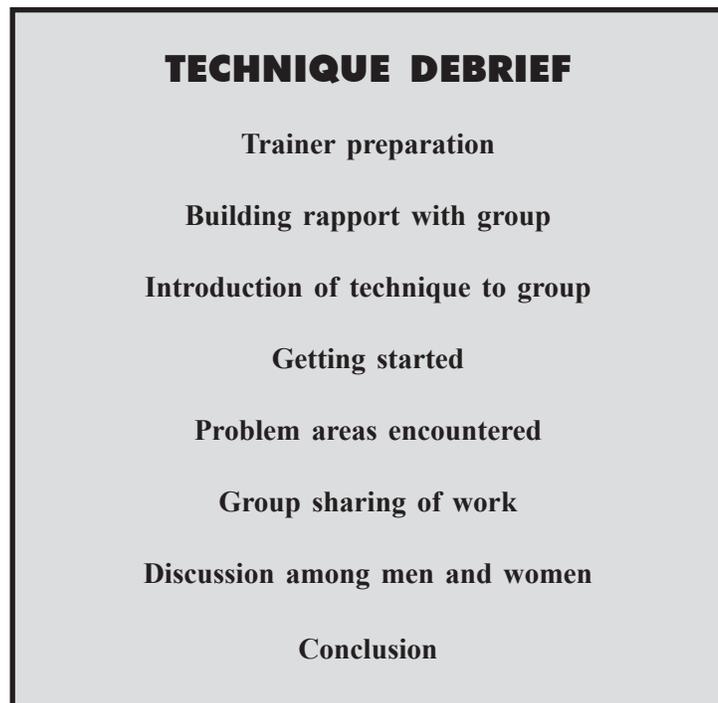
#### IV. PRACTICE USING NEEDS ASSESSMENT AND PRIORITY RANKING TECHNIQUE (45 minutes)

Explain to trainees with whom they will practice. Distribute the handout “PACA Tools: Roles of Facilitators” and discuss it. Have them determine who will take the different roles during practice. Have as many trainees take roles as possible; they can divide up the steps of the technique. Give them a few minutes of preparation time.

Have the trainees carry out the needs assessment and priority ranking process.

#### V. DEBRIEF OF TECHNIQUE (15 minutes)

Using the points on the “Technique Debrief” flip chart, debrief how their practice went. Discuss ways to improve areas of weakness or confusion.



#### VI. APPLICATION (10 minutes)

Discuss settings where the trainees might use this technique.

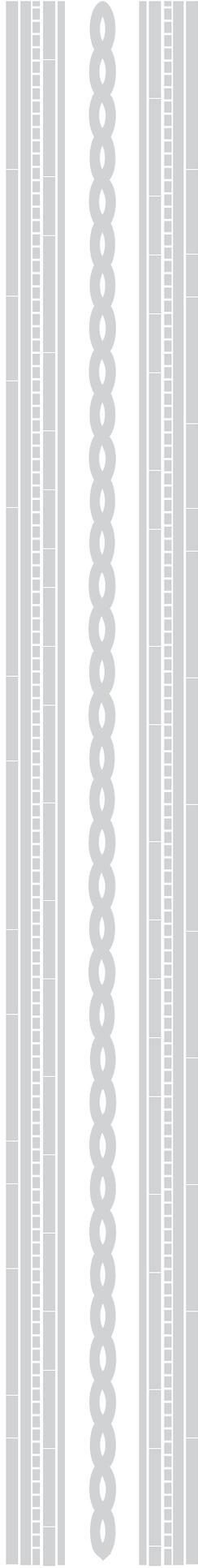
Provide examples to show how this can lead to a community action plan as well as be used for the community’s monitoring and evaluation of a project.

#### REFERENCES



Thomas-Slayter, Barbara, Esser, Andrea Lee, and Shields, M. Dale. *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management* (ECOGEN, USAID, 1993), pp. 12-13.

**NOTES** 



# NEEDS ASSESSMENT AND PRIORITY RANKING

## OBJECTIVES

1. To describe the value of this technique in identifying the gender patterns in how communities interpret their needs and establish their preferences for action.
2. To practice the technique.
3. To relate the needs assessment and priority ranking to the development of a Peace Corps project or community action plan that incorporates gender realities.
4. To develop baseline information for project monitoring and evaluation.

## MATERIALS



- Blank flip chart paper
- Tape
- Markers
- Objects for voting (optional)

## PROCEDURE



1. Introduce the idea to the community that they will be working to decide what their most important needs are. It is very important that everyone contribute his or her ideas.
2. Divide into separate groups of men and women, or by other subgroups important to the development of the lists.
3. Ask: What prevents you from having a better life? (or a more appropriate question for the particular group). Write ideas on the flip chart as they are mentioned. Allow the participants to question each other and discuss the ideas as they are presented; this is valuable in clarifying issues. Don't remove items from the list, however, unless the whole group wants them removed. Encourage them to list everything they wish to.
4. Once the list is made, the participants are asked to elaborate further on each issue, as necessary. For example, there may be one or two items that seem to be the same. They need to be clarified; if appropriate, two or more ideas can be combined into one issue.
5. Once the list is finalized, the needs are rank ordered. If there are more than six items on the list, have the group members vote to get the top five or six items.

Give each participant two or three votes to place on those constraints deemed most critical to him or to her. A tally of votes generates the ranking. If there is concern that hand-raising voting will be influenced by certain persons, people can vote by dropping markers (seeds of corn, pebbles, small squares of paper) in envelopes attached next to each item, or some other way to make voting private.

6. With the top six or fewer items, conduct a pairwise ranking to get a final ranking. Ask members to reach a consensus regarding the comparison of each pair of needs they have identified. In seeking consensus on each pair comparison, watch for the variability of opinion as it will be important information as you continue to work with the group.

Two pairwise ranking methods:

- a. In chart form, the items are listed both down and across a chart. Each item is compared to every other. The more important of the two items is noted in the cell where the two items intersect. The constraint that appears most in the matrix cells is considered the most critical by the community.

	<b>LACK OF CLINIC</b>	<b>POOR LAND</b>	<b>NO MARKET</b>
<b>LACK OF CLINIC</b>	X	Poor land	Lack of clinic
<b>POOR LAND</b>	X	X	Poor land
<b>NO MARKET</b>	X	X	X

- b. Pairwise ranking also can be done directly from the list.

original list

- lack of markets
- unfinished school
- poor soil
- lack of clinic

noted on list

- lack of markets |||
- unfinished school |
- poor soil |
- lack of clinic |

Begin with the top item, saying “Which is more important, lack of markets or unfinished school?” Put a hash mark after the item of the pair deemed most important. “Which is more important, lack of markets or poor soil?” Continue until all pairs have been compared and notes made. Count the hash marks next to each to rank them.

- c. The pairwise ranking can be done again, based on which items have the most possibility for action by the community. This second step often helps move the group to the next step of project planning.
7. If this activity is being used with a community to develop an action plan, when the ranking has been completed each group is asked to assess possible responses to these constraints given resource scarcity. These suggestions constitute the beginnings of a community action plan. The output of each group is thus a rank ordering of constraints and a set of strategies to overcome them.
  8. Bring the men’s and women’s groups together. Post their needs lists side-by-side where everyone can see them. Ask someone from each group to explain the group’s list. Then facilitate a discussion:
    - a. What are the similarities and differences? Why might those be?
    - b. What relationships are there between the items?
  9. Draw session to a close with an indication of what the next steps will be, such as another meeting to further explore the needs, etc.

# PAIRWISE RANKING MATRIX

PROBLEMS	CLIMATE	PESTS	WEEDS	COST OF INPUTS	LACK OF LAND	LACK OF IRRIG.	LACK OF TECH. K.
CLIMATE		CLIMATE	CLIMATE	COST OF INPUTS	CLIMATE	CLIMATE	CLIMATE
PESTS			PESTS	COST OF INPUTS	LACK OF LAND	LACK OF IRRIG.	PESTS
WEEDS				COST OF INPUTS	LACK OF LAND	LACK OF IRRIG.	WEEDS
COST OF INPUTS					COST OF INPUTS	COST OF INPUTS	COST OF INPUTS
LACK OF LAND						LACK OF LAND	LACK OF LAND
LACK OF IRRIGATION							LACK OF IRRIG.
LACK OF TECH. KNOWHOW							

PROBLEMS	NUMBER OF TIMES PREFERRED	RANK
CLIMATE	5	2
PESTS	2	5
WEEDS	1	6
COST OF INPUTS	6	1
LACK OF LAND	4	3
LACK OF IRRIGATION	3	4
LACK OF TECHNICAL KNOWLEDGE	0	7

Source: *Participatory Rural Appraisal Handbook*, page 64.

# MBUSYANI OPTIONS ASSESSMENT CHART

BEST BET OR INNOVATION	PRODUCTIVITY	STABILITY	SUSTAINABILITY	EQUITABILITY	TIME TO BENEFIT	COST	TECHNICAL SOCIAL FEASIBILITY	PRIORITY
BOREHOLES	?	0	-	0	3	3	3	6
ROOF CATCHMENT	+	+	++	+	1	1	2	3
NATURAL SPRINGS	+	+	+	++	1	2	2	
REHABILITATE DAMS	++	+	++	++	1	2	2	
SHALLOW WELLS	+	+	++	0	2	1	2	
NEW SURFACE DAMS	++	+	++	++	1	2	2	

KEY

?	UNKNOWN
-	NEGATIVE IMPACT
0	NO IMPACT
+	POSITIVE IMPACT
++	VERY POSITIVE IMPACT

	TIME	COST	FEASIBILITY
3	LONG	HIGH	LOW
2	MEDIUM	MEDIUM	MEDIUM
1	SHORT	LOW	HIGH

Source: *Participatory Rural Appraisal Handbook*, page 65.

## **PACA TOOLS: ROLES OF FACILITATORS**

### **I. INTRODUCTION TO THE COMMUNITY**

- A. Introduce facilitators and their purpose.
- B. Have community members introduce themselves.
- C. Do an icebreaker, unless it will be done in separate groups.
- D. Describe the tool(s) to be used.
- E. Divide into groups and send them to their work locations.

### **II. FACILITATION OF SEPARATE WORK GROUPS (IN EACH GROUP)**

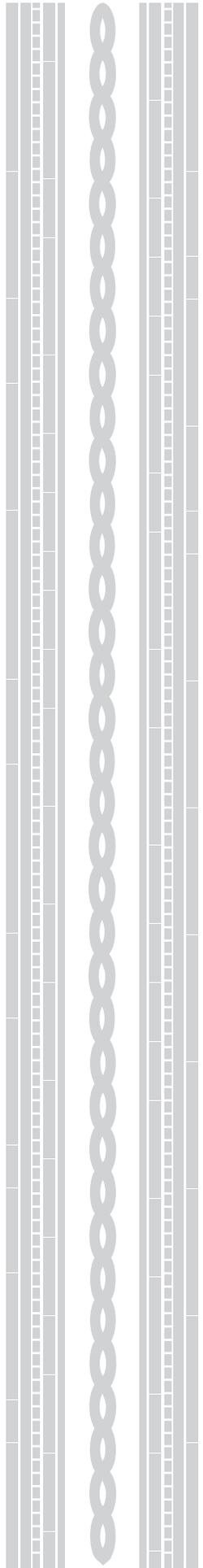
- A. Do an icebreaker, unless done above.
- B. Make name tags and put them on, if the facilitator and group members don't know each other.
- C. Facilitate the technique: daily activities, seasonal calendar, community mapping, or needs assessment and priority ranking.
- D. Prepare the group to share its work with the others.

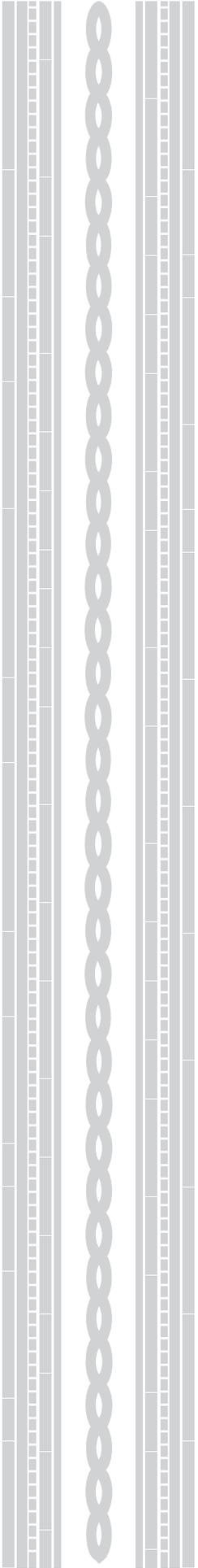
### **III. FACILITATION OF LARGE GROUP MEETING**

- A. Ask each group to present its work to the others and answer questions.
- B. Encourage a group member to facilitate, or you facilitate, the discussion questions related to the technique.
- C. Summarize the technique and learnings, talk about next steps, thank the community.

## **SECTION 5: COMMUNITY FIELD WORK WITH PACA**

Though practice with participatory processes in communities is essential to understanding the power of the process and the skills needed to carry it out, there are many ethical concerns with using communities for training purposes. One session plan addresses the selection and preparation of communities as well as the preparation of the training participants for the community experience. Another provides a detailed debriefing for the training participants to maximize their learning from the experience.





# PREPARATION FOR COMMUNITY FIELD WORK

## RATIONALE

The field application bridges the critical gap between training concepts and local community realities. At this point in the training, it is necessary to demonstrate how the PACA techniques are in fact implemented in the field setting. The experience moves from designing participation to achieving participation.

## TIME



1 1/2 – 2 hours

## GOAL AND OBJECTIVES

### GOAL

To provide participants the opportunity to apply the PACA methodologies in a community setting.

### OBJECTIVES

1. To demonstrate the effectiveness of the participatory approach in analyzing community constraints and opportunities.
2. To provide the participants the opportunity to practice their newly acquired skills.
3. To integrate the local community into the training process.
4. To generate a valid PACA participation with the community.

## SESSION OUTLINE

- I. Introduction to the community field work (20 minutes)
- II. Preparation for community field work (30 minutes)
- III. Team preparation (30 minutes)
- IV. Report out of team preparation (15 minutes)

## TRAINER PREPARATION



1. Select and prepare the community(ies).

The preparation for the field day is key to the success of the experience. The participants receive their preparation for practicing each PACA technique in a simulated environment prior to the

field application. In a similar sense, the trainers must prepare the local communities for the field day. As a general rule, the trainer(s) should contact the community at least one month before the field experience in order to explain the purpose of the field day, elicit their voluntary and **willing** participation in the experience, explain the techniques and their procedural steps, and prepare the logistics of the field day. The community should be familiar with the Peace Corps and either have a Peace Corps Volunteer (Volunteer) currently working there or with a plan to place a Volunteer there in the near future. At least two visits to the community need to be made prior to the field work, the second visit within a week of the field work to reconfirm all of the arrangements made previously.

Specific suggestions include:

- a. Selection of the community(ies):
  - The community should be representative of the communities targeted by the Peace Corps for programming.
  - Select a community where the Peace Corps is actively known, expects to have a presence, and, if possible, use local Volunteer support.
  - For manageability, the community (rural village or urban neighborhood) should be relatively small; fewer than 300 households is ideal.
  - When more than one community is used, communities with differing characteristics should be selected in order to expand the application of the techniques.
  - Care must be given to select communities in which inhabitants are available, i.e., not occupied by peak season labor demands, feast days, etc.
  - Both men and women should be queried as to their availability, time preferences, willingness to participate, and so on.
- b. Procedural details: [to be explained to community contacts]
  - If two or more techniques are applied in a given community, a minimum number of available participants is required, but not everyone all day. If one technique is done in the morning and another in the afternoon, two groups of about 20 men and two groups of about 20 women will be required—one group of each sex in the morning, then a second group of each sex in the afternoon.
  - It is necessary to consider the representativeness of the community participants in order not to exclude participation by criteria of ethnicity or socioeconomic status.
  - Two separate areas or meeting rooms are preferable, or at least enough space so that two (or more) separate groups can meet without overhearing or disturbing each other.
  - At the end of each technique, men and women rejoin to interpret the results and to give recommendations. This can be done in one of the two meeting areas or in a larger accommodation.
  - If a lunch or dinner is planned, it must be scheduled so as to include both morning and afternoon groups. This is a way to thank the community members for their time and to permit a more social environment for community members and trainees to be together, unless it would be culturally inappropriate or set a bad precedent. Funds for a meal should be provided via the training event budget.

c. Other hints:

- Use the local informal leadership to prepare the community: perhaps invite community representatives to the training prior to the field day.
- Make sure dates and arrival times are clearly understood, and training participants are punctual.
- Upon arrival, a selected member of the training group should make a detailed explanation of the field day plan.
- At the end of the day, a selected member of the training group should thank the community, talk about how the work will be helpful to both the community and the Peace Corps, and present culturally appropriate gifts (if dictated).

2. Select teams of trainees.

It is usually best to pre-select the teams of trainees going to the different communities or who will work together within one community. This will ensure that there are people with community experience in each team, a balance of quieter and more assertive people, as well as gender balance. If interpretation is needed, appropriate team members for this role must also be selected.

3. Schedule one-half day only of community work (optional, but not preferred)

If only a half day is available for community work, it is possible to do two techniques at the same time. A diagram showing how such a schedule proceeds is provided as the “Diagram of Community Field Work Sequence” handout. As this is quite complicated to visualize, it is important to distribute the handout and discuss it with trainees prior to their preparation work.

## MATERIALS



- All the materials needed for each PACA tool that will be used (See list of materials on “Team Task” handout)
- Camera for prints and/or slides, as desired
- Video camera and blank tapes, if appropriate
- Gifts for the community, if appropriate

## HANDOUTS

- Diagram of Community Field Work sequence (half-day field-based experience) (optional)
- Profile of each community to be visited, if desired (prepare at post)
- Trainee Teams for Field Work (or list on flip chart) (organize at post)
- Team Tasks for Community Field Visits
- Topic Outline (urban or rural)
- Logistics Information for Going To and From Communities (prepare at post)

# PROCEDURE

## I. INTRODUCTION TO THE COMMUNITY FIELD WORK (20+ minutes)

Describe in detail the community(ies) that have been chosen, and the arrangements that have gone into the preparation of the communities. This can best be done by the person who has made the community contact. A handout with data about each community is useful.

Announce the training teams that will work together. This may be done via a handout that accompanies the data on the appropriate community or listed on a flip chart.

## II. PREPARATION FOR THE COMMUNITY FIELD WORK (30 minutes)

Distribute the “Team Tasks for Field Visits” handout and go over each point.

Discuss what teams must complete by the end of the session to be prepared for the community field work.

As a total group, determine a list of things you can do while there is free time in the community, e.g., if you have time before the opening session, if a group may not be able to start meeting for a while, if there is some time before or after lunch. This list might include walking through the neighborhood or village with a community member with that person describing what they are seeing, visiting someone’s place of business or fields, or visiting a school, clinic, or other institution.

Distribute the “Topic Outline” handout that applies to the community(ies) selected (urban or rural). Suggest that these are types of information you may learn informally as well as through the techniques you are using.

Explain the logistics of the community field work, including times of departure and return, meal arrangements, suggested dress, etc. These details may be presented in a handout.

Ask if there are any questions about any phase of their preparation, the logistics, etc., of the field work.

## III. TEAM PREPARATION (30+ minutes)

Explain that teams are to meet and complete their preparation, according to the “Team Task” handout. Indicate where the supplies are located. State that you and the other trainer will circulate to answer questions and help as needed. Stress that all team members must have all preparations done before departing for the community.

## IV. REPORT OUT OF TEAM PREPARATION (15 minutes)

Bring the groups back together. Ask each team to report how it plans to carry out its community field work. Each trainer should note who is responsible for each task in the community they will visit.

**When they are totally prepared for the following day**, or have made individual assignments for preparation of materials, dismiss for the evening.

## REFERENCES

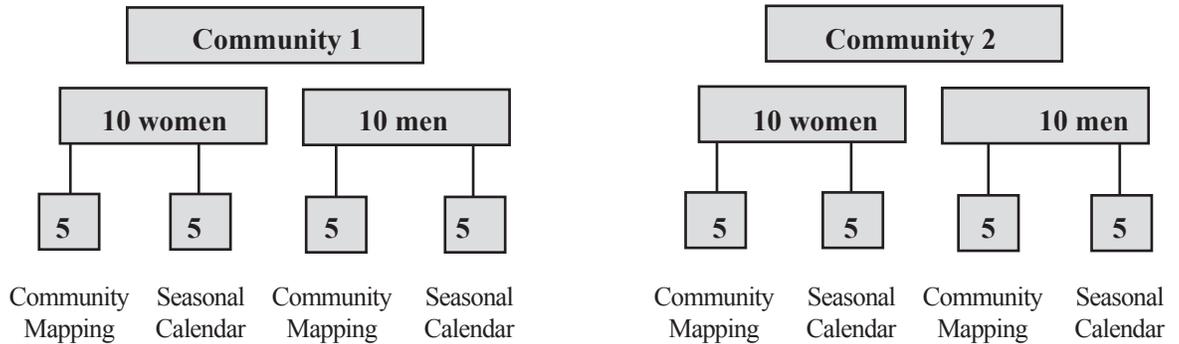
“PACA Tools Session Plans” (Section 4)

Sims Feldstein, Hilary, and Jiggins, Janice, eds. *Tools for the Field: Methodologies Handbook for Gender Analysis in Agriculture* (Kumarian Press, 1994).

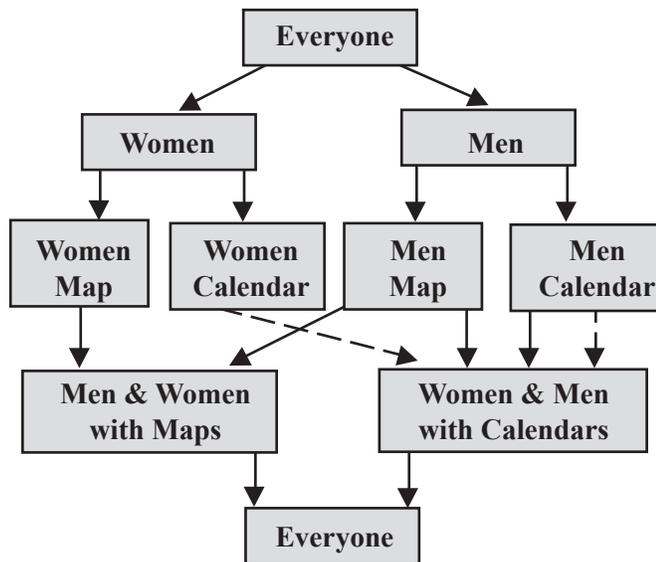
## NOTES

# DIAGRAM OF COMMUNITY FIELD WORK SEQUENCE (HALF-DAY FIELD-BASED EXPERIENCE)

## DIVISION OF COMMUNITY MEMBERS INTO GROUPS



## SCHEDULE WITHIN COMMUNITIES



Welcome, Introductions,  
Explanation of Purpose

Icebreaker, name tags  
division into two groups

Participatory Techniques

Men and women doing same  
technique meet together to  
share and discuss

Each group presents its  
work to other groups; discuss  
what it means; what was  
valuable to them by doing  
this

Closure

## TEAM TASKS FOR COMMUNITY FIELD VISITS

Discuss exactly what your team will do during the community field work. Discuss each item below, assigning names to roles. Do all of the tasks described. **Be totally prepared to begin when you arrive in the community.**

1. Which PACA technique(s) will you use? [The workshop trainer may predetermine this.]
2. Which trainees will play the various roles during the field work? **All trainees must have at least one specific “training” role:**
  - Who will introduce the field activities to the community?  
Develop an outline and discuss it with the trainer.
  - Who will introduce each activity to a group of men or women and take the lead in facilitating the activity? (There are four times this role must be taken. As many different trainees as possible should take this role at one time or another.)
  - How will the other trainees on the team assist with each activity?
  - Which trainees will be observing interpersonal behaviors between community members?  
Between community members and trainees?
  - Who will facilitate the meeting and presentations, discussion between the men’s and women’s groups for each activity?
  - Who will interpret? How will the interpretation take place—simultaneously or sequentially?  
If the interpreter is not a part of the workshop, who will be responsible for briefing him or her about each of the activities before they take place?
  - Who will thank the community formally, including presentation of a gift, if appropriate?
  - Who will videotape and take photographs, if appropriate?
3. Once roles are determined, discuss in detail how you will conduct each exercise: who will say and do what? How will others assist? Select and practice your icebreaker.
4. Determine which supplies are needed for each activity you will conduct, including icebreakers, name tags, etc. Decide who is responsible for making anything that must be prepared in advance, collecting and taking all of the supplies. Check the list of materials provided on the next page.
5. Practice your roles **before** you leave for the community.



## MATERIALS LIST, BY PACA TECHNIQUE

### COMMUNITY MAPPING

- Flip chart paper
- Large markers – several colors
- Glue stick
- Scissors
- Tape
- Tacks or pins

According to data to be included on the community map: (choose **no more than** three, maximum)

1. For frequency: 50 small pieces of each of three different colors of paper
2. For likes and dislikes: 20 additional pieces of two other colors than used for frequency
3. For needs: two small pads of sticky notes or small squares of paper
4. For relative importance: three sizes of colored circles, one set for each participant

#### Note:

Be sure the same items are included and the same colors used on maps created by different groups in the same community. Create a legend for the maps that will be added after they are finished.

### SEASONAL CALENDAR

- Flip chart paper
- Large markers – several colors
- Small markers – several colors
- White paper rectangles, 2"x3" (40)
- Glue stick
- Scissors
- Tape
- Tacks or pins

### NEEDS ASSESSMENT

- Flip chart paper
- Large markers – several colors
- Scissors (optional)
- Tape
- Tacks or pins
- Envelopes made from paper to hold votes (optional)
- Objects for voting: corn, small slips of paper, etc. (50) (optional)

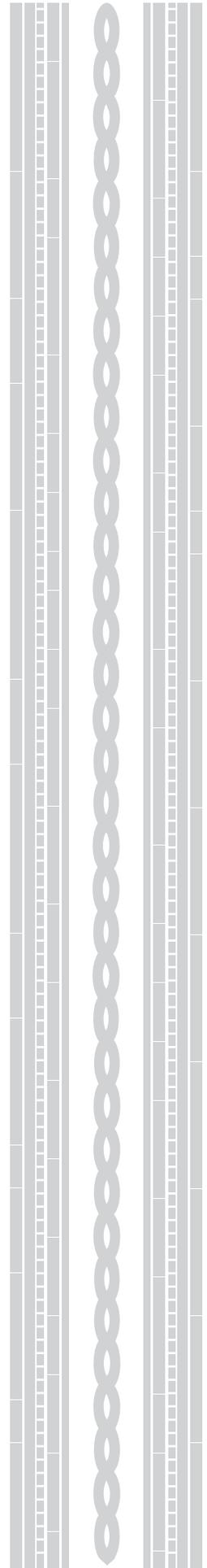
### DAILY ACTIVITY SCHEDULES

- Flip chart paper
- Large markers – several colors
- Tape
- Tacks or pins

# TOPIC OUTLINE FOR URBAN COMMUNITY FIELD WORK

## A. THE HOUSEHOLD

1. A typical family
  - large or small (average number of people, or range)
  - roles and responsibilities
  - composition of the families
  - education
  - distribution of family tasks: productive, reproductive, social
2. Resources available to the family
  - house or apartment: owned or rented
  - land: owned or rented, large or small
  - land in one place or different places
  - fruit and vegetable gardens, pastures
  - store, shop, or other place of business: owned or rented
  - employment
3. Access to infrastructure
  - electricity
  - water
  - telephone
  - markets: food, clothing
  - education (primary, secondary, post-secondary, vocational)
  - health services
  - representatives of government
  - sports fields
4. Credit
  - bank
  - informal
  - intermediaries
  - family
5. Economic activities
  - formal economy: wages (who in the family)
  - informal economy
  - home-produced food, animals, products for sale
  - remittances from family living elsewhere
6. Decision-making
  - who decides what
  - who is responsible for the income and expenses



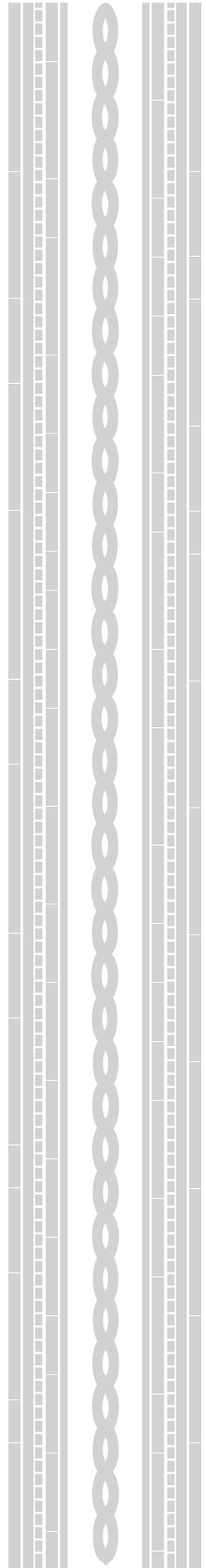
**B. THE COMMUNITY**

1. Schools
2. Child care
3. Health clinic, hospital
4. Water and sewage system
5. Distribution and location of houses
6. Associations
7. Churches
8. Transportation

# TOPIC OUTLINE FOR RURAL COMMUNITY FIELD WORK

## A. THE HOUSEHOLD

1. A typical family
  - large or small (average number of people, or range)
  - roles and responsibilities
  - composition of the families
  - education
  - distribution of family tasks: productive, reproductive, social
2. Resources available to the family
  - land: estimated size
  - land in one place or different places
  - fruit and vegetable gardens
  - pastures
  - forests
  - fields
  - water, source of water
3. Small and large animals
  - size of herd
  - location
  - animal feed
  - available corrals, pens, coops, etc.
4. Access to infrastructure
  - electricity, telephone, roads
  - institutions: schools, representatives of government, health center, local industries, markets, stores
  - sports fields
5. Credit
  - bank
  - informal
  - intermediaries
  - family
  - non-agricultural income: sales, crafts
  - agriculture products to sell
  - animals to sell
  - remittances from family living elsewhere
  - salaried work



6. Economic activities
  - non-agricultural income: sales, crafts
  - agriculture products to sell
  - animals to sell
  - remittances from family living elsewhere
  - salaried work
7. Decision-making
  - who decides what
  - who is responsible for what income and which expenses

## **B. THE COMMUNITY**

1. School
2. Health center
3. Sources of water
4. Distribution or location of houses
5. Associations
6. Churches
7. Natural resources: deforestation, land
8. Transportation

# DEBRIEF OF COMMUNITY FIELD WORK

## RATIONALE

The community field work debriefing consolidates the field experience, allowing the participants to analyze the information gained through observation, informal interviews, and introduction of PACA tools. At this point in the training, the participants integrate actual field experience into the topic outline, Gender Information Framework (GIF), or other data collection tools. They analyze the quantity and quality of information gathered and their reactions to the techniques used. This session may include a demonstration of the needs assessment tool.

## TIME

3-5 hours, depending if the needs assessment tool and priority ranking is taught through this session.

## GOAL AND OBJECTIVES

### GOAL

To incorporate the field experience into the community analysis process as an applied strategy to enhance programming and project identification.

### OBJECTIVES

1. Share the information gained by various team members who worked in the same community; describe the community.
2. Analyze the gender differences that emerged from each technique; define the important role of gender in family or community change and development.
3. Evaluate the participatory effectiveness of the techniques and their level of confidence in using the tools.

## SESSION OUTLINE

- I. Description and sharing (2 hours)
- II. Reactions to the PACA tools (20 minutes)
- III. Analysis of the results (1-2 hours)
- IV. Evaluation of the techniques and the community field work (30-45 minutes)

## TRAINER PREPARATION

As trainer(s) facilitate the processing of a large quantity of information, she or he must be particularly observant during the field experience, not only to incorporate “content” information derived from the techniques but also to observe the interactions among the training participants, and between training participants and community members. The nature of the group dynamics should be discussed in the debriefing session.

Also, the trainer(s) should be sensitive to the allocation of time. The tendency is to over-invest in the descriptive part of the session and to under-invest in the analysis and applications components. Likewise, if one or more participants had difficulties facilitating their techniques, they may be quite frustrated. If possible, move through the descriptive phase before talking about the frustrations. That will allow them to see how much information was actually transmitted and alleviate the initial sense of dissatisfaction. However, if frustration is very high, begin by describing the experience, and then move to what was learned.

Determine which option will be used in Section III. Analysis of the Results.

## MATERIALS

- Blank flip charts
- Marking pens
- Masking tape
- Visual aids prepared in each community
- VCR and tapes made in communities, if any
- Materials for needs assessment demonstration, if used  
(see “Needs Assessment and Priority Ranking” session plan – pages 139-150)

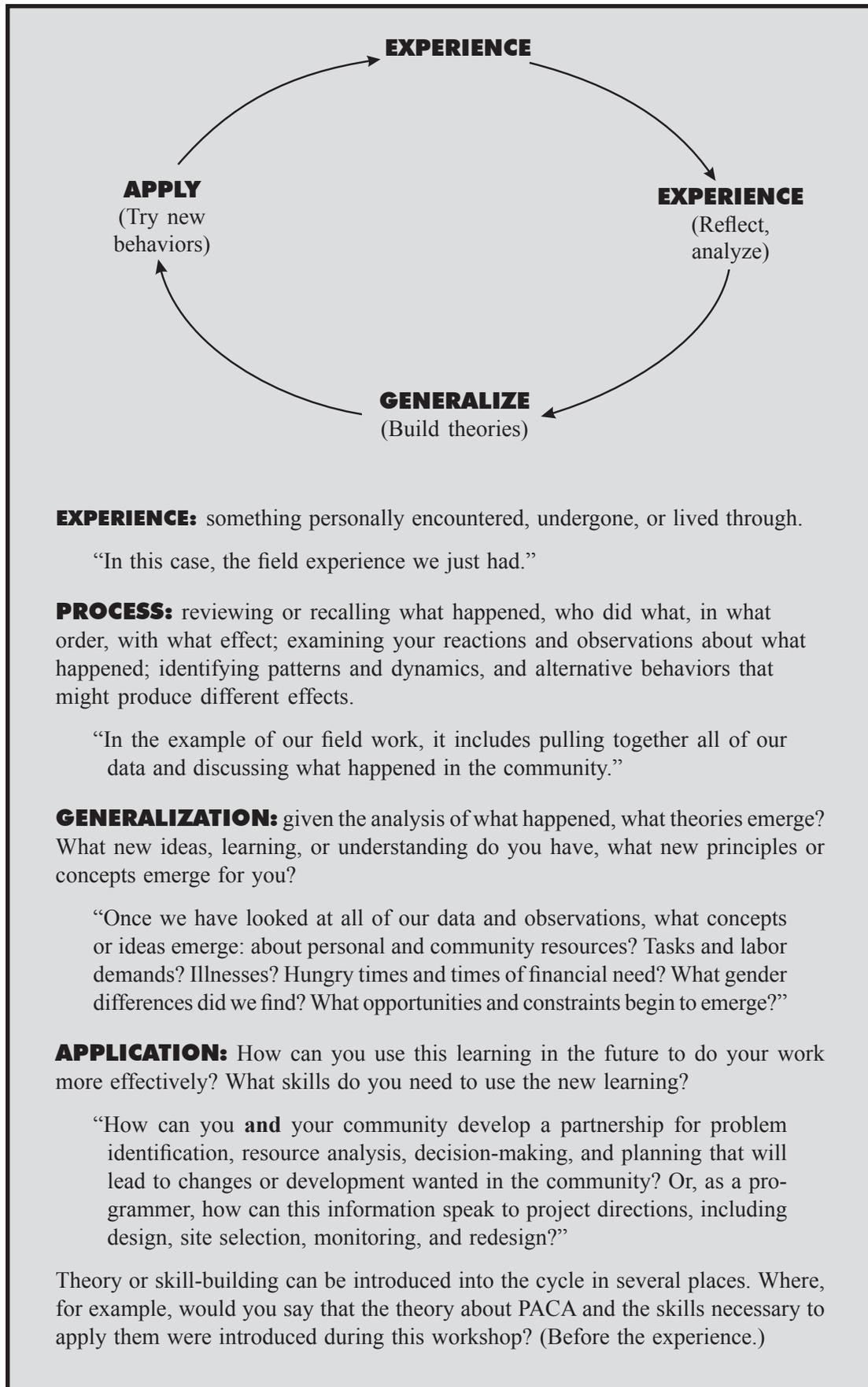
## HANDOUTS

- Topic Outline (Urban or Rural), distributed prior to community field work
- Experiential Learning Model
- Debriefing Task # 1
- Debriefing Task # 2
- Gender Information Framework Worksheet
- Needs Assessment and Priority Ranking, if introduced (pages 146-149)
- Debriefing Task # 3

## PROCEDURE

### I. DESCRIPTION AND SHARING (2 hours)

Introduce the process that will be used to debrief the experiences in the field by explaining the experiential learning model. Distribute the “Experiential Learning Model” handout.



We had an experience yesterday in communities. The first part of this session focuses on the process phase and will involve discussion in training teams by the communities in which you worked. There will be one hour of discussion in team groups, and 20-minute presentations of major points of information gained to the other team(s).

Distribute the handout “Debriefing Task #1.” Allow time for reading and then answer questions.

Once groups start working, monitor them for time and give a 10-minute warning before the reporting period begins.

## **DEBRIEFING TASK # 1:**

### **Description of the Community**

You have an hour to discuss and note all the information you obtained in your community. Use the “Topic Outline” handout and the visuals you brought back from your community.

1. Begin with the “Topic Outline” handout. (Ask one person to keep notes for the group.) Discuss each topic and note what you learned. Information may have been learned through the general community meetings, talking one-to-one with people in the community, observations, or come out of the tools you used. Do not guess at information you do not know. Leave blanks where you do not have sufficient information.
2. What information came out of each activity or technique? (The recorder adds any additional information to the topic outline.) Show each other the flip charts done in each exercise, share the information that came up in the discussions after the techniques by men and women, look for your own interpretations, including gender differences, and summarize the information.
3. What did the observer(s) notice about each of the following:
  - Dynamics among community members
  - Dynamics among training participants
  - Dynamics between community members and training participants
  - Dynamics between other outsiders, such as extension agents, and the community
4. What other information was gained about the community? By what means? Summarize it.
5. Prepare to report to the entire group. You will have 20 minutes to make your report, so plan to present an overall summary of the community, and then highlight what was learned from the tools.

All the visual materials prepared during the field experience (by the respective communities) should be displayed around the room.

After all reports are done, conduct a brief question and answer session or discussion of what has been presented. Be careful, however, not to encroach on next steps in this session.

## II. REACTIONS TO THE PACA TOOLS (20 minutes)

Discuss their general reactions to using the tools. What worked well? What was difficult? What would they want to do differently the next time? (If possible, do this discussion on a reaction or feeling level. More in-depth evaluation happens in the final step of the session.)

## III. ANALYSIS OF THE RESULTS (1-2 hours, depending on which option is chosen)

This segment calls for an analysis and an interpretation of the gender differences in the information. Begin this segment by indicating that they will be making a progression from data collection to analysis of data. To do this, they will be focusing on the information gained from the point of view of one group within the community only.

Training participants work in the same teams as in Section I. In this step, they are to try and imagine that they are the people in the community they visited. They will divide themselves into two groups, one representing the women of the community, the other representing the men.

Spending approximately 20 minutes working as gender groups, they will use the Gender Information Framework to identify gender differences in their community, including constraints and opportunities as they can imagine them.

Distribute the handout “Debriefing Task #2,” below, and answer any questions. Distribute the “Gender Information Framework Worksheet” handout.

### **DEBRIEFING TASK # 2:**

#### **Analysis of Gender Difference in the Community**

Divide yourselves into two groups: one group representing the men of the community, the other group the women. Using the “Gender Information Framework Worksheet” handout:

1. Discuss and list by gender the data gathered in each category of the explanatory factors.
2. Discuss what the community said about the gender differences, constraints, and opportunities.
3. Summarize your analysis of the gender differences, constraints, and opportunities.
4. Be prepared to represent your gender group’s realities in the next exercise.

(continued)

At the end of the 20 minutes, two options are possible.

- A. Have each gender group briefly explain:
  1. their roles, responsibilities, and rights within their family and community, and
  2. what they see as constraints and opportunities for their gender group in terms of bettering the lives of their families.
  
- B. Role play one of the communities doing the needs assessment and priority ranking tool. Explain that they will have an opportunity either to role play their gender groups with a trainer playing the role of a facilitator in the community doing the needs assessment and priority ranking tool, or observe how the needs assessment and priority ranking tool can be used.

Two trainers (or trainees) demonstrate the needs assessment and priority ranking tool with one community, working with each gender group separately and then bringing them together to share and discuss their work. Use the “Needs Assessment and Priority Ranking” session plan for the details. (See pages 139-150.)

If more than one community was used for field work, the participants from other communities look on as observers. If time permits, the participants from the demonstration community can be facilitators for doing the needs assessment and priority ranking with the other community(ies). Any extra participants can be observers, or assist those chosen to be the facilitators in some way.

After the demonstration,

1. Discuss how the activity went: for the participants, for the observers.
2. Discuss the positive aspects of the technique.
3. What are the negatives? What are ways to overcome the negatives?
4. When might you use the needs assessment and priority ranking tool? Where does it fit? Why?

If desired, and time permits, spend a few minutes talking about how two groups of needs might be resolved.

Ask: How we can get the community to address both lists? Ideas might include:

1. Find common ground.
2. Get conflict out into open.
3. Evaluate resources.
4. Empower each group to speak for itself; explain its needs.
5. Look for the most immediate needs.
6. Look for ease in implementation (something easier that will build confidence).
7. Is the idea possible? Consider the implications and impact.
8. Seek total involvement. Look for a way to meet some needs on all lists.

Review the lists generated in the needs assessment and priority ranking, and ask:

1. Can we identify a need that is common?
2. How could you begin to address this need?
3. Thinking of the technique used yesterday, what did we learn that impacts this need?
4. Is this the most immediate need? How can we determine that?

Ask trainees to identify where this process might lead the community. What might be the next steps?

#### **IV. EVALUATION OF THE TECHNIQUES AND THE COMMUNITY FIELD WORK** (30-45 minutes)

The evaluation of the technique and information gained can be done as a total group, by field work community groups, or another configuration that fits the groups' needs.

Distribute the "Debriefing Task #3" handout and review it before dividing into groups.

#### **DEBRIEFING TASK # 3:**

##### **Evaluation of the Community Field Work**

Discuss and summarize the following questions related to the community field work:

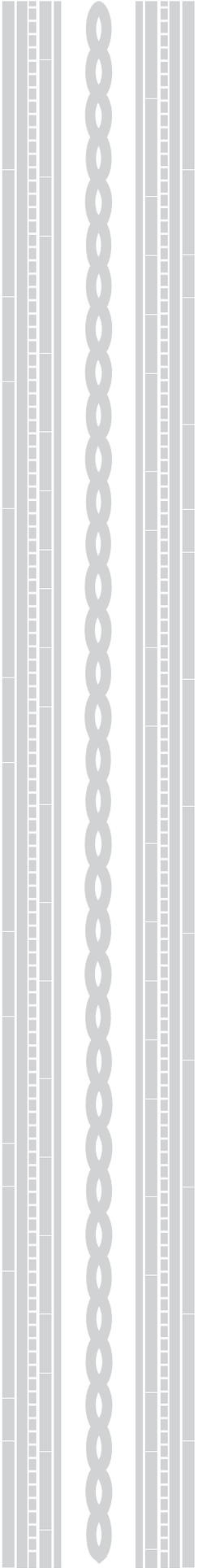
1. How do you feel about the information gained in the community ...
  - a. by the specific techniques?
  - b. by other means?
2. To what extent did the field work provide you the skills you need to ...
  - a. use the PACA techniques?
  - b. facilitate the analysis of information?
3. What more do you need to increase your confidence?
4. If you were to continue working in the community you visited, what are some of the next steps you would take to continue the process you have started?

Divide into groups for 20 minutes to discuss the evaluation questions. Inform them that they will have 10 minutes to present their evaluation to the entire group.

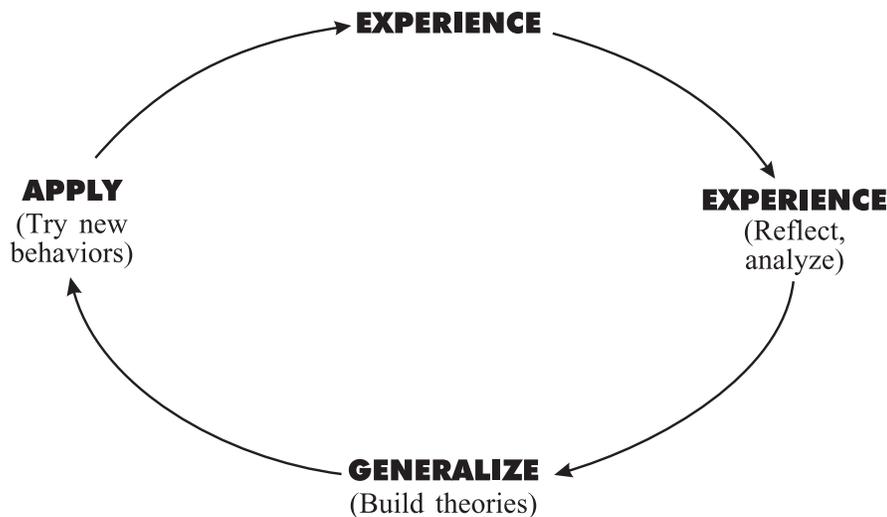
After the reports, discuss any recommendations and come to consensus, as necessary.

At the close of the session, distribute the handout "Needs Assessment and Priority Ranking" (pages 146-149) for their future use, if that demonstration step was done in this session.

**NOTES** 



# THE EXPERIENTIAL LEARNING MODEL



**EXPERIENCE:** something personally encountered, undergone, or lived through.

**PROCESS:** reviewing or recalling what happened, who did what, in what order, with what effect; examining your reactions and observations about what happened; identifying patterns and dynamics, and alternative behaviors that might produce different effects.

**GENERALIZATION:** Given the analysis of what happened, what theories emerge? What new ideas/understandings do you have; what new principles or concepts emerge for you?

**APPLICATION:** How can you use this knowledge in the future to do your work more effectively? What skills do you need to use the new knowledge?

Theory or skill-building can be introduced into the cycle in several places. For example, training may begin with a presentation of theory, followed by a practical experience. Or, training may begin with specific experience which is partially processed. Then theory is introduced to assist in the processing and generalizing.

**DEBRIEFING TASK #1:****DESCRIPTION OF THE COMMUNITY**

You have an hour to discuss and note all the information you obtained in your community. Use the “Topic Outline” handout and the visuals you brought back from your community.

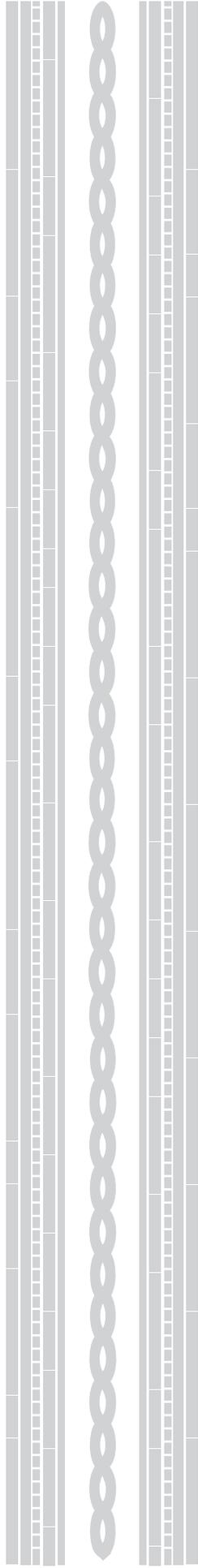
1. Begin with the “Topic Outline” handout. (Ask one person to keep notes for the group.) Discuss each topic and note what you learned. Information may have been learned through the general community meetings, talking one-to-one with people in the community, observations, or come out of the tools you used. Do not guess at information you do not know. Leave blanks where you have insufficient information.
2. What information came out of each activity or technique? (The recorder adds any additional information to the topic outline.) Show each other the flip charts done in each exercise, share the information that came up in the discussions after the techniques by the men and women, look for your own interpretations, including gender differences, and summarize the information.
3. What did the observer(s) notice about each of the following:
  - Dynamics among community members
  - Dynamics among training participants
  - Dynamics between community members and training participants
  - Dynamics between other outsiders, such as extension agents, and the community
4. What other information was gained about the community? By what means?  
Summarize it.
5. Prepare to report to the entire group. You will have 20 minutes to make your report, so plan to present an overall summary of the community, and then highlight what was learned from the tools.

**DEBRIEFING TASK #2:**

## **ANALYSIS OF GENDER DIFFERENCE IN THE COMMUNITY**

Divide yourselves into two groups: one group representing the men of the community, the other group the women. Using the “Gender Information Framework Worksheet” handout:

1. Discuss and list by gender the data gathered in each category of the exploratory factors.
2. Discuss what the community said about the gender differences, constraints, and opportunities.
3. Summarize your analysis of the gender differences, constraints, and opportunities.
4. Be prepared to represent your gender group’s realities in the next exercise.

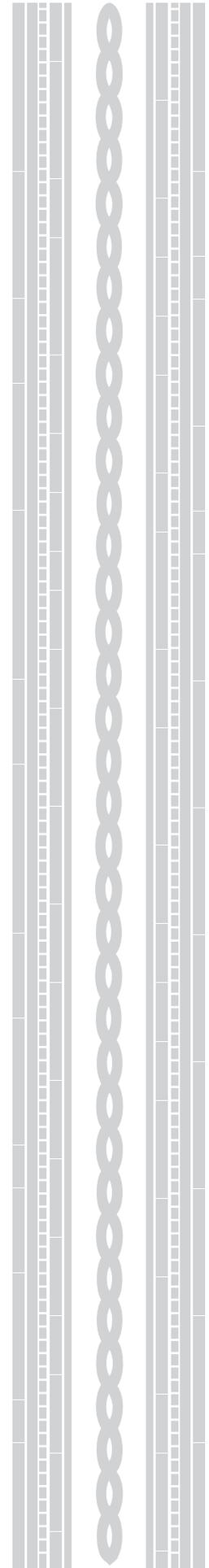


# GENDER INFORMATION FRAMEWORK WORKSHEET

## I. EXPLORATORY FACTORS

A. EXPLORATORY FACTORS	WOMEN and GIRLS	MEN and BOYS
<p><b>1. TASK IMPLEMENTATION</b></p> <p>(Who does what tasks? Include paid work, and all unpaid work, for the family or the community.)</p>		

	<b>WOMEN and GIRLS</b>	<b>MEN and BOYS</b>
<p><b>2. INCOME</b> (Who earns what, in cash or kind?)</p>		
<p><b>3. EXPENDITURES</b> (What are the family expenses? Who contributes what toward each household expense?)</p>		



**4. RESOURCES**

(Who has access to and/or controls key resources? Include **physical, financial, informational, and socio-organizational** resources.)

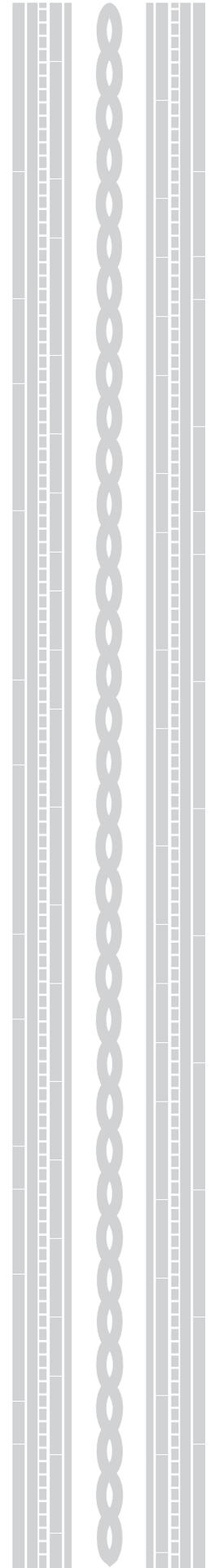
**5. TIME/SEASONALITY**

(What happens at various times during the year, in terms of work income and expenses, illnesses, etc?)

**WOMEN and GIRLS**

**MEN and BOYS**

	<b>WOMEN and GIRLS</b>	<b>MEN and BOYS</b>
<p><b>6. DECISION-MAKING</b></p> <p>(Who decides about behaviors or investments required?)</p>		
<p><b>7. OTHER</b></p> <p>(Any other gender-related factors you feel might be basic to any community action or project?)</p>		



**B. ADDITIONAL DATA NEEDED**

(These are “missing data” that are not known or available for completing some of the factors above but that are likely to be relevant to designing and implementing a project.)

**WOMEN and  
GIRLS**

**MEN and  
BOYS**



**B. ASSUMPTIONS**

(Guesses you had to make in order to complete an analysis pending finding out the needed information.)

**WOMEN and GIRLS**

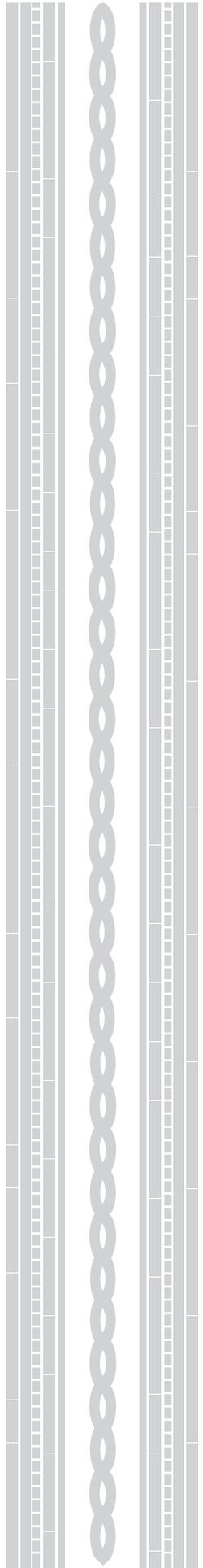
**MEN and BOYS**

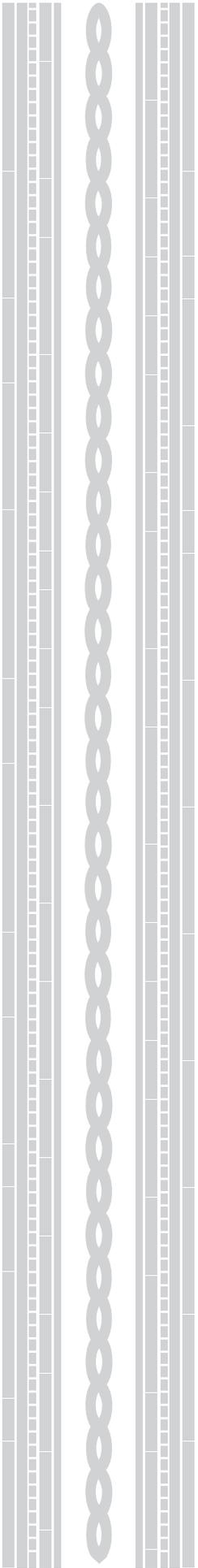
Based on Gender Information Framework developed by USAID's GENESYS Project

**DEBRIEFING TASK #3****EVALUATION OF THE  
COMMUNITY FIELD WORK**

Discuss and summarize the following questions related to the community field work:

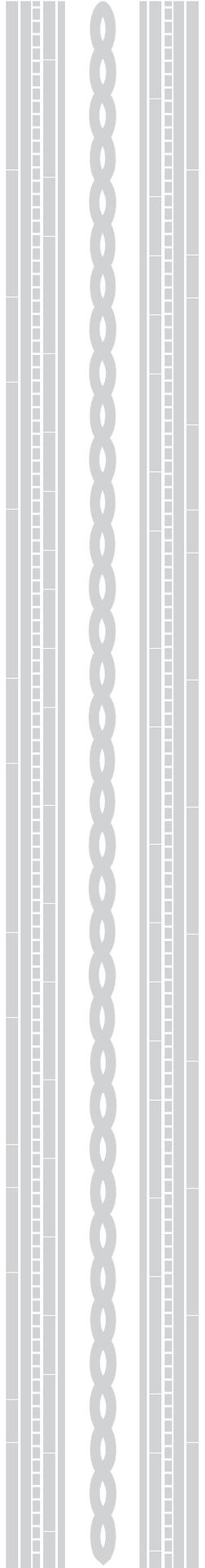
1. How do you feel about the information gained in the community...
  - a. by the specific techniques?
  - b. by other means?
  
2. To what extent did the field work provide the skills you need to...
  - a. use the PACA techniques?
  - b. facilitate the analysis of the information?
  
3. What more do you need to increase your confidence?
  
4. If you were to continue working in the community you visited, what are some of the next steps you would take to continue the process you have started?

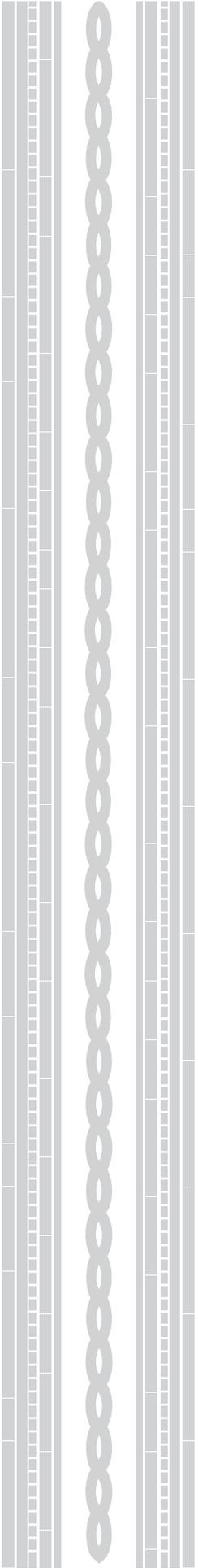




## **SECTION 6: MOVING INTO PROJECTS**

This section contains several different application and action planning sessions. Each session provides ideas on how the concepts and skills might be applied.





# GENDER AND DEVELOPMENT

Development is an investment in the future. The links between people and development efforts include food security and nutrition, energy, employment, income, health, education, and sustainable agriculture and natural resources. These links are especially vital to the rural and urban poor. It is increasingly recognized that the socioeconomic needs of these women and men must be a priority in any sustainable strategy to resolve development problems.

Increasingly, development policies have begun to move away from a strictly production and industrial sector focus towards a development approach which acknowledges the links between resources and people. Current efforts are designed to address the problems of urban and rural poverty, promoting local people as the *agents* as well as beneficiaries of development activities.

Planning for *people-centered* development requires more precise information about who the people are. They are not a homogeneous group. The people are comprised of women and men. The “poor” are poor women and poor men. The “children” are girls and boys. Everywhere, within every socio-economic group, the lives of women and men are structured in fundamentally different ways. A gender-based division of labor is universal; but it differs by culture, place, ethnic group, and class. Therefore, information is not precise enough for development project planning if it is not disaggregated by gender.

Increasingly, gender-disaggregated information is used in international aid development because of its importance, and because many development professionals now have access to the necessary information and training in gender analysis.

## THE IMPLICATIONS OF CONSIDERING GENDER IN DEVELOPMENT

Gender-disaggregated information reveals what women and men know, what they do, and what they need. Without such information development efforts may not be appropriately designed, risking failure and negative impacts. Whether women, men, or both should be participants in specific development activities is a highly contextual question. The answer depends on the roles and priorities of the women and men within specific locations. Using gender analysis, development planners gain gender-disaggregated information on factors affecting development which guides them to more sustainable and effective development.

Gender-disaggregated information is different from information collected by other methods for development planning because it uses the individual person as its unit of analysis. Therefore, it is more precise than other methods employing more aggregate analytic units. Gender analysis is a methodology for presenting a comprehensive picture of women’s and men’s contributions to national development.

## WID AND GAD: TRENDS IN PRACTICE

Traditional data collection methods often omit women's multiple roles and contributions to development. The women in development (WID) approach to development planning highlights the importance of women's contributions, by focusing primarily on women.

Other development programs focus on the household or family as the **unit** of analysis, but they do not look at the individual rights, roles, and responsibilities of the individuals within the family. These approaches assume that each member of the family shares equally all the benefits accruing to the family as a whole. This assumption has proved to be incorrect.

Gender and development (GAD) differs from these approaches by adding to WID to include **both women and men**. Development policies and plans are frequently based on the assumption that men alone support families, but in reality it is women and men together who do so; in the growing number of female-headed households it is women alone who do so.

Experience and research supports the assertion that the fundamental elements of effective development management—sustainability, productivity, and equitability—are strengthened through explicit attention to gender. A better understanding of gender as a variable in rural and urban livelihood systems can be gained by using a variety of analytical tools that fall loosely under the rubric of gender analysis.

## THE PROBLEM: CHANGING GENDER ROLES AND TRANSFORMING ECONOMIES

Around the world, women's and men's responsibilities differ according to the specific situations in which they live. These circumstances are shaped by:

- environment
- economic conditions
- class
- culture
- national history
- household circumstances
- legal structures
- religion
- occupation

In much of the developing world resource productivity is declining. In order to survive in a cash economy under conditions of a declining resource base, men and women, even in the remotest parts of the world, increasingly seek local wage labor in both rural and urban areas. They are also planting and selling more cash crops, often at the expense of subsistence crops.

Global conditions cause the following phenomena in rural communities:

- extensive out-migration
- more time-intensive work for those left behind
- growing numbers of women-managed households
- new responsibilities for women without increased access to resources
- new norms and expectations as families become fragmented
- changes in gender and generational perspectives
- shifts from exchange work groups to wage labor

## LINKAGES: GENDER AND POVERTY

Despite the accumulating forces for greater participation, large numbers of people continue to be excluded from the benefits of development: the poorest segments of society, people in rural areas, many religious and ethnic minorities and, in almost every country, women. Women are the world's largest excluded group. Even though they make up half the adult population, and often contribute much more than their share to society, inside and outside the home, they are frequently excluded from positions of power. Many developing countries also exclude women from both political participation and productive work—whether by tradition, discriminatory laws, or withheld education. Indeed, for decades, life has changed very little for 500 million rural women in the developing world.

Powerful vested interests erect numerous obstacles to block off the routes to women's political and economic power. These obstacles include:

### LEGAL SYSTEMS

Laws are often arbitrary and capricious and favor those with political influence or economic clout. In too many countries, legislation fails to measure up to ideals of transparency, accountability, fairness, and equality before the law. Some countries exclude the participation of women, for example, or of religious or ethnic minorities or deny certain rights to workers.

### BUREAUCRATIC CONSTRAINTS

Many developing countries have shackled their people with innumerable regulations and controls, demanding all sorts of permits and permissions for even the most modest business initiative. Fortunately, many governments have started to dismantle the most stifling of these controls and are opening new avenues for entrepreneurial activity.

### SOCIAL NORMS

Even when laws change, many old values and prejudices persist, and are often deeply embedded in everyday language and behavior. Laws may promote equality, but it is usually left to the discriminated group to struggle against prejudice. Thus, working women, even when they prove themselves better, are frequently not given equal treatment.

### MALDISTRIBUTION OF ASSETS

In developing countries, one of the most significant assets is land. A high proportion of the people struggle to make a living in agriculture, but their efforts are often thwarted by the dominance of feudal elites who exert an overwhelming control over land. In these countries, there can never be true participation in the rural areas without far-reaching land reforms— as well as the extension services, trading, and credit for smaller farmers (particularly women) that can help them become productive and self-reliant.

Whether in urban or rural areas, vested interests that currently enjoy economic, financial, political, or social power are usually determined to defend their position—either individually or through close-knit associations, well-financed lobbies, and even violence.

Changing the power equation requires the organization of a countervailing force. People's organizations—be they farmers' cooperatives, residents' associations, consumer groups, or political parties—offer some of the most important sources of countervailing power. And they often exercise it most effectively through the sharing of information and ideas—it is ideas, not vested interests, that rule the world for good or evil.

## TOOLS FOR GENDER ANALYSIS

Tools for gender analysis are essential building blocks for projects and programs aimed at improving lives in sustainable ways. They reveal how gender differences define people's rights, responsibilities, and opportunities in society. Recognizing the ways that development affects men and women differently allows planners to incorporate this information in the successful implementation, monitoring, and evaluation of development projects and programs.

These tools offer ways of gathering data and analyzing gender as a variable in household and community organization for development. The methods give new insights into the local situation and permit a more comprehensive understanding of the community's situation, and facilitate the creation of a more effective equitable development program.

Through its GAD and participatory analysis for community action (PACA) training materials, the Peace Corps has introduced several gender analysis tools. For analyzing the macro-level, the Contextual Analysis format provides levels of considerations of both opportunities and constraints to women and men. The Gender Information Framework is a guide for culturally determined elements within the household that need analysis prior to project planning. The participatory analysis for community action materials provide a philosophy and methodologies for including the participants in the gender analysis and subsequent community action, with the development worker as partner.

Gender affects development and shapes opportunities for building local-level capacities across cultural, political, and ecological settings. Project experience shows that information about gender is vital to effective and sustainable outcomes. Interest in gender analysis has been spurred largely by those concerned about women's roles and their desire to transform gender relations across many dimensions of development. In reality, all people interested in effective and equitable development management and in long-term capacity-building for local communities must address issues of gender as it pertains to the development process.

For example, knowledge of differences in men's and women's savings strategies can indicate new ways to mobilize savings and thus establish stronger credit programs. Awareness of how men and women receive information (e.g., through newspapers, radio, at the health clinic) can assist in designing effective information dissemination systems. Knowing gender differences in mobility between and within towns can assist in designing primary and secondary school programs that increase both male and female enrollment. Knowledge of intra-household responsibility for seed selection for next year's planting provides an opportunity for agricultural researchers to gain greater understanding of the drought-resistant, early maturing, and disease-resistant characteristics of a particular plant variety.

## APPLICATION OF GENDER ANALYSIS DATA

Development programmers can apply what they have learned at many project stages. As planners and implementers engage in important planning and implementation activities, the following guidance on project features will be useful.

### PROJECT FEATURES TO CONSIDER

- Choice of promotion strategy
- Choice of technical packages
- Timing and duration of activities
- Delivery systems
- Location of project activities or services
- Eligibility criteria
- Nature and distribution of benefits

## **CHOICE OF PROMOTION STRATEGY**

Promotion strategies need to take into account communication networks and language differences. Because of limited mobility and less education, women are less likely to speak a European or national language that must be learned in school. Women are therefore less able to take advantage of programs, education, and services. Language requirements need to be considered in outreach and training programs.

Women usually have different communication networks. While men may receive information from newspapers, radios, or at men-only village meetings, women may give and receive information at the clinic, the well, or alternate sources. To ensure that information about resources or new technology is adequately disseminated, it is important to identify gender-specific communication networks.

## **CHOICE OF TECHNICAL PACKAGES**

Different technical approaches to development problems are frequently necessary to appropriately address the roles and responsibilities of men and women. Planners should ask: are technical packages applicable to all households (both male- and female-headed), or only those with certain types of resources? Are technical packages targeted for the person responsible for the activity, and do they match that person's resources? Are credit procedures appropriate for both men and women? Do education and training curricula address productivity issues related to both men's and women's activities?

## **TIMING AND DURATION OF ACTIVITIES**

Women's home constraints differ from those of men because of their dual family and economic roles and responsibilities, which are often intertwined. Project activities, such as trading or voluntary labor contributions, need to take into account women's daily and seasonal time constraints. Training held during morning food preparation hours, for example, essentially precludes the participation of many women.

## **OUTREACH OF EXISTING DELIVERY SYSTEMS**

Often women operate outside existing delivery systems. They frequently have less access to outreach or extension agents. There are a variety of explanations for this situation, ranging from cultural norms constraining contact between nonfamily males (extension agents), to lack of information appropriate to their needs provided by the delivery system.

## **LOCATION OF PROJECT ACTIVITIES OR SERVICES**

Cultural norms often restrict the mobility of women. They are less likely to be able to travel to distant training sites, clinics, village meetings to discuss where water wells and schools should be placed, banks or financial services, and other meetings and services development projects often provide.

## **ELIGIBILITY CRITERIA**

Eligibility criteria often preclude women's participation. English language requirements, for example, can reduce the eligible pool of women candidates for training, since fewer women have had access to educational institutions where English is taught. Age limits on long-term training programs may inadvertently restrict women's participation, since often they must remain at home with their children. Credit programs that require land as collateral essentially eliminate women's participation in many cultures. In some instances the criteria are more stringent than necessary and should be revised. For example, alternative forms of collateral could be devised. Other options could provide the training and assistance that would enable women to meet the requirements.

## NATURE AND DISTRIBUTION OF BENEFITS

Direct access to benefits affects incentives to participate. Where women are expected to work or participate but receive few benefits, which has occurred in agriculture and natural resource management projects, they are less likely to participate. Sometimes development interventions put additional burdens on women's daily tasks because those tasks are not identified in advance. Furthermore, unexpected tasks may limit other important activities and may not provide income that directly benefits the women and children.

## CONCLUSION

Saying that the "people" or "community" will participate in a development project obscures the different activities, resources, and constraints of women and men. Gender roles are critical to any effort. These roles vary greatly by culture, and may change over time. Therefore, they must be examined in each specific context to avoid faulty generalizations or assumptions. "Standard" gender-sensitive project design is a contradiction. Every development context is unique and requires specific analysis to yield appropriate and adequate responses.

Excerpted from materials produced by the United States Agency for International Development's GENESYS Project; *Tools of Gender Analysis: A Guide to Field Methods for Bringing Gender into Sustainable Resource Management* by Thomas-Slayter, Esser, and Shields, Clark University's International Development Program; and *Human Development Report* 1993, Oxford University Press.

# ROLE OF GENDER ANALYSIS IN PROJECTS

Planning for people-centered development requires more precise information about who the people are. They are not a homogeneous group. The “people” are comprised of women and men. The “poor” are poor women and poor men. The “children” are girls and boys. Everywhere, and within every socioeconomic group, the lives of women and men are structured in fundamentally different ways. A gender-based division of labor is universal; but it differs by culture, place, ethnic group, and class. Therefore, information is not precise enough for development project planning if it is not disaggregated by gender.

Tools for gender analysis are essential building blocks for projects and programs aimed at improving lives in sustainable ways. They reveal how gender differences define people’s rights, responsibilities, and opportunities in society. Recognizing the ways that development affects men and women differently allows planners to incorporate this information in the successful implementation, monitoring and evaluation of development projects and programs.

Development programmers need to apply what they have learned from gender analysis in many project features. There may be different constraints and opportunities for men and women that need to be addressed which determine project features, such as

- Choice of promotion strategy
- Choice of technical packages
- Timing and duration of activities
- Delivery systems
- Location of project activities or services
- Eligibility criteria
- Nature and distribution of benefits

# LIVELIHOOD EXERCISE

## TIME



1 hour

## GOAL AND OBJECTIVES

### GOAL

To apply the concept of the household as a system to representative families in the participants' sphere of work, rural or urban.

### OBJECTIVES

1. To analyze how representative families assure their short-term and long-term survival in a small group.
2. To show where the particular interventions of Peace Corps projects have affected (or may affect) the household in its different spheres of action.

## SESSION OUTLINE

- I. Introduction (10 minutes)
- II. Livelihood systems (50 minutes)
- III. Transition to PACA (1 minute)

## TRAINER PREPARATION



This session must be preceded by the session on households as a system, "Introduction to a Systems Approach" (pages 20-40). In order to ensure your own understanding and have an example ready should participants ask for one, prepare an example of a family livelihood system. It can be based on one's own household or a representative family.

## MATERIALS



For each small group:

- Blank flip chart sheets
- Marking pens, several colors
- Optional:
  - Colored paper
  - Scissors
  - Tape or glue sticks

## HANDOUT

- The Household as a System

## FLIP CHARTS

- Livelihood System
- Group Task (1)
- Group Task (2)

## PROCEDURE

### I. INTRODUCTION (10 minutes)

Explain that this session will give participants a chance to apply the information about the household as a system to their own working situation. Distribute the handout “The Household as a System” for reference.

### II. LIVELIHOOD SYSTEMS (50 minutes)

- A. Using the “Livelihood System” flip chart, define a livelihood system as the set of activities that households employ on a regular basis to assure their short-term and long-term survival. Livelihood systems mobilize resources and allocate resources among different alternative activities (e.g., agricultural and non-agricultural activities), using different members of the household (men, women, children).

**LIVELIHOOD SYSTEM**

- activities family employ on regular basis
- short-term and long-term survival
- mobilize resources
- allocate resources
- different roles of family members

### B. Group exercise

Assign participants to small groups based on where they live or with whom they work, such as by rural or urban communities, agriculture or business families. Explain the group task, using the “Group Task (1)” flip chart.

**GROUP TASK (1)**

Design a representative livelihood system for a family in your region, area.

Must show:

1. Distinction in rights, roles, and responsibilities, including major tasks, of men, women, and children.
2. Resources
3. Expenditures

Note that they will have 30 minutes to discuss and draw a representative system. The system can be done graphically or with words, or both. Then they will receive one more task.

C. After 30 minutes, add the following task to the flip chart:

**GROUP TASK (2)**

Show where the interventions of your project affect (or will affect) the household in its different spheres of action.

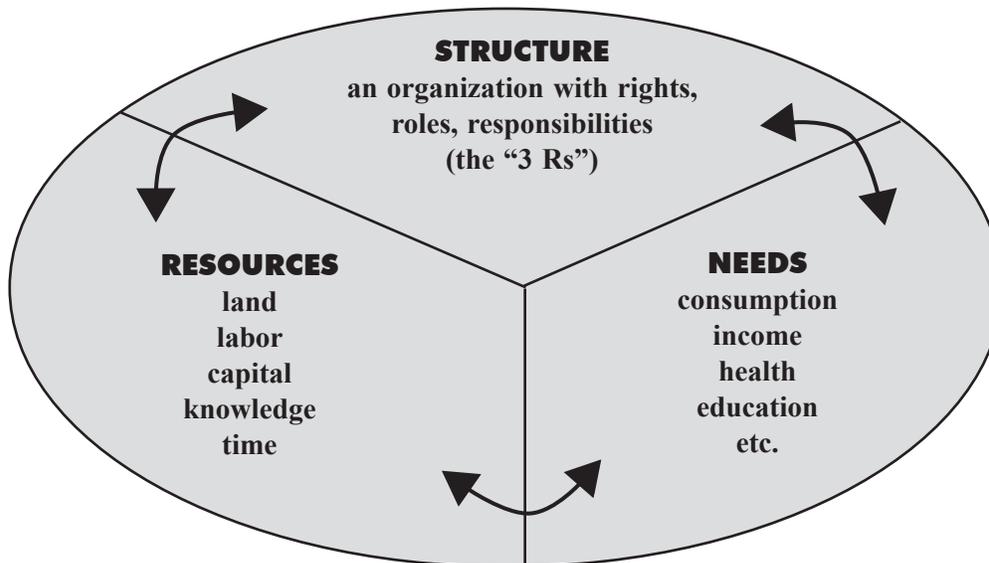
D. Report out: Have each group describe its livelihood system and the effects of its project(s). Encourage them to detail information they may not know.

**III. TRANSITION TO PACA** (1 minute)

Indicate that those who know their livelihood systems the best are the community members themselves. In the next sessions, we will be learning about gender-sensitive participatory processes where family members themselves diagnose their realities and look for their own solutions.

## THE HOUSEHOLD AS A SYSTEM

The household has three components. All of the components are inter-related.



### HOUSEHOLD STRUCTURES ARE CULTURALLY DETERMINED:

1. Rights: belonging, ownership
2. Responsibilities: child care, production, education, health, interaction with outsiders, savings and investment
3. Roles for each family member: head of household, decision-maker, caregiver, etc.

These components are not independent of each other but are integrated in a functional sense. A change in one component can have an impact on an activity somewhere else in the system.

Issues for discussions about development:

1. It is difficult to change culturally determined roles.
2. Distribution of benefits cannot easily be changed from the outside.
3. Change at any point in the system will cause changes elsewhere, planned or unplanned.

# EXPLORING A RANGE OF ACTIVITIES TO MEET AN IDENTIFIED NEED

## TIME



3 1/2 hours

## GOAL AND OBJECTIVES

### GOAL

To explore how an identified need might be addressed by activities for various segments of the population.

### OBJECTIVES

1. To explore who the target group includes, such as by age or stages of life.
2. To identify possible activities that would lead to addressing the identified need for each subgroup identified.
3. To apply these steps to needs identified by workshop participants by working in small groups.

## SESSION OUTLINE

- I. Introduction (5 minutes)
- II. Exploring how to address a need (60 minutes)
- III. Application by small groups (60 minutes)
- IV. Gallery (60 minutes)
- V. Summary (20 minutes)

## TRAINER PREPARATION



1. This session followed a previous needs assessment and priority ranking session in which needs of women from various regions of the country were identified. As the participants were all women, the examples in the session are based on women's needs. However, the same design can be used for other groups. Based on who the participants in the workshop will be, prepare examples of how subgroups within the population might be identified: age, stages of life, other criteria? Have some examples of how an identified need might be addressed differently for some of them.
2. Prepare flip charts.
3. Gather materials.

## MATERIALS



- Blank flip chart paper
- 6-10 marking pens
- Tape
- Sticky pads or small rectangles of paper and tape

## FLIP CHARTS

- Small Group Task 1
- Small Group Task 2

## PROCEDURE



### I. INTRODUCTION (5 minutes)

- Remind the group of the prior session in which it identified its top five priority needs during the needs identification and prioritizing exercise.
- Then explain: In this session we are going to think about some possible activities which might address those needs.

### II. EXPLORING HOW TO ADDRESS A NEED (1 hour)

#### A. State,

As all our needs addressed girls and women, let's consider how we might group them in order to address specifically the needs of different groups of girls and women.

- What might be some subgroups of women we might want to look at? (By age group, by education level, by ethnic group).
- Let's work on how we might group women according to the stages of a woman's life.
  - U.S. public health professionals use these categories: girls, adolescents, childbearing, and post-childbearing. What are the stages of a woman's life here? How would you define them?
  - Discuss the phases of life one-by-one, asking
    - What distinguishes it from the stage before?
    - How do women know which category they fit into?
    - Do unmarried or childless women know where they are classified?
  - For example, Zambian classifications were girls, young mothers, mothers, and grandmothers. Age was considered, but that wasn't useful because it was too confusing. Roles became the way they saw it. Unmarried and childless women are called "aunties" and they would know into what category they would fit even if they were not married or had no children.

- d. This discussion can be quite rich and revealing about the way society looks at women at different times in their lives. It is an important discussion so that an outsider's idea isn't imposed on the group and so that groupings are meaningful to participants.
- B. Preselect a priority need from one of the groups in the prior needs ranking session. Be sure that it is one that you, as a trainer, know you can provide at least two example activities for each phase, or subgroup, you created above.
1. State,

Let's take one priority need from one of the groups. We'll write the need across the top of a flip chart and below write the phases we determined. For example,

<b>LITERACY</b>			
<b>Girls</b>	<b>Young Mothers</b>	<b>Mothers</b>	<b>Grandmothers</b>

2. Then begin to get their ideas of possible activities with **girls** which could help address the overall priority need of literacy.

When there are pauses, try to build on previous ideas. For example, 1) "organize a girls' club" contributes to their self-esteem and could provide time to study or get school help. How do we help parents understand the value of the club or, by extension, education for girls? Or, 2) how can "work with grandmothers to teach their granddaughters the importance of educating their daughters" be strengthened by working with grandfathers to teach their sons and grandsons the importance of educating their daughters?

Remind participants that we are the ones who educate our sons and daughters about the importance of education for girls and women.

A third example would be to address the obstacle of the registration fee for literacy classes by helping women develop an income-generating project which allows them to earn the money for the fee.

3. Continue to work on subsequent phases and try to come up with at least three to four activities for each phase.

Validate participants' growing awareness that some activities may be appropriate for multiple phases of a woman's life.

Stress that there are preparatory activities which may not make individual women literate immediately, but may be necessary foundations for eventual literacy gains. For example, the girls' clubs may not teach literacy, but could work towards the self-esteem issues which are important in order for a girl to hear the importance of literacy for her when the topic is introduced. Participants may have a tendency to focus only on activities which go directly to the need such as "teach literacy and numeracy classes to grandmothers." It is important to keep asking and prompting for activities which also enable and empower women to take action later.

### III. APPLICATION BY SMALL GROUPS (1 hour)

- A. Explain to participants that they will have an opportunity to apply this technique to one of the needs their group identified. Reveal the small group tasks on a flip chart:

#### SMALL GROUP TASK #1

1. Work in same groups as yesterday.
2. Select one of your priority needs; choose one that seems relatively easy to use for this practice.
3. Prepare a flip chart with activities for each of the phases.

If appropriate to the training location, remind them that this is our thinking here in the capital city. These same activities can be carried out with the group of women you will be working with to find out their own ideas.

- B. Have the participants divide into groups and start working. Check with each to see if they have questions, need clarifications, or help in thinking longer range.

Some groups may take longer than others. If it fits with the schedule, slower groups can take a short break or bring refreshments back to their work area.

Post the groups' flip charts in different corners of the room with chairs around the flip charts.

### IV. GALLERY (1 hour)

- A. Explain that now they are going have an opportunity to read the ideas of the different groups. This will allow them to learn from each other and help each other at the same time.

Reveal flip chart and explain the gallery:

### **SMALL GROUP TASK #2**

1. Move to another group's chart.
2. Read it and ask questions of the member who has remained.
3. Discuss among yourselves other ideas you have for this topic.
4. Write your suggestions on small slips of paper and attach them to the appropriate place on the chart.

1. Each group will have some small slips of paper and tape. After you have read and discussed someone else's flip chart, you will have a chance to add some ideas by writing them on the slips of paper and putting them on the charts in the appropriate place.
2. We will move several times so you can see every other group's work. One group member needs to remain behind at his or her group's flip chart to explain to the new group what the thinking was behind certain suggestions. Once the questions have been answered, he or she should rejoin the original group.
3. Participants then visit the other groups' flip charts. Give them about 20 minutes at each chart.
4. Once each has visited the others, each group returns to its own original flip chart to review and discuss the suggestions the other groups have made.
5. Provide an opportunity for participants to ask for clarification of suggestions made at their chart.

### **V. SUMMARY** (20 minutes)

Wrap-up and process what participants thought about the activity, using questions, such as:

1. What do you think about the ideas you were able to generate to meet the needs identified?
2. Can you imagine doing this with a group of girls or women in your home community? Who might they be?
3. Who can remind us of the steps we took to get all these ideas generated? Where did we start (yesterday, this morning)?
4. If your groups' chart is what a group in your town came up with, what are some steps it might take next?

*Note: This session can be adapted easily to fit other community groups or stakeholders.*

# PARTICIPATORY ANALYSIS OF COMMUNITY ACTIVITIES/PROJECTS

## RATIONALE

There are many ways a development worker might assist a community to work with the data they have gained from analysis tools. This session makes the link from **participatory** information gathering and **information** analysis, to **participatory** identification and analysis of **projects** for community action. It is based on working with the many needs that may have been identified in community field work. A gender analysis matrix provides a framework for this analysis.

## TIME



1 hour

## GOAL AND OBJECTIVES

### GOAL

To move from data gathering and analysis to activity or project proposal analysis.

### OBJECTIVES

1. To consider ways to bring together several different sets of needs (represented by different groups of the population) and determine actions that will address several needs.
2. To work with the gender analysis matrix as a participatory tool for looking at the impact of potential actions/projects.

## SESSION OUTLINE

- I. Introduction (3 minutes)
- II. Meeting different needs (15 minutes)
- III. The Gender Analysis Matrix (GAM) (40 minutes)
- IV. Summary and conclusion (2 minutes)

## TRAINER PREPARATION



1. Prepare an example to use with the gender analysis matrix, preferably one that is plausible for the community where you did community field work. Use your example only if necessary; preferably use one that develops in the course of this session.

2. Read the definitions of the elements in the gender analysis matrix. **Practice** putting entries into the categories and assigning possible negative and positive values.

## MATERIALS



- Blank flip charts
- Markers
- Masking tape
- Charted lists of needs assessment priorities from previous activities, if possible

## HANDOUTS

- Gender Analysis Matrix
- Definitions for the Gender Analysis Matrix

## FLIP CHART

- Large flip chart of blank gender analysis matrix

## PROCEDURE



### I. INTRODUCTION (3 minutes)

- A. Ask: What are participatory methods we have used to learn and discuss realities with community members?
  - Observations and questions
  - Community mapping
  - Daily activities
  - Seasonal calendars
  - Needs assessment and priority ranking
- B. From whom have we or can we learn different perspectives?
  - Men, women
  - Boys, girls
  - Special interest groups
  - Age groups
  - Ethnic groups
  - Etc.
- C. How can we help the community use this information to improve itself? That is the focus of this session: using participatory analysis to consider the effects of potential community activities or projects.

## II. MEETING DIFFERENT NEEDS (15 minutes)

*Trainer's note: If this activity was done during the "Debrief of Community Field Work" session, just quickly remind participants of that, perhaps by reviewing their flip charted work. It is critical to make clear that training participants are practicing what they would do with the community; this is not an analysis they would do alone or with other development workers.*

- A. Display lists of needs made by different groups in the community. (If necessary, make up two or more lists.)
  1. Ask: If we were working with a community group and these were its lists, how could we help it address the issues on both lists? Ideas might include:
    - a. Find common ground
    - b. Get conflict out into open
    - c. Evaluate resources
    - d. Empower each group to speak for itself; explain its needs
    - e. Look for most immediate needs
    - f. Look for ease in implementation (something easier that will build confidence)
    - g. Is the idea possible? Is it desirable? (consider the implications and impact)
    - h. Total involvement: look for a way to meet some needs on all lists
  2. Look back at the needs lists. Here are some possible actions or questions:
    - a. Identify something that is common.
    - b. How could the community begin to address this?
    - c. Looking back at the experiences we had in the community and the tools we used, what did we learn that impacts on this need?
    - d. Is this the most immediate need? Is this a need for which there is a possibility for action by the community? How can we determine that?
- B. Let's look at the matrix that will help us work with a community on these issues.

## III. THE GENDER ANALYSIS MATRIX (40 minutes)

*Trainer's note: Prepare an example of your own to use in case there is not one out of the community work. Ideally, you can create one from the information from the community, or something plausible for that community.*

- A. One way to analyze the impacts of a potential activity or project is the gender analysis matrix. We will work with it in the same way you might work with your community to analyze ideas for projects that they suggest.
  1. Reveal the gender analysis matrix flip chart. Distribute the "Gender Analysis Matrix" and "Definitions for the Gender Analysis Matrix" handouts. Go through the definitions together.

<b>GENDER ANALYSIS MATRIX</b>				
	<b>Labor</b>	<b>Time</b>	<b>Resources</b>	<b>Culture</b>
<b>Women</b>				
<b>Men</b>				
<b>Household</b>				
<b>Community</b>				
<b>Other:</b>				

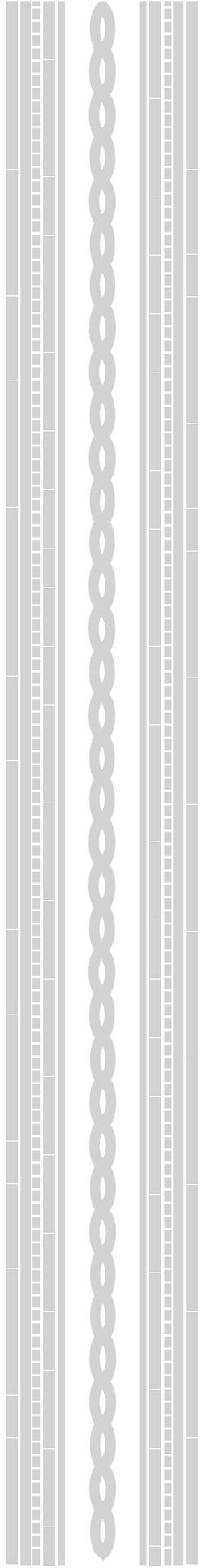
2. If possible, take an example from the combined needs assessment activity above. If not, introduce your own example. Work through the matrix.
3. First list entries in each section, both positive and negative. For example, the following items might be placed on the matrix if analyzing a project for bringing piped water to all the homes in one village. Explain the filled boxes. Have participants suggest some others, though it is not necessary to fill all the boxes to work through the example.

<b>GENDER ANALYSIS MATRIX</b>				
	<b>Labor</b>	<b>Time</b>	<b>Resources</b>	<b>Culture</b>
<b>Women</b>	No longer need to transport water	Save time Option for leisure		
<b>Men</b>		↔ Training, building & maintenance take more time & work		Uneasy about women having free time
<b>Household</b>			Better health More water	
<b>Community</b>	Trained Comm. Water Committee for system maintenance			
<b>Other:</b>	Children no longer have to transport water			

4. Then return to each item and determine if it will have a negative or positive effect, or potentially both, or unknown. If positive (or opportunity), place a “+” before it; if negative (or constraint), place a “-” before it. Leave blank if unknown. This discussion could be very lively as some effects may be viewed as positive by some people and negative by others. The important point is the process of discussing the effects, and different people’s perceptions of them. Add the symbols as the participants discuss your example.

<b>GENDER ANALYSIS MATRIX</b>				
	<b>Labor</b>	<b>Time</b>	<b>Resources</b>	<b>Culture</b>
<b>Women</b>	+ No longer need to transport water	+ Save time Option for leisure		
<b>Men</b>	Training, building & maintenance take more time & work ↔			- Uneasy about women having free time
<b>Household</b>			+ Better health + More water	
<b>Community</b>	+ Trained Commun. Water Committee for system maintenance			
<b>Other:</b>	+ Children no longer have to transport water			

- B. When and how would you use something like the gender analysis matrix?
  1. *With the community* work through all the considerations on the matrix before starting a project. The visual idea of a matrix may be unfamiliar and confusing to some community members. The form is not the important part: it is discussing the content of the matrix that is critical. Drawings could replace the words. Items could be placed on the ground instead of using paper and pen or blackboard and chalk.
  2. Once a project is in process, the matrix can be used *with the community* to monitor how the project is progressing, giving some insights into unexpected impacts while there is still time to adjust the project.



3. It would be useful to review, *with the community*, some past projects, especially unsuccessful ones, in order to find out what went wrong. This would be a way to learn and share the history within the community, and, it is hoped, not fall into the same traps.
4. The matrix could be used to analyze, *with the community*, an inherited project that is faltering.

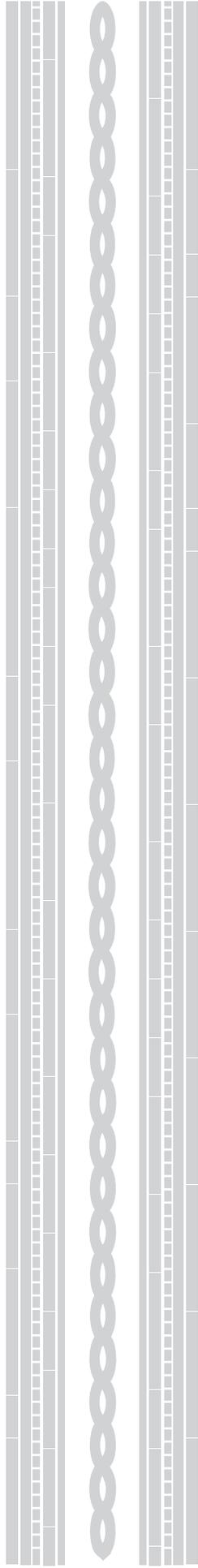
C. Take a project one member of your group is working on. Analyze it with the matrix.

#### **IV. SUMMARY AND CONCLUSION** (2 minutes)

- A. Emphasize the importance of community analysis of the potential effects as the first steps in developing a project. Who, what, where, how are all influenced by the factors identified and discussed in the gender analysis matrix.
- B. There are other Peace Corps publications that will assist you in moving further into project planning with the community. One title follows:
  1. *Promoting Powerful People* [ICE No. T0104]

Gender Analysis Matrix is taken from *Another Point of View: A Manual On Gender Analysis Training for Grassroots Workers* by A. Rani Parker.

<b>GENDER ANALYSIS MATRIX</b>				
	<b>Labor</b>	<b>Time</b>	<b>Resources</b>	<b>Culture</b>
<b>Women</b>				
<b>Men</b>				
<b>Household</b>				
<b>Community</b>				
<b>Other:</b>				



## DEFINITIONS FOR THE GENDER ANALYSIS MATRIX

The gender analysis matrix is a simple and systematic way to study the different gender effects of projects on men and women. The matrix has several levels of analysis and four categories of analysis.

Levels of analysis include women, men, household (including children and other family members living together), the community, and other (which may be described as needed).

**WOMEN** This refers to women of all ages who are in the target group (if the target group includes women), or to all women in the community.

**MEN** This refers to men of all ages who are in the target group (if the target group includes men), or to all men in the community.

**HOUSEHOLD** This refers to all women, men, and children residing together, even if they are not part of one nuclear family. Although the types of household may vary even within the same community, people always know what constitutes their “household” or “family.” That is the definition or unit of analysis that should be used for this level in the matrix.

**COMMUNITY** This refers to everyone within the project area as a whole. The purpose of this level is to extend the analysis beyond the family to society at large. However, communities are complex and usually comprise a number of different groups of people with different interests. So, if a clearly defined “community” is not meaningful in the context of the project, this level of analysis may be eliminated.

The four categories of analysis are the potential changes in labor, time, resources, and sociocultural factors for each level of analysis.

**LABOR** This refers to changes in tasks (fetching water from the river), level of skill required (skilled versus unskilled, formal education, training), and labor capacity (how many people and how much they can do; do people need to be hired or can members of the household do it?).

**TIME** This refers to changes in the amount of time (three hours, four days, and so on) it takes to carry out the task associated with the project or activity.

**RESOURCES** This refers to the changes in access to capital (income, land, credit) as a consequence of the project, and the extent of control over changes in resources (more or less) for each level of analysis.

**CULTURAL FACTORS** This refers to changes in social aspects of the participants’ lives (changes in gender roles or status) as a result of the project.

# NEXT STEPS

## RATIONALE

A missing step in many training workshops is how the information learned will be applied by the participants. In this session, participants will work in associate Peace Corps director (APCD)/ counterpart teams to determine specifically how they will apply the information gained to their development project(s).

## TIME



2 hours

## GOALS AND OBJECTIVES

### GOAL

To begin to apply and share the learning from the workshop with respect to specific project programming and training.

### OBJECTIVES

1. To apply learnings from the workshop to a specific project, working in groups of APCDs with host country counterparts for that project.
2. To share plans with other participants.
3. To consider how to share information from the workshop with Peace Corps staff and Volunteers in their country.

## SESSION OUTLINE

- I. Introduction (10 minutes)
- II. Small group work (60 minutes)
- III. Report out and discussion (50 minutes)

## TRAINER PREPARATION



If APCDs have more than one project, and have counterparts for more than one project attending the workshop, attention must be given to how they will work during this period.

## HANDOUT

- Next Steps Worksheet

## PROCEDURE



### I. INTRODUCTION (10 minutes)

A missing step in many training workshops is how the information learned will be applied. In this session, you will work in APCD/counterpart teams to determine specifically how you will apply the information gained to your development project(s).

Distribute and review the “Next Steps Worksheet” handout.

After you have worked on your own projects, you will have a chance to share with the rest of the group; that way you can learn about other possibilities.

### II. SMALL GROUP WORK (60 minutes)

Allow the groups to work. Give a five-minute warning for end of this work period.

### III. REPORT OUT AND DISCUSSION (50 minutes)

Ask for participants to share their plans. Encourage questions and discussion of their ideas.

Ask these two additional questions of the group:

1. In what ways could you share what you have learned in this workshop with Peace Corps staff and Volunteers?
2. What role(s) would Volunteers play in achieving project goals/objectives? How would their role in the project be communicated to them?

# **NEXT STEPS WORKSHEET**

**Project** (current or proposed)

**Possible Modifications Needed Due to Gender Variables**

**Constraints and Opportunities**

**Next Steps**

**By Whom**

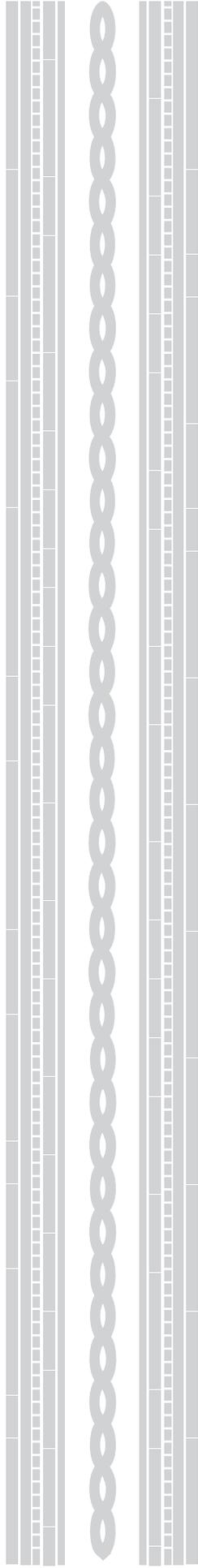
**Resources Needed**

- 1.
- 2.
- 3.

**Questions To Be Asked/Information Needed**

**Who/what will be affected by this change?**

**Implications for Training** (Volunteers, Peace Corps staff, counterparts, etc.)



# APPLICATION TO PROGRAMMING AND TRAINING

## TIME



2 1/2 hours

## GOAL

To have a group of trainers and programmers discuss in depth where and how the knowledge of and skills for gender and development (GAD) and PACA should be integrated into programming and training.

## SESSION OUTLINE

- I. Introduction (15 minutes)
- II. Group work (1 3/4 hours)
- III. Report out (30 minutes)
- IV. Transition (1 minute)

## TRAINER PREPARATION



Trainers and programmers will have attended a minimum of one day of GAD/PACA training.

## HANDOUT

- Depth of Knowledge/Skills as Related to Job Requirements

## PROCEDURE



### I. INTRODUCTION (15 minutes)

Explain that in this session participants will have an opportunity to consider how the content of the workshop can be applied to Peace Corps programming and training.

Review the GAD/PACA training program, highlighting the concepts and tools introduced.

## II. GROUP WORK (1 3/4 hours)

Present the group task (see goal).

Divide the participants into two or more groups to work for 1 3/4 hours. Provide copies of the handout, as needed. Use the following tasks, or modifications of them:

### Task #1 (for training)

- A. Discuss and detail where/what/how/to whom the concepts of gender and development should be introduced and integrated into training of Peace Corps personnel and trainees. Suggest the depth of knowledge/skills which would be appropriate for each. Develop a list or a matrix.
- B. What do you see as your (individual, position) roles in any of these steps?

### Task #2 (for training)

- A. Develop a list of training sessions (specific topics, not general concepts) in which gender considerations could be integrated with other content. Identify them by training events (such as pre-service training, in-service training, training of trainers, staff retreats, etc.) and by training component (such as a technical, language, cross-cultural, role of Volunteer in development, personal health and safety, etc.)
- B. What do you see as your (individual, position) roles in implementing these suggestions? By what mechanisms (your writing, training) can they be accomplished?

### Task #3 (for programming)

- A. Discuss and detail where/what/how/to whom the concepts of gender and development should be introduced and integrated into programming. Indicate the depth of knowledge/skills which would be appropriate to whom. Develop a list or matrix.
- B. What do you see as your role in any of these steps?

## III. REPORT OUT (45 minutes)

Each group reports out. Copies of their work are duplicated and shared with others.

## IV. TRANSITION (1 minutes)

This session could be followed by individual “Next Steps” planning, or by country team planning, if they are attending training as a group.

## DEPTH OF KNOWLEDGE/SKILLS AS RELATED TO JOB REQUIREMENTS

The Peace Corps' efforts to institutionalize the inclusion of girls and women in the development process requires a system of implementing training. It is clear that everyone within the Peace Corps does not need the same depth of knowledge or level of skill related to gender concerns. Because of job responsibilities, some might need skills to carry out gender-sensitive activities, while others might need only an awareness and understanding in order to support others' activities.

In determining the type of gender and development training the Peace Corps provides to its staff, trainees, Volunteers, and host country counterparts and colleagues, the following seven categories are considered. Note that one might gain **knowledge** in some area without having the practice **during training** which would produce **skills**. Therefore, the choice of the word knowledge or skills should be an indicator of what a training program would produce and would indicate how the training program needs to be designed.

1. Awareness
2. Commitment: motivation, finances, resource people
3. Knowledge about or skill in selecting, using, and analyzing data gained from gender analysis tools
4. Knowledge about or skill in application of findings of gender analysis
5. Knowledge about or skill in identifying gender issues in monitoring and evaluation
6. Knowledge about or skill in reporting lessons learned
7. Skill in training others in GAD concepts and gender analysis skills

This list is modified from "The Basic Elements of Institutionalization," The Gender Concerns In Development (GCID) Framework, from the Gender in Economic and Social Systems (GENESYS) Project, USAID.

# ACTION PLANNING

## RATIONALE

A missing step in many training workshops is how the information will be used by the participants when they are back on the job. In this session, the participants will consider different types of applications, and then individually work on an action plan that covers the next year.

## TIME



1 1/2 hours

## GOAL AND OBJECTIVES

### GOAL

To begin to consider specifically how the information learned during the workshop will be applied to one's specific situation.

### OBJECTIVES

1. To brainstorm with others in the workshop potential applications of the information.
2. To develop for oneself a specific action plan for the coming year.
3. To consider how to share information from the workshop with colleagues.

## SESSION OUTLINE

- I. Introduction (15 minutes)
- II. Individual work (45 minutes)
- III. Group discussion (30 minutes)

## TRAINER PREPARATION



Prepare a quick review of the training content to use in the introduction. This might be aided by a list of workshop objectives or the schedule, if prepared on flip charts.



## MATERIALS

- Blank flip chart paper
- Markers
- Tape

## HANDOUT

- Action Plan

## PROCEDURE



### I. INTRODUCTION (15 minutes)

- State that a missing step in many training workshops is how the information learned will be applied. In this session they will consider how they will personally apply the information gained when returning to their office and job.
- Begin by reminding the participants of the content of the workshop by briefly reviewing the objectives or the schedule. (A participant may be asked to do this.)
- Ask participants to silently think about how the information in the workshop might be applied to their work, to the work of others in their offices or community, to trainees or Volunteers they work with, to community members.
- After two or three minutes of silent reflection, ask them to brainstorm a list of applications. Brainstorm in the strictest sense: calling out ideas that are listed on the flip chart exactly as stated; no discussion; piggy-back on others' ideas; add different ideas if don't agree with what is listed. Brainstorm for five minutes or until the ideas slow down. Then stop and ask them to look over the list. If they have questions about an idea, they may ask for clarification, but don't debate the validity of the ideas. Leave the list posted in the front of the room.

### II. INDIVIDUAL WORK (45 minutes)

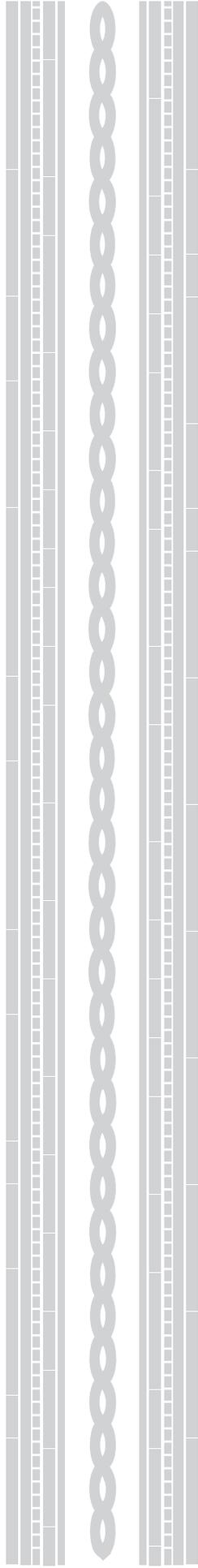
- Ask participants to consider individually what specifically **they** will do to apply the information learned in the workshop. Give them a few minutes to think.
- Distribute the "Action Plan" handout. Indicate that they can use that format, if it is helpful, or they can create their own. Their action plan, however, should include specific tasks placed in time frames. Give them 45 minutes to work.

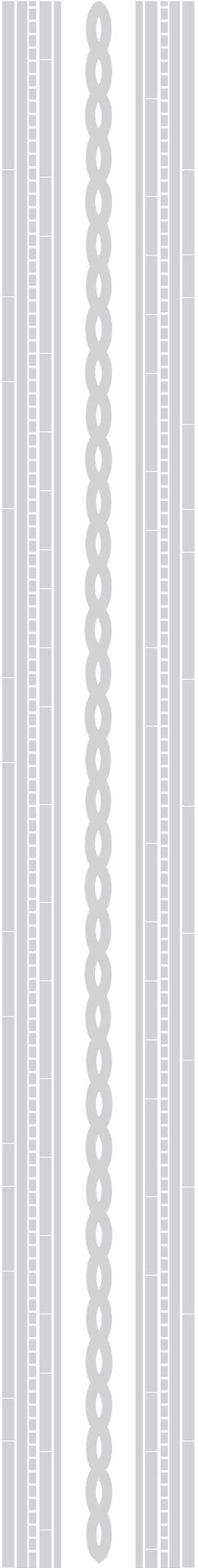
### III. GROUP DISCUSSION (30 minutes)

- Ask for a few participants to share their plans.
- Ask if anyone has an idea but needs some help in how to carry it out. Encourage the group to offer ideas.
- If no one has mentioned it, ask in what ways they can share what they have learned in this workshop with their colleagues.

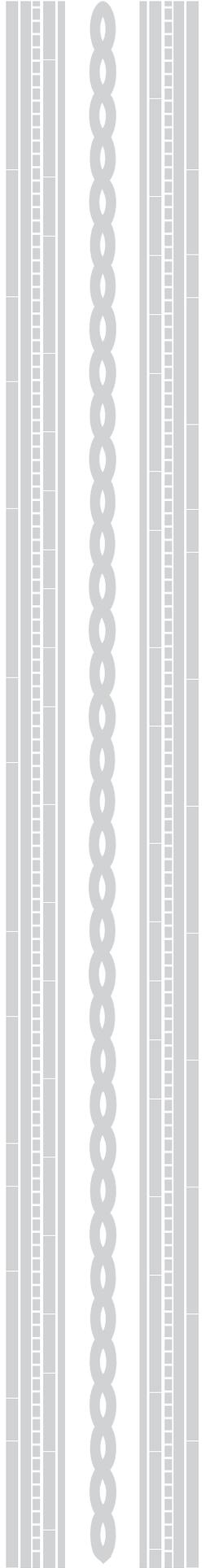
# ACTION PLAN

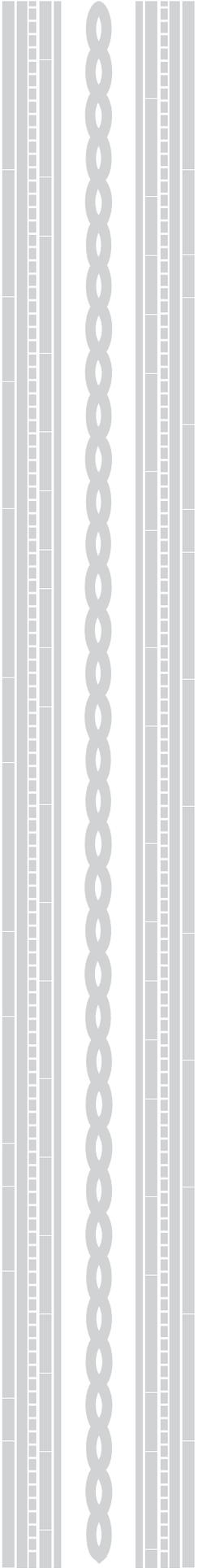
Tasks (specific) In next month	By end of __ months	By end of __ months	By end of year





# APPENDICES





# APPENDIX I

## DEVELOPMENT OF PACA: A TIMELINE OF EVENTS

<b>INITIATION OF GENDER AND DEVELOPMENT TRAINING ACTIVITIES</b>	
May 1993	Gender and development approach introduced to headquarter staff with presentations to Volunteer Recruitment and Selection, Office of Training and Program Support, and regional chiefs of operations and programming and training officers (PTOs)
June 1993	Gender analysis concept introduced into overseas staff training
August 1993	InterAmerica regional environment and education workshop for associate Peace Corps directors (APCDs), Ecuador; GAD concepts introduced; need for tools appropriate to Peace Corps identified
January 1994	WID Supplement to Programming and Training Systems (PATS) Manual written using a gender analysis approach
August 1994	Women in agriculture workshop, Latin America, Caribbean and Lesotho APCDs, held in Ecuador; participatory rural appraisal (PRA) tools modified to be gender sensitive
September 1994	InterAmerica region asks to pilot GAD training project. Country directors (CDs) trained prior to CD conference in Panama and pilot countries identified Africa Francophone environment and education regional workshop introduces GAD concepts
November 1994	InterAmerica PTOs and training directors receive training at their regional conference in Jamaica
February 1995	Africa Anglophone environment and education regional workshop introduces GAD concepts
April 1995	Headquarters training of technical specialists and operational personnel from InterAmerica, Africa, and Europe/Central Asia/Middle East Philosophy and key elements of PACA developed; initial training and resource manuals drafted
June 1995	Training of trainers (TOT) for five pilot countries in InterAmerica held in Paraguay, followed by local Paraguay APCD/counterpart training
September 1995	PACA introduced at WID workshop for urban secondary and university teachers, Turkmenistan; replicated by government of Turkmenistan for 75 participants two months later. PACA daily activities session appears on World Wide Web through World Wise School program; American girls compare their activities to girls in Paraguay, Poland, and Cape Verde

October 1995	PRA “harvest” workshop for trainers and programmers from East and Southern African countries held in Swaziland; PACA guidelines and recommendations developed
November 1995	Peace Corps shares GAD and PACA approaches at World Bank’s “Beyond Beijing” marketplace for gender resources, Washington, DC
February 1996	PACA methodologies introduced in Africa subregional education staff training/TOT in Eritrea. PACA becomes a key component of community content-based instruction (CCBI) framework and introduced at in-service training (IST) for education Volunteers and counterparts in Eritrea
March-April 1996	GAD/PACA in-service trainings piloted in Guyana and Suriname. Four and five-day models developed; shorter, integrated introductory sessions developed; initial participatory analysis of potential projects training materials developed  PACA introduced at overseas staff training; participatory mapping session showed links to programming system  Anglophone Africa language coordinators conference developed recommendations for integration of PACA in language studies and sequencing of training
May 1996	Albania WID conference uses needs assessment tool to identify rural-urban differences in women’s priorities leading to January 1997 PACA IST  Romania WID Conference introduces PACA tools to leaders of women’s groups
June 1996	Draft PACA materials distributed to posts and feedback requested  Community content-based instruction development forum in Washington, DC; Country director of Peace Corps/Ethiopia describes how PACA was used to shape country program  PACA development forum in Washington, DC; staff participate in organizational mapping
August 1996	PACA TOT for Africa Sahel subregion APCDs, Volunteers, and counterparts with field work in rural and urban communities
September 1996	Food and Agriculture Organization of the United Nations (FAO) requests PACA materials to be included in their Social, Economic, and Gender Analysis Programme (SEAGA)
October 1996	PACA introduced in Europe/Central Asia/Middle East region to Central Asia staff at a subregional training workshop in Kyrgyzstan, followed by a CCBI IST for TEFL Volunteers and Kyrgyz counterparts
November 1996	InterAmerica monitoring and evaluation conference in Atlanta; PACA introduced as monitoring and evaluation tools
December 1996	<i>PACA Manual</i> published through Peace Corps’ Information Collection and Exchange (ICE); Field Insights section added with field-based experiences and insights

April 1997	Women in agriculture evaluation workshop in Ecuador; PACA used in community evaluation
May 1997	Business development and TEFL staff workshop in Lithuania; PACA used to identify common needs of beneficiaries of both sectors
June 1997	PACA TOT for pre-service training (PST) staffs of community development projects, for Guinea Bissau and Cape Verde in Bissau; integration of GAD and PACA into overall pre-service training designs
July 1997	Africa subregional TOT for TEFL and HIV program staff, in Malawi; CCBI used; teenage student panel uses PACA daily activities format to talk about their lives
August 1997	PACA incorporated into <i>Solid Waste Management Manual</i>
September 1997	Gender and development training; manual completed and distributed to each Peace Corps post

## APPENDIX II

# ADAPTATION OF THE NIGER PACA TRAINING HANDBOOK

## BACKGROUND

The *PACA Manual* is a great resource for learning about the PACA system approach, PACA philosophy, techniques and process. However, the experiences mentioned in that manual do not reflect the reality in Niger. Village communities are often illiterate, and the traditions are very strong, so we developed a training module that conforms to the reality in Niger.

A PACA training evaluation workshop was organized for Volunteers, host country nationals and language instructors who have participated in at least one PACA training session. The workshop reinforced collaboration among Volunteers and host country nationals as well as the staff in Niamey and the trained teams.

At the end of the workshop the following recommendations were made:

- The appropriate/ideal period to train a Volunteer is between the fifth and the twelfth month in his/her post. This permits the Volunteer to gain better local language skills and better knowledge of the community with which he/she is working.
- The best period to conduct a PACA training in a village is the time between the end of harvest and the beginning of the rainy season (in general, from November to early May). This is the time period when villagers are less occupied. During the rainy season, villagers spend two-thirds of their time in their fields.
- Give a period of time of two to three weeks between the first and the second stage of practice and one to two weeks between the second stage and the action plan. This provides time for the team of facilitators to rest a bit, and for the villagers to think about what was previously experienced. However, too much time between the different stages can cause a loss in momentum.

## INTRODUCTION

Since April 1997, Peace Corps/Niger has been implementing PACA. The training is done in teams composed of Volunteers, host country nationals, and Peace Corps staff. The gender and development (GAD) program assistant conducts all the PACA training with the assistance of some language instructors.

This training module has three main steps:

1. Teach trainees the basic notion of PACA during pre-service training. This step is done in two sessions: a theoretical session that covers basic PACA skills and a tool exercise that is done with partners (e.g., the school community).
2. Implement PACA tools in a real environment. There is one theoretical refresher session for Volunteers and one with their counterparts. This permits counterpart groups to acquire the same level of PACA information as Volunteers. The field practice is done in two phases: exploratory phase and analytical phase.
3. Create an action plan with the community members. This includes learning how the action plan facilitation is conducted and what the role of the Volunteer should be during the action plan implementation.

The fourth chapter of this module demonstrates how a PACA team is organized and explains the work process.

Finally, this manual provides some advice to the PACA facilitator on:

- Facilitation skills
- Attitude and behavior
- Cultural diversity within a facilitator team
- Situations (case studies)

## **I STEP 1: PACA BASIC NOTIONS**

Trainees are taught basic PACA theory and skills during pre-service training.

### **1.1 First Session**

The first session covers:

- The background and importance of a participatory approach
- PACA philosophy, methodology, and process
- Field work and cultural aspects
- PACA tools
- Facilitation techniques
- Exercises (role plays among trainees)

### **1.2 Second Session**

The second session consists of an exercise in the field with a real village community. We often work with the junior high school community as partners. For example, one time the “problem tree” tool was used to debate the issue of girls’ education in Niger. We worked with four groups: male students, female students, male teachers, and female teachers. During this exercise, we worked with the language instructors who facilitated the discussions. We also encourage trainees to facilitate if they choose.

## II STEP 2: PACA TOOLS PRACTICE

This step consists of Volunteers and their host country colleagues implementing PACA tools with the village communities where Volunteers work.

These tools have already been previously described. We do not consider the community members as laboratory specimens and for this reason the field ground work is always conducted in a village where a Volunteer is posted. This way, after the facilitator team's departure, the host Volunteer and his/her PACA-trained counterpart can continue the process by implementing the activities listed in the action plan together with villagers.

### 2.1 The Theoretical Stage

Before the field work starts, the host country nationals receive a full day of training and the Volunteers receive a half day of training.

#### 2.1.1 Half Day With Volunteers

The half day with Volunteers is an overview of the following topics:

- Volunteers summarize what they learned about PACA during pre-service training
- PACA tools and their goals (including handouts)
- Explanation of the training process and how the practice will be done in the village
- Role of the facilitator (review)
- Highlight of the facilitation techniques (review and explain the difference between facilitating and guiding)
- Case studies and cultural advice on how to behave in the village as a facilitator
- Team building

#### 2.1.2 One Day With Host Country Nationals

The training of the host country nationals covers the following:

##### Session 1: “What do we know about the Peace Corps?”

- The three goals of the Peace Corps
- The Volunteers and their roles

*Note: Sometimes host country nationals don't know exactly what the Peace Corps is and what a Volunteer's role is. As PACA training/work needs to be done in a team, it is necessary that both Volunteers and host country nationals know each other's work and roles. This avoids mistaken expectations and frustrations and can reinforce collaboration.*

##### Session 2:

- Brief summary of the participatory approach systems
- Introduction to PACA
- The notion of gender
  - the difference between gender and sex
  - the impact of gender in development projects

- Philosophy and the PACA process
- The notion of filters
- The PACA tools
- The role of the facilitator
  - facilitation techniques
  - the difference between facilitating and guiding
- Team building
- Cultural advice
  - case studies
  - how to react or behave as a facilitator
- Role play on implementing the tools

Usually the different members of the team get together for a lunch or a party to introduce themselves.

## 2.2 Field Practice

After participants learn basic PACA theory, the team moves to the field for practice. Field training consists of using the different tools with real community members.

This training module has eight tools:

1. Daily activities schedule
2. Historic profile (village/community history)
3. Community/village map
4. Transect walk
5. Seasonal calendar
6. Community foundation/social map
7. Needs assessment
8. Problem tree

*Note: Only four of these tools are detailed in the PACA Manual, the others are tools used in PRA.*

The work is conducted in small, separate group meetings, and both community members and facilitators gather for a “restitution meeting.” At the end of each small group meeting, participants choose one representative who shares with the other groups what was discussed in his or her group. This is common to all the groups: women and men, young and old.

Each day the team uses a tool with the different members of the community in small, separate groups. A big meeting for sharing is always planned at night with all the community members. This is common for all the tools. That makes a total of eight days of practice in the village, carried out in two different phases.

Two phases compose the field work:

1. *Exploratory Phase.* This phase consists of implementing the first four tools (daily activities schedule, historic profile, community/village map, transect walk) with the community members. This phase is called exploratory because it is more about discovering the community through members' daily habits, backgrounds, and local resources.
2. *Analytical Phase.* This phase utilizes the last four tools (seasonal calendar, community foundation, needs assessment and problem tree). This phase is called analytical because it's the diagnostic part. This phase looks for why, how, and when something happened. Villagers think about their needs and constraints by trying to find out the reasons behind these needs and constraints, the impact they have on the community's well-being and development, and what the community should do to address them. Villagers often prefer this phase because:
  - They have used and understand the PACA process (especially women who feel more and more comfortable talking in front of a crowd); and
  - The tools focus on the villagers' everyday activities, their problems and/or their needs.

This phase was described by a villager in eastern Niger one day: "We were laying down before; now, we've woken up."

### 2.3 Preparation at Village Level

PACA training is a team effort that involves different people and considerable logistics—the village hosting the event needs to be well prepared. Inform the village community well in advance to allow for preparations. The host Volunteer should call one or two meetings to explain the following to the villagers:

- Goals and objectives of the training.
- How the training will be conducted (e.g., people will be split up into groups according to age and/or sex—old men, young women, old women, young men).
- The different groups should decide on the time when they are free to work with the PACA facilitator team. (Note: It is important to follow the community members' agenda rather than imposing the facilitator's agenda on the community.)
- The importance of people listening carefully to each other (e.g., men to women, young to old).
- The villagers should provide lodging for the facilitator team (often two houses; one for men and one for women).

## III THE ACTION PLAN

The action plan is a four-column chart. Its objective is the resolution of the problems identified by the community itself through *community action*. The action plan consists of developing a work plan of some achievable tasks that the villagers choose to work on because of locally available resources and abilities for a period of time that they set by themselves.

Unlike the process of using the tools, which consists at first of small group discussions and then in larger groups, the action plan is created in a large group (with all the community members sitting around a circle).

### 3.1 Facilitation of Action Plan

The facilitator should be patient and observant because this is an important part of the training. There should be good communication from one group to another so that people can talk and give their opinions freely on the different components of the plan. Also, it is important to let people express their feelings completely without being interrupted or influenced.

Each group should explain how it intends to work not only on its own activities but also the activities of the other groups: that's what *community action* is about.

### 3.2 Role of the Volunteer in Working on the Action Plan

During the PACA process, a partnership is formed between villagers and Volunteers. Through PACA, villagers understand that Volunteers and technical agents should not be the only people spending their efforts and energy on community development. The PACA process is like the well-known Chinese proverb: “*Give a man a fish and he eats for a day. Teach a man to fish and he eats for a lifetime.*”

However, the villagers may need external help once they encounter difficulties or when they run out of resources. Volunteers can serve as a link between the community and other funding sources such as NGOs and associations (both local and foreign), projects, and funding partners. These NGOs and associations can fund certain activities. It's good for Volunteers to have the list of development services working in their region and also to know their requirements. Volunteers have the responsibility, whenever the need arises, to send a project proposal requesting funding. Other members of the team should help the Volunteer as much as they can for a good and effective follow-up of the action plan.

## IV TEAM ORGANIZATION AND WORK PROCESS

In the village, the team members live in two separate areas provided by the community: one for men and another one for women. Meals are taken together. The facilitators should split up into small groups: sub-teams composed of two to four people to help the villagers practice the tools according to their work time.

### 4.1 The Sub-Teams

A sub-team is often composed of:

- *Facilitator*. Facilitates discussion in the local language. When practicing this role, remember and apply the facilitation techniques and strategies learned. Also consider the cultural advice mentioned during theoretical training.
- *Observer*. Observes the skills of the facilitator as well as the reaction of the members of the group. This person should note all observations and share them during the facilitator team meetings.

- *Note-taker/reporter.* Takes notes and reports all symbols, drawings and figures that result from the group discussion.

The other members of the group should participate in the discussion and activities.

#### 4.2 The Facilitator Team Meetings

After the small group meetings, there should be time for the facilitation team to sit down, share appreciations, make suggestions, and give feedback. It is also an opportunity to clarify certain details and give advice if necessary.

#### 4.3 The Restitution Meeting

The restitution meeting is the big group meeting involving all the members of the community and the facilitation team. During this meeting, the chosen representatives of the small groups show their work to the other members of the community (e.g., their village map), share their discussion conclusions, and give clarification by answering any questions asked by the other groups.

*(Note: This is a big, important, and difficult step, especially for women. They often do not have access to speaking in public, they are rarely asked for an opinion, and they usually do not participate in community decision-making.)*

Someone from the facilitation team conducts the restitution meeting. After each practical phase, each member of the facilitation team should go through the following tasks: facilitation, note-taking and observation. Volunteers are also invited to go through these tasks according to their local language level. Usually team members help them to prepare useful words and expressions for the facilitation. Sometimes the Volunteers can work in pairs with a native speaker for facilitation.

#### 4.4 Training Evaluation

An evaluation meeting is held at the end of each practical phase to let people talk freely about:

- What they learned from the training
- Any assistance they got from the training
- What they found difficult
- Strategies, ideas, or techniques to be used next time
- Strategies to reinforce team building
- Logistics
- Any other comments about the training

This evaluation session should be open, fair, and clear. Give the team the choice to evaluate verbally or in writing.

## V SOME ADVICE TO THE PACA FACILITATOR

### 5.1 About Facilitation Skills

The facilitator plays a critical role in the PACA training process. Even though all the information generated through the PACA process already lives within the community, PACA tools help community members identify this information and arrive at conclusions that are relevant, and not always obvious.

Sometimes people think that being able to speak a local language perfectly means they can facilitate a discussion in a PACA working group. While language skills are helpful, a facilitator needs interpersonal skills as well as language communication skills. A good facilitator knows which questions to ask and how to ask them.

Facilitators should try to be:

- patient
- observant
- able to keep your temper
- self-confident and assured (even if their language ability is not the best)
- open-minded to better understand cultural differences
- polite and respectful
- modest

### 5.2 Attitude and Behavior

Local government officials are generally considered by the villagers as high-class citizens. The reason is clear: these government officials or *Mouchés* are educated people who live mostly in the big towns and cities. They have salaries and higher incomes that make their living conditions better. They dress nicely. These officials, once they get to the village, have a certain attitude that confirms these impressions. All this creates a complex relationship between the officials and the communities they are supposed to serve.

PACA urges full participation of different community groups. Facilitators should be able to overcome any barrier, any obstacle they may come across while fulfilling the group's work. Facilitators should always consider their role as a facilitator for group discussion. They should create a relaxed working atmosphere to make the group members feel at ease. That's the best way to get accurate and spontaneous information from villagers.

To meet that need, here are some tips.

- Follow the village protocol when introducing yourself to the community members.
- Participate in any social event or ceremony—happy or sad—that may occur while you are in the community (go to *fatiha* for social ceremonies or go to a funeral for condolences).
- Make a tour of the village and say hello to people.
- When you come to a meeting, if people offer you a chair, humbly refuse it and sit down on the ground just as they do.

- Don't be judgmental; listen carefully to what community members are saying.
- Take control of the discussion in a polite way.
- Watch out for cultural offenses.

When leaving the village, facilitators should follow the cultural protocol as they did on the first day when they introduced themselves.

### 5.3 Cultural Diversity Within the Group of Facilitators

Usually, a PACA team is composed of Volunteers and their counterpart host country nationals. These host country nationals are often government employees working in the same domain as Volunteers (e.g., agriculture, environment, health) or literate villagers. In both cases, a Volunteer should consider some criteria before choosing someone to be trained in PACA. Qualities such as motivation, patience, dynamism, and flexibility are required.

Host country counterparts represent different ethnic groups and backgrounds. It is important to consider people's background and differences. For example, if a Volunteer values punctuality and sets punctuality as criteria to choose someone for PACA training, he or she may be disappointed that host country nationals value patience ahead of punctuality. Volunteers should challenge themselves to accept people no matter where they are from and what their cultural and ethnic backgrounds are.

### 5.4 Situations

There are situations when a PACA facilitator may feel uncomfortable and may ask questions such as: What can I do? How should I react? Such situations are unpredictable and unavoidable. Below are three examples. Read these situations carefully and work them out to find appropriate responses/solutions.

#### **Situation 1:**

During a PACA training in a village, facilitators are conducting the transect walk tool with a group of young girls when two old men slip into the group and take full control of the discussion. The situation makes the girls uncomfortable and embarrassed and they refuse to answer any question they are asked. The facilitator gets frustrated and tries to resolve the problem.

*Question:* How can the facilitator react in such a situation and deal with the matter?

#### **Situation 2:**

While presenting the village history during a PACA session, a dispute breaks out when people recount sad events that divided two families in the village. People get on each other's nerves and the situation starts to get out of control.

*Question:* What should the facilitator do in a situation like this?

**Situation 3:**

While presenting a PACA tool with a group of men, a participant completely interrupts the conversation and takes control of the session. Carefully and tactfully, the female facilitator interrupts the man. The man persists and refuses to be quiet. He is apparently shocked because a woman asked him to be quiet.

To avoid any misunderstanding, the facilitator gives up on the matter. A colleague from the facilitating team asks the angry man to keep on talking. The situation then turns from bad to worse and the tension gets high in the group of Volunteers. The female Volunteers are deeply shocked by the intervention of the second (male) facilitator who told the man to keep talking. They think that the facilitator should not contradict his female colleague. The Volunteers consider the intervention of the second facilitator to be disrespectful and unsupportive of his female colleague. To attempt to settle the matter and make everything clear, the facilitating team meets in private. People at the meeting try as hard as they can to give an explanation but the Volunteers do not agree.

*Question:* If you were in this group of facilitators how would you calm the situation? How would you deal with this example of culture shock?

**CONCLUSION**

PACA tools are used for data collection and analysis as well as for action planning. They can also be used for evaluating finished or ongoing projects. The PACA process is an ongoing cycle that facilitates community integration in every step of the development process. PACA helps people be aware of their local resources, how much they use them to their benefit, and how they can use them effectively. Communities develop more autonomy and the cycle of dependency on development projects and organizations can be broken. PACA creates a partnership between the development agent/Volunteer who uses it and the community with which she or he is working. PACA allows Volunteers to know their community and its members better, understand the community's daily and seasonal occupation/calendars, recognize constraints and needs, highlight their resources and their ambitions, and more.

## APPENDIX III

### THREE TOOLS FOR INTRODUCING THE *PACA IDEA BOOK* [ICE NO. M0086]

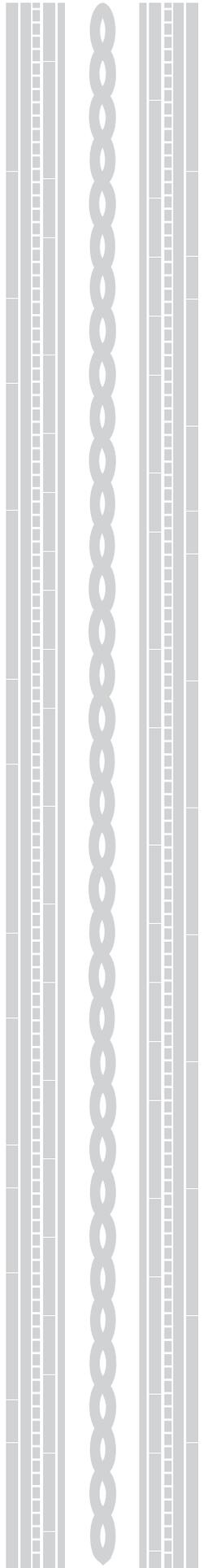
#### A. QUIZ

For use in introducing the PACA Idea Book to new audiences. Suggest participants form teams—at least pairs—to look for the answers. A prize would be nice! Reference to where answers are located are listed here for the trainers' convenience. The quiz is on the following page in reproducible form.

1. What do the letters in PACA stand for? What is PACA? *Chapter 1, page 18*
2. What is triangulation? How is it used in PACA? *Chapter 3, page 54; Appendix II.*
3. How is PACA useful in understanding gender roles? *Chapter 1, pages 24-27*
4. What causes filters that affect what you see and do? *Chapter 4, pages 62-64*
5. Where can you find advice on creating diverse teams to conduct PACA?  
*Appendix III, pages 160-162, 169-171*
6. What are some different ways people can prioritize their wants and needs?  
*Chapter 5, pages 112-115*
7. What are some ways trainees/Volunteers can practice PACA to gain skills?  
*Chapter 4, Pages 75-79*
8. How is a facilitator different than being a strong group leader? When is each used in PACA? *Chapter 4, pages 70-74*
9. What are three different ways seasonal calendars might be used?  
*Chapter 5, pages 103-111*
10. What are some ways PACA tools can be used with youth?  
*Chapter 2; Chapter 5, pages 101, 110*
11. How would conducting mapping with a community/neighborhood be different than mapping with a co-op or group of small business owners? *Chapter 5, pages 87-92*
12. How have participatory tools been used to help communities understand risks for contracting HIV/AIDS? *Appendix II*

## QUIZ

1. What do the letters in PACA stand for? What is PACA?
2. What is triangulation? How is it used in PACA?
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12. How have participatory tools been used to help communities understand risks for contracting HIV/AIDS?



## B. READER'S GUIDE

This reader's guide can be used for self-study of the *PACA Idea Book* [ICE No. M0086]. In addition to a synopsis of the chapter or appendix, it provides some reflective questions that highlight the main ideas.

### Chapter 1: The Peace Corps' Approach to Development

Chapter one sets the context with a description of the Peace Corps' capacity-building approach to development, the role of participatory activities in that approach, and information on how to better understand the impact of gender roles and relations in community development.

- How do PACA activities contribute to sustainability?
- Why is gender analysis an important aspect of development?

### Chapter 2: What Are the Core PACA Tools?

Chapter two describes the four primary participatory tools used in PACA along with a variety of examples that illustrate how they have been used.

- What are some uses of the tools you did not expect?
- How might presentation and discussion of maps, daily schedules, and/or priorities affect some of the different subgroups involved?

### Chapter 3: What Happens After Analysis?

Chapter three demonstrates that conducting a PACA activity, or several of them, is not the end product. Though helping diverse people come together to identify their common goals can be both challenging and fulfilling, using the tools with the community initiates and facilitates a process of planning and acting to achieve those goals.

- Why is triangulation often wise before a community begins a new activity?

### Chapter 4: Preparing for PACA

Chapter four identifies the specific skills needed to conduct participatory activities, provides guidelines for practicing in actual communities, and addresses some of the challenges for Volunteers.

- What do you know about how your filters affect who you talk to/interact with? Respect? Trust? Describe what you see in an unfamiliar cultural environment?
- How can you improve your existing skills in interviewing and facilitating discussions with people from a different culture?

### Chapter 5: How to Use the Most Common Tools

Chapter five describes how to conduct community mapping, daily activity schedules, seasonal calendars, and needs assessment/priority ranking. Descriptions include examples of how questions and debriefing might be varied depending upon the group and purpose for using the tool.

- Considering your language and facilitation skills, describe a situation in which you could practice conducting each of the four tools. Who would you like to have assist you? (Refer to page 45 if you need ideas for urban areas. Appendix III also has ideas.)

## Chapter 6: Using Other Participatory Tools

Chapter six describes additional activities and resources for participatory analysis and discusses key factors to help ensure that you use any tool in a gender-sensitive way.

- Study one of the two additional tools described in detail. Consider what important information might be revealed to your project participants by the use of that tool.

### Appendix I: Bringing the Tools Together: What It Really Looks Like

A report from the field shows the steps, knowledge gained, and subsequent action plans from a community in Senegal that used PACA and related tools.

- How was an appreciative inquiry useful as a first exercise?
- How did the community ultimately start working on activities, without regard to the consensus priority ranking they had done?

### Appendix II: From Tools to AIDS Action

This example of using participatory approaches in Uganda helped community members identify risk factors for HIV transmission.

- What was learned from seasonal calendars?
- How was the use of the tools helpful in gaining knowledge and raising issues?
- What benefit to the community and outside development workers came from these participatory tools?

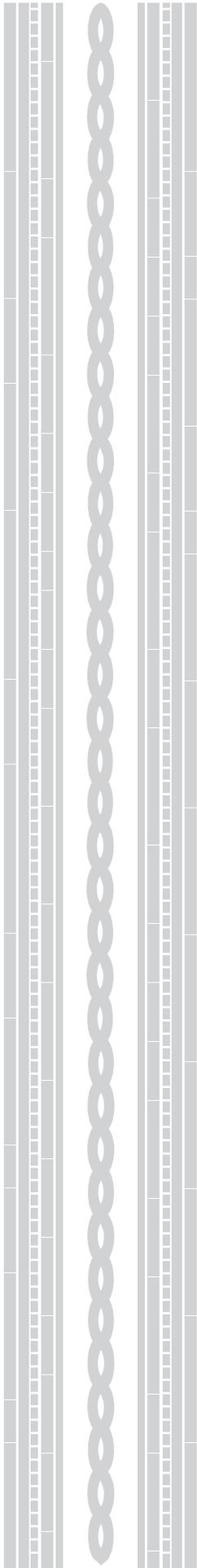
### Appendix III: Adaptation of the Niger PACA Training Handbook

This section provides excerpts from a training handbook designed to supplement the PACA trainers' manual, addressing specific issues in one country.

- How can you form a team with host country colleagues and counterparts to better facilitate PACA activities in your community?

## C. EXPLORE THE PACA IDEA BOOK THROUGH SECTOR GROUPS

The questions on the following page may be used in a sector-specific session and/or with all trainees at once, grouped by sectors. Reporting out some of the questions from different sectors would be interesting to the whole group.



## USING THE PACA IDEA BOOK IN OUR SECTOR

### Chapter 1

1. How is our project trying to build capacity?
2. How is knowledge of gender roles important to what we are trying to do?
3. How can participatory tools help us and our co-workers get a more inclusive knowledge of the development situation?

### Chapter 2

1. What are the four PACA tools? What are they used for?
2. What is an example of the use of each that relates to our sector?

### Chapter 3

1. How do participatory tools lead to action?
2. What is triangulation and how can it be helpful before determining an action?

### Chapter 4

1. What filters do I (we) bring to our assignment with the Peace Corps?
2. What are important events/interactions for us to observe to learn about factors related to our assignment?
3. How might interviewing be important to us in preparing for doing our job?
4. What is my (our) experience with facilitating discussions? When do we imagine we would need to use this skill?
5. What do we think will be our challenges in using PACA? How can we address those challenges?

### Chapter 5

1. For our job assignment, what would we define as a “community”? What things might that community map?
2. Whose daily schedules would be valuable to understand? Why?
3. What seasonal issues effect the people we work with in our job assignments?
4. What are different ways we might help the people we work with to prioritize needs and wants?

### Chapter 6

1. What other participatory tools might be useful to learn and use? Why?

**Appendix I**

1. What ideas from this example might be useful in our jobs?

**Appendix II**

1. What sensitive issues (as you define them) might come to light from an appropriate and skillful use of PACA tools in your sector?

**Appendix III**

1. Who do we envision working with on our project (colleagues, counterparts, etc.)?
2. How might they be trained and involved in PACA?