Harmonized Gender and Development Guidelines

for Project Development, Implementation, Monitoring and Evaluation

Second Edition,
Third Printing



HARMONIZED GENDER AND DEVELOPMENT GUIDELINES

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National Economic and Development Authority
Philippine Commission on Women
Official Development Assistance Gender and Development Network



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A project of the National Economic and Development Authority, the National Commission on the Role of Filipino Women, now known as the Philippine Commission on Women, and the Official Development Assistance Gender and Development Network (ODA–GAD Network)

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PREFACE

The formulation and development of the Harmonized Gender and Development Guidelines (or the Guidelines) for Project Development, Implementation, Monitoring and Evaluation was initiated in 2004 by the National Economic and Development Authority (NEDA) in collaboration with the National Commission on the Role of Filipino Women (now known as Philippine Commission on Women [PCW]), and the Official Development Assistance – Gender and Development (ODA-GAD) Network, with funding support from the United Nations Development Programme (UNDP) and the Asian Development Bank (ADB).

The Harmonized Gender and Development Guidelines serves to ensure that programs and projects undertaken by the government in their various stages are gender responsive. It has been widely disseminated to various government agencies, nongovernment organizations (NGOs), the academe and donor partners. Our experiences with the Guidelines have likewise been shared with other countries, through the advocacy efforts of our donor partners as well as through our representations in international and regional committees.

NEDA has also been preparing reports on the gender responsiveness of ODA programs and projects with the Guidelines as basis since 2006, using data provided by donor partners. In 2009, NEDA achieved a major milestone in its gender and development work by introducing the Guidelines in the as sessment of the gender responsiveness of programs and projects in the 17th ODA Portfolio Review. This effort was sustained in 2010 for the 18th ODA Portfolio Review.

In the meantime, Republic Act (RA) 9710, or the Magna Carta of Women, reiterated the adoption of gender mainstreaming as a strategy to implement its various provisions. The Implementing Rules and Regulations of this law defined the role of NEDA and PCW in advocating for the use of the Guidelines for development, implementation, monitoring and evaluation of all programs and projects intended to promote gender equality and the empowerment of women.

Six years have lapsed since its launching, but requests for orientation, training and coaching on the use of the tool continue to come in. To sustain our advocacy for the use of the Guidelines and to broaden its reach, especially at the regional and local levels, we present this Second Edition of the Guidelines, reprinted through the assistance of the UNDP. We wish to express our thanks for its support.

We call on all development stakeholders to use the Guidelines in the design, implementation, monitoring and evaluation of their programs and projects to ensure their gender-responsiveness and thereby contribute to the protection and fulfillment of women's rights, the promotion of gender equality, and the improvement of the quality of lives of both women and men.

CAYETANO W. PADERANGA, JR.
Socio-Economic Planning Secretary and
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MESSAGE

. . . the full and complete development of a country, the welfare of the world and the cause of peace require the maximum participation of women on equal terms with men in all fields.

The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), often described as the international bill of rights for women, was ratified by 177 countries including the Philippines. By accepting the Convention, states commit themselves to undertaking a series of measures to end discrimination against women in all forms, including the incorporation of the principle of equality of men and women in their legal system, abolition of all discriminatory laws, and adoption of appropriate ones prohibiting discrimination against women. As in other human rights instruments, the CEDAW defines gender equality as a human rights concern.

Furthermore, the Philippines signed the Millennium Declaration, which includes the promotion of gender equality as its third goal. The target of eliminating gender disparity in primary and secondary education, preferably by 2005, and all levels of education not later than 2015, is projected to be reached or even surpassed by the Philippines. Gender equality is integral to the achievement of the Millennium Development Goals (MDGs). Without progress toward gender equality and women's empowerment, none of the MDGs and their targets will be achieved.

Being a signatory to CEDAW, the Philippines has made the Convention a part of the law of the land. It is also one of few countries with gender equality provisions in its Constitution. Section 14 of Article II states that "it recognizes the role of women in nation-building, and shall ensure the fundamental equality before the law of women and men." Other noteworthy laws and policies promoting gender equality are the Women in Development and Nation-Building Act (Republic Act [RA] 7192), the Philippine Plan for Gender-Responsive Development (PPGD), the Anti-Sexual Harassment Act (RA 7877), the Anti-Trafficking in Persons Act (RA 9208), the Anti-Violence against Women and Their Children Act (RA 9262), and laws on Rape (RA 8353 and RA 8505).

For women's rights advocates in government and nongovernment organizations as well as national and local government leaders who adhere to these commitments, the gender and development (GAD) approach is a necessity. It has been proven that any effort toward sustainable development requires the participation of women at all levels of policymaking and policy implementation.

The Philippines has been taking concrete steps toward integrating GAD concerns in the development process. The *Harmonized Gender and Development Guidelines* is a vital contribution to this process of gender mainstreaming. This document is a product of a multisectoral process on the required processes and mechanisms for the Philippine Plan for Gender-Responsive Development as part of our efforts to implement RA 7192, and its Implementing Rules and Regulations; guide the integration of the GAD perspective in development planning processes and various stages of

the project cycle; and address the issues of inadequate sex-disaggregated data and statistics for development planning and programming.

We, the international development partners in the Philippines, are happy to collaborate with the National Economic and Development Authority (NEDA) and the Philippine Commission on Women (PCW) in producing these guidelines. Working together, and with the assistance of a gender expert, we worked out a set of guidelines that harmonizes all our existing guidelines (donors and government). We hope this will redound to a shared understanding of terms and concepts which will translate to doable and concrete steps at each stage of the project cycle to ensure that gender equality gaps are addressed.

Applicable to both spatial and socioeconomic gender-responsive planning, programming, and monitoring and evaluation, these guidelines will enhance the effectiveness of existing development guidelines at the national, regional, and local levels.

We are very pleased with the potential that this document has to guide project managers and implementors. We look forward to these guidelines being consistently applied by NEDA, line agencies, local government units, donor agencies, and civil society organizations in the design, implementation, and monitoring and evaluation of their projects.

As with the original version of the guidelines, we hope that the second edition of the *Harmonized Gender and Development Guidelines* will help fast-track our collective efforts at making gender mainstreaming show concrete results in the quality of lives of women and men, girl and boy children.

ODA-GAD Network

ACKNOWLEDGMENTS

This revised set of guidelines was developed and produced by the National Economic and Development Authority (NEDA), in collaboration with the Philippine Commission Women (PCW) and the Official Development Assistance–Gender and Development (ODA–GAD) Network. We would like to make special mention of the Network members involved in the development of the guidelines, particularly the Asian Development Bank (ADB), Australian Agency for International Development (AusAID), Canadian International Development Agency (CIDA), European Commission (EC), International Labor Organization (ILO), Japan International Cooperation Agency (JICA), United Nations Children's Fund (UNICEF), United Nations Development Programme (UNDP), United Nations Population Fund (UNFPA), United States Agency for International Development (USAID), the World Bank (WB), World Health Organization (WHO), and Voluntary Service Overseas Philippines (VSOP). The UNDP provided funding support for the current reprinting of the second edition of the guidelines.

We are grateful as well to Ms. Jeanne Frances I. Illo, Consultant on guidelines preparation and revision, and Director Erlinda M. Capones of the NEDA Social Development Staff, as well as her team, who served as overall implementor and coordinator for this endeavor.

BACKGROUND

In 1993 the National Economic and Development Authority (NEDA) and the National Commission on the Role of Filipino Women (NCRFW), in conjunction with various Philippine government agencies, produced the *Guidelines for Developing and Implementing Gender-Responsive Programs and Projects.* The document sought to assist line or implementing agencies in (1) complying with Republic Act (RA) No. 7192, known as the Women in Development and Nation-Building Act, and its Implementing Rules and Regulations; (2) integrating a gender and development (GAD) perspective in development planning processes and various stages of the project cycle; and (3) addressing the issues of inadequate sex-disaggregated data and statistics for development planning and programming.

Since the mid-1990s, most official development assistance (ODA) donors have also crafted their own GAD guidelines to assist their officers, contractors, and local partners in incorporating GAD concerns in the design and implementation of their programs and projects. By early 2003, or ten years after the Philippine government issued its GAD guidelines, Philippine government agencies had been contending with often overlapping GAD checklists.

In mid-2003, NEDA and the Official Development Assistance Gender and Development Network (ODA-GAD Network) agreed to harmonize GAD requirements after reviewing the existing checklists for project development, implementation, and monitoring and evaluation (M&E). This initiative aimed to produce a common set of guidelines for the Philippine government agencies and donors while allowing variations in priorities among them.[1]

The new GAD guidelines reflect the evolution of assistance framework from Women in Development (WID) to GAD and the current focus on women's rights. The current version of the guidelines also incorporates the suggestions of many groups in the Philippine government that have tried the original set of guidelines.[2]

OBJECTIVES AND CONTENTS

The harmonized GAD guidelines seek to promote the twin goals of gender equality and women's empowerment. Specifically, these aim to:

1. provide NEDA, ODA donors, Philippine government agencies, and development practitioners with a common set of analytical concepts and tools for integrating gender concerns into development programs and projects; and
2. help achieve gender equality in, and empower women through, projects and programs.

[1]The World Bank, in coordination with NEDA, compiled sets of guidelines and disseminated them during the 1 April 2003 Network meeting. A consultant was hired to simplify and harmonize the existing guidelines of NEDA, NCRFW, and ODA donors. The United Nations Development Programme (UNDP) provided the initial funds, while NEDA led and managed the initiative.

[2]The revision of the guidelines was supported by a technical assistance grant from the Asian Development Bank to NEDA.

CONTEXT OF THE GUIDELINES

RA 7192 provides the legal mandate for involving women in development (see sidebar). An additional mandate comes from the *Philippine Plan for Gender-Responsive Development (PPGD),* which envisions a society that promotes gender equality and women's empowerment and upholds human rights, among other development goals. It also commits the Philippine government to addressing issues of poverty, violence against women and other abuses of women's human rights, and the continuing invisibility of women in public affairs (see box 1).

Another document, the *Framework Plan for Women* focuses on women's economic empowerment, the protection and fulfillment of women's human rights, and the promotion of gender-responsive governance. The Philippine government has adopted gender mainstreaming as its principal strategy for pursuing these goals.

Excerpts from the Implementing Rules and Regulations of RA 7192 (Rule 1, Section 2)

"The State recognizes the role of women in nation building and shall ensure the fundamental equality before the law of women and men. The State shall provide women rights and opportunities equal to that of men.

"To attain the foregoing policy:

a. A substantial portion of official development assistance funds received from foreign governments and multilateral agencies and organizations shall be set aside and utilized by the agencies concerned to support programs and activities for women . . .

b. All government departments shall ensure that women benefit equally and participate directly in the development programs and projects of said department, specifically those funded by official foreign development assistance ...

c. All government departments and agencies shall review and revise all their regulations... to remove gender bias therein."

Development assistance from individual donors in the Philippines is governed by the PPGD and donor policies and strategies. The latter are shaped by national priorities of donor countries or policies of governing boards of multilateral aid agencies, as well as by international agreements. These agreements include the *Beijing Platform for Action*, the final document of the United Nations (UN) Fourth Conference on Women in 1995; the UN Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), which provides a framework within which a range of issues may be addressed based on a core understanding of nondiscrimination and equality; and donor commitments to Organisation for Economic Cooperation and Development (OECD) policies contained in the 1998 *DAC Guidelines on Gender Equality and Women's Empowerment in Development Co-operation.* The twin goals of gender equality and women's empowerment articulated in the OECD Development Assistance Committee (DAC) gender guidelines are echoed in most of the GAD policy statements and guidelines of the major bilateral and multilateral ODA partners of the Philippines. The core requirements of the harmonized GAD guidelines apply to development programs and projects, although their application may slightly vary according to the funding focus and priorities of the donors.

The GAD guidelines of bilateral and multilateral donors are generally based on a strategy that treats "gender," GAD, or gender equality as a crosscutting theme—one that needs to be

Box 1. PPGD strategies, goals, and vision

Strategies	Goals	Vision
☯ Enhancement of sustainable access of women to capital, market, information, technology, and technical assistance ☯ Enhancement of employment and livelihood skills of women, particularly in high-value-adding industries and agricultural activities ☯ Establishment of an enabling environment that will ensure the effective implementation of policies for the protection of woman workers ☯ Increase in women's awareness of their economic rights and opportunities ☯ Strengthening of women's representation in economic decision-making bodies	Increased economic empowerment of women	Gender equality Women's empowerment Sustainable development Peace and social justice Actualization of human potentials beyond basic needs Democratic participation Self-determination at all levels Respect for human rights
☯ Enhancement of women's access to/utilization of basic social services ☯ Promotion of a gender-responsive delivery of justice to violence against women (VAW) survivors ☯ Formulation and implementation of legislative measures that will eliminate gender bias ☯ Promotion and advancement of women and girl-children's human rights	Protection and fulfillment of women's human rights	
☯ GAD mainstreaming in the bureaucracy ☯ Enhancement of women's leadership roles and participation in decision making ☯ Strengthening of women's role in promoting gender-responsive governance ☯ Strengthening of government partnership with media in covering various women's issues	Gender-responsive governance	

Sources: Philippine Plan for Gender-Responsive Development and *Framework Plan for Women.*

"integrated" or "incorporated" in various aspects of the agency's operations, policies, programs, and projects. The Philippine government and its many donors also promote equality between women and men through a "gender mainstreaming" strategy which includes funding initiatives that address women's human rights and gender issues or interventions that enable organizations and institutions to pursue GAD mainstreaming. The *Harmonized Gender and Development Guidelines* presents the convergence of the GAD frameworks of the Philippines and ODA donors.

FEATURES

The guidelines consist of three parts. Part I focuses on a core set of requirements, in the form of questions, that applies to project development in general, regardless of sector or project type. Part II deals with GAD guidelines for the development of certain types of projects, or projects in particular sectors. Part III presents GAD checklists for the management, implementation, and monitoring and evaluation of development projects.

Focus

The guidelines focus on (1) the process, (2) strategies, and (3) the development and management results of integrating gender equality and women's empowerment concerns (see box 2) in various stages of the project cycle, including (a) project identification and design and assessment of projects for funding; (b) project implementation; and (c) monitoring and evaluation. To aid users of the guidelines, a Glossary of Terms is found in appendix A.

Gender equality and women's empowerment are conceived to occur progressively at different levels. Thus, *gender equality and women's empowerment outputs and outcomes* may be viewed and measured in terms of the following indicators:

- Improved physical welfare of women and girls; lower incidence of malnutrition, morbidity, and mortality among girls and boys; lower maternal morbidity and mortality; improved functional literacy of various groups of women, particularly among the older age groups in rural areas and among indigenous peoples groups; and improved school participation of girls and boys at various levels;
- Equal access of women and men to development opportunities (including employment generated by the project), resources, and benefits, which implies the removal of constraints, barriers, and various forms of gender-based discrimination with respect to women's access;
- Greater understanding of women's human rights among women and men; commitment of the State to recognizing, protecting, and fulfilling human rights, particularly of women and girls; or changes in attitudes and beliefs concerning gender relations, as indicated by a reduction in the incidence of violence against women and a more equal gender division of labor;
- Equal participation of women in bodies or organizations created by development programs or projects; and higher representation of women in various decision-making bodies and leadership positions; and
- Equal control of women and men over resources and processes and outcomes of development.

Principles

This set of GAD guidelines subscribes to the idea that development involves the expansion of freedoms and strengthening of capabilities. In this connection, it recognizes that

- equality between women and men is a key women's human right;
- participation in development is crucial to the empowerment of women and men;
- gender equality means promoting the equal participation of women as agents of economic, social, and political change; and
- achieving equality between women and men may involve the introduction of specific measures designed to eliminate prevailing gender inequalities and inequities.

Users

The GAD guidelines are designed for the use of those involved in developing, implementing, managing, and monitoring and evaluating development programs and projects in the Philippines. These are supposed to help NEDA evaluate or assess projects for funding. The guidelines are also expected to assist government agencies and local government units (LGUs) not just in designing but also in implementing, managing, and monitoring and evaluating development interventions. The guidelines are likewise useful to ODA donors and their consultants for developing, managing, and monitoring and evaluating projects. A guide to the administration of the checklists is found in appendix B of this manual.

Box 2. Levels of gender equality and women's empowerment

WELFARE: Addressing the material and physical well-being of women and men, girls and boys. Empowerment here refers to improvement in the physical condition of women and girls.

ACCESS: Ensuring that resources, services, and facilities are made available to women and men. Access is related to the concept of entitlements that are conferred by the state, market, kinship, and other systems. Because women's entitlements are generally more limited, empowerment here means greater access of women to resources, services, and facilities, and making available to women appropriate and effective means to secure resources, services, and facilities.

CONSCIENTIZATION: Challenging the existing gender division of labor or questioning the beliefs that women's lower socioeconomic position and the traditional gender division of labor are part of the *natural order*, or is *"God-given"*; and acknowledging the equality between women and men. Empowerment means sensitizing women and men to sexist beliefs and recognizing that women's subordination is not part of the natural order of things, but is imposed by a system of discrimination that is socially constructed, one that can be altered.

PARTICIPATION: Addressing the most visible and obvious phenomenon of inequality between women and men—small proportions of women are found in the legislative assembly or in the management of public organizations and the private sector. When development is confined to the levels of welfare and access, women are treated as passive beneficiaries. Empowering women means making them equal with men, who are agents actively involved in the development process.

CONTROL: Confronting the unequal power relations between women and men. Women's increased participation at the decision-making level will lead to their increased development and empowerment when this participation is used to achieve increased control over the factors of production, ensuring women's equal access to resources and the distribution of benefits. Equality of control means a balance of power between women and men, so that neither is in a position of dominance.

Source: Sara Longwe, Women's Empowerment and Gender Equality Framework (UNICEF 1994 cited in FPW, pp. 6-7).

Applications

The guidelines apply to all types of programs and projects, supporting:

- the identification and design of projects and programs;
- implementation and management; and
- monitoring and evaluation.

The harmonized GAD guidelines are compatible with the GAD checklists of ODA donors and the GAD strategies of Philippine government agencies. These are formulated as minimum requirements for development projects, including those supported by ODA funds. ODA donors and government agencies may want to introduce additional requirements to fit their priorities and policies.

In accordance with Section 5 of the Implementing Rules and Regulations for RA 7192, government agencies and LGUs are encouraged to prepare and use more detailed checklists to address relevant issues or factors in their regions and sectors. These expanded checklists, however, should observe the core requirements contained in the harmonized GAD guidelines.

Part I. PROGRAM AND PROJECT DEVELOPMENT: GENERAL

The GAD guidelines for the identification and design of development projects and programs require project proponents and evaluators to consider ten core elements of a gender-responsive project or program:

1. participation of women and men in the identification of the development problem;
2. collection and use of sex-disaggregated data in the analysis of the development problem;
3. conduct of gender analysis to identify the gender issues that the proposed project must address;
4. goals, objectives, outcomes, and outputs that include GAD statements that will address the gender issues in (3);
5. activities that respond to the identified gender issues, including constraints to women's participation;
6. conduct of gender analysis of the planned project to anticipate gender-related issues arising from the implementation of the designed project;
7. monitoring indicators and targets which include the reduction of gender gaps or improvement of women's participation;
8. project monitoring and evaluation system that includes a sex-disaggregated database;
9. resources and budgets for the activities in (5); and
10. planned coordination with NCRFW or the agency's GAD plans.

The first three requirements are related to the project identification stage, while the other seven are pertinent to the project design phase.

PROJECT IDENTIFICATION

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

GAD Requirements

The GAD focus areas at this stage of the project or program cycle are:

- *Participation of women and men.* Since development programs and projects address the needs of specific constituencies, the proposed female and male beneficiaries must be

involved at the earliest stage of the project. This will help ensure that their concerns and interests are taken into account in all phases of the project cycle. Major participation concerns are summarized in box 3.

Box 3. Guide questions for participation in project identification

- ☑ Has the project consulted men and women on the problem or issue?
- ☑ Has the project conducted consultations at the central agency, sub-national, or community levels?
- ☑ Have records of the consultations with different parties at various levels been kept? Are these records sex-disaggregated?

- *Collection of sex-disaggregated data and gender-related information, and gender analysis of the development problem and the target population or organization.* Documenting the involvement of men and women in project preparatory activities (identification and design) requires classifying participation data by sex of the participants. Sex-disaggregated data and gender-related information are also necessary inputs to a comprehensive analysis of the situation that includes the gender dimension of the development problem or situation and the existing gender issues. This applies to macro and micro projects or programs.

  The success of the development intervention and the achievement of its goals and objectives are likely to be constrained by a variety of factors, many of which can be avoided or addressed early on before they adversely affect project success. A gender analysis of the development problem can identify gender issues arising from:

  - practical gender needs, or those related to welfare and access concerns (see appendix A for a discussion of key gender analysis concepts);
  - strategic gender needs, or those that correspond with the upper three levels of empowerment and gender equality; and/or
  - gender gaps or inequalities and inequities in gender relations, gender division of labor, access to and control of resources, and involvement in leadership and decision making. Gender gaps originate and are maintained in a society by systems of gender discrimination through cultural norms and traditions, institutions or rules, laws, and religious beliefs.

  General gender analysis questions are provided in box 4. These may be restated to fit the project situation. However, the basic question that all development programs and projects must respond to is: What are the gender issues that the project needs to address in view of its goals and objectives? In addition, they should ask: Which women's human rights are promoted by the programs and projects?

Box 4. Gender analysis guide questions at the project identification stage

Analysis of gender roles, perspectives, and needs

- ☑ What is the division of labor between women and men?
- ☑ What are the practical gender needs of women and men that the project can address?
- ☑ What are the strategic gender needs of women that the project can address?
- ☑ What are the gender gaps or inequalities arising from the existing gender division of labor?

Analysis of access to and control of resources and benefits

- ☑ What resources are available to women and men?
- ☑ What resources do women and have control over?
- ☑ Who has access to and control over the benefits derived from the resources?
- ☑ What are the gender gaps or inequalities arising from the existing resource access and control profile? What contributes to the perpetuation of these gaps? Or, what are the key constraints to women's access to resources and benefits?

Analysis of constraints and opportunities

- ☑ What are the constraints related to women's participation in the project? To attaining the project's gender equality objectives?
- ☑ What are the opportunities related to the achievement of the project's gender equality objectives?

It must be noted that the same questions may be posed for sector or macro situation analysis using aggregate statistics (labor force, employment, credit distribution, education and training, health and nutrition, and the like).

- *Identification of gender issues and women's special needs that must be addressed.* Gender analysis helps proponents identify gender issues and women's special needs that programs or projects must address. The problem of providing pregnant mothers with proper nutrition is part of women's special needs, but this is compounded by a gender issue: Women usually have a small share of the available food within the household. A related issue pertains to the control women actually have over the domestic budget, which includes food. These issues have to be reflected in the summary GAD checklist for project identification (see box 5).

Guide for Accomplishing the Project Identification Checklist

The GAD checklist for project identification contains 3 of the 10 requirements for a gender-responsive project design (see box 5). Project proponents and evaluators of the project proposal must ascertain whether or not each of the requirements has been met and to what degree these have been complied with. There are three possible responses to the question "Has the required activity been done?" These are no, partly, and fully.

Guide for accomplishing box 5

1. Put a check ☑ in the appropriate column (2a to 2c) under "Done?" to signify the degree to which a project proponent has complied with the GAD element: under col. 2a if nothing has been done; under col. 2b if an element, item, or question has been partly complied with; and under col. 2c if an element, item, or question has been fully complied with.

2. A partial and a full yes may be distinguished as follows.

   a. For *Element* 1.0, a "partly yes" to Item 1.1 means meeting with male officials and only a woman or a few women who also happen to be officials in the proponent or partner agency or organization; or with male and female officials and some male beneficiaries. In contrast, full compliance involves meeting with female and male officials and consulting other stakeholders, including women and men that may be affected positively or negatively by the proposed project. A "partly yes" to Item 1.2, on the other hand, means inputs or suggestions may have been sought from woman and man beneficiaries but are not considered at all in designing project activities and facilities.

   b. For *Element* 2.0, "partly yes" means some information has been classified by sex but may not be key to helping identify key gender issues that a planned project must address. In contrast, a full "yes" implies that qualitative and quantitative data are cited in the analysis of the development issue or project.

   c. For *Element* 3.0, a "partly yes" to Item 3.1 means a superficial or partial analysis has been done by focusing on only one or two of the concerns (gender roles, needs, perspectives, or access to and control of resources) while a "partly yes" to Item 3.2 means an analysis of either constraints or opportunities, instead of both, or an analysis of constraints and opportunities only by women or by men, has been done.

3. Enter the appropriate score for an element or item under column 3.

   a. To ascertain the score for a GAD element, a three-point rating scale is provided: "0" when the proponent has not accomplished any of the activities or questions listed under an element or requirement; a score that is less than the stated maximum when compliance is only partial; and "2" (for the element or requirement), or the maximum score for an item or question, when the proponent has done all the required activities.

   b. The scores for "partly yes" differ by element. For instance, the score for "partly yes" for sex-disaggregated data in project identification and planning (Element 2.0) is "1." For elements that have two or more items or questions (such as Elements 1.0 and 3.0), the rating for a "partial yes" is the sum of the scores of the items or questions that falls short of the maximum "2.0."

   c. Because Elements 1.0 and 3.0 have been broken down into two items each, the maximum point (full "yes") for each item is pegged at "1.0" and that for "partly yes" is "0.5." The score for the element will be a positive number that is lower than "2.0," the maximum score for the element.

4. For an element (col. 1) that has more than one item or question, add the score for the items and enter the sum in the thickly bordered cell for the element.

5. Add the scores in the thickly bordered cells under column 3 to come up with the GAD score for the project identification stage.

6. Under the last column, indicate the key gender issues identified (for proponents) or comments on the proponent's compliance with the requirement (for evaluators).

Box 5. GAD checklist for project identification

Element and item/question (col. 1)	Done? (col. 2)			Score for an item/ element* (col. 3)	Gender issues identified (col. 4)
	No (2a)	Partly (2b)	Yes (2c)		
1.0 Involvement of women and men (max score: 2; for each item, 1)					
1.1 Participation of women and men in beneficiary groups in problem identification (possible scores: 0, 0.5, 1.0)					
1.2 Participation of women and men in beneficiary groups in project design (possible scores: 0, 0.5, 1.0)					
2.0 Collection of sex-disaggregated data and gender-related information (possible scores: 0, 1.0, 2.0)					
3.0 Conduct of gender analysis and identification of gender issues (max score: 2; for each item, 1)					
3.1 Analysis of gender gaps and inequalities related to gender roles, perspectives and needs, or access to and control of resources (possible scores: 0, 0.5, 1.0)					
3.2 Analysis of constraints and opportunities related to women and men's participation in the project (possible scores: 0, 0.5, 1.0)					
TOTAL GAD SCORE—PROJECT IDENTIFICATION STAGE					

*For elements with multiple questions, the possible responses and their corresponding scores are as follows: no, with a score of "0"; yes, with a score of "2"; and partly yes. The score for "partly yes" to an item or question varies per element, while the total score for "partly yes" to an element may be any positive score lower than "2."

PROJECT DESIGN AND FORMULATION

A gender-responsive design addresses gender equality issues that have been identified in a gender analysis of the development problem and issues related to project management, processes, outputs, and outcomes.

GAD Requirements

In the design phase, the GAD areas of concern are as follows:

- *Articulation of a woman's human right or a gender equality goal, purpose, or objective.* A gender equality objective may be incorporated as part of project objectives or organizational goals to ensure that the project will address gender issues and the constraints that have been identified in the situation analysis ("Issues" column in box 5). Following the PPGD, the GAD objective may be gender equality in the control of resources, as it enables women to gain increased access to resources and, consequently, improved welfare for themselves and their children. Welfare and access goals are important, but it is crucial to recognize that equality of participation and control is the necessary condition if progress toward gender equality in welfare and access provisions is to be achieved.

  The following questions may be asked:

  - Do the project purposes incorporate gender equality and women's empowerment?
  - Do the project objectives include gender equality and women's empowerment?
  - Are the GAD goals of the project attainable within the project time frame and budget?

- *Inclusion of gender equality and women's rights outputs and outcomes.* The outputs and outcomes may be institutional or organizational changes, particularly in programs or projects that seek to mainstream GAD. Outputs may also relate to improvements in the situation or status of women and men. The PPGD gender equality and women's empowerment framework is a good guide for formulating outputs and outcomes (box 2, above). For instance, the output may be improved access of women to resources distributed by the project while the outcome may be more women-led enterprises that are sustainable, highly valued, and within nontraditional areas for women.

- *Support for gender-responsive activities or interventions.* Gender-responsive projects and programs address relevant gender issues and achieve their gender equality goals, objectives, or purposes by:

  - supporting activities or interventions that directly reduce gender gaps and inequalities;
  - building capabilities, particularly for vulnerable or marginalized women, and fully utilizing the skills and knowledge of both women and men;
  - including strategies that address constraints to women's participation or the attainment of the project's gender equality goals, purposes, and objectives;

- ensuring that activities and strategies do not create a negative impact on women's status and welfare; and
- creating a project management environment that is committed to and competent in pursuing gender equality in the project.

- *Review of the final project design using a gender analysis.* After the project design has been completed, a gender analysis must be conducted to ensure that the activities and strategies are congruent with the gender equality goals and the results that the project is supposed to attain, and that the project will not create gender inequalities or adversely affect women and girls. Some questions to be addressed are:

  - Will the activities or interventions reduce gender gaps and inequalities?
    - Does the project challenge existing gender division of labor, responsibilities, and relations?
    - Will the project provide women and men with opportunities for new gender roles?
    - Will the project enable women to have equal access to resources and benefits?
  - Will the project build capabilities, particularly among women, and fully utilize the skills and knowledge of both women and men?
  - Does the project include strategies that will reduce or remove constraints to women's participation or the attainment of the project's gender equality goals, purposes, and objectives? Specifically, will the project encourage and enable women to participate in the project despite their traditionally more domestic location and subordinate position?
  - Has the project considered its long-term impact on women's increased ability to take charge of their own lives, including their capacity to take collective action to solve problems?
  - How will the project avoid negative impacts on women's status and welfare?

- *Inclusion of monitoring targets and indicators.* The inclusion of GAD activities, outputs, and outcomes calls for the commitment of project resources to eradicate gender discrimination or improve women's situation and status. To ensure this, projects need to set targets and monitor project progress and accomplishments. This means:

  - setting realistic time-bound quantitative and qualitative targets that signify concrete results of the project's commitment to gender equality and GAD goals;
  - choosing gender equality and women's empowerment indicators that will measure the GAD results at output and outcome levels; and
  - requiring the collection of sex-disaggregated data and gender-related information to support the project's GAD monitoring.

- *Commitment of resources to activities and interventions that will enable the project to promote gender equality and women's empowerment.* The effectiveness of project activities is often hampered by the amount of resources (financial and human) that a project is willing to commit to achieving GAD goals. The inclusion of gender equality goals, results, and

targets generally requires making sufficient resources available to attain gender equality and women's empowerment through project intervention.

- *Congruence of the GAD agenda of the project with that of the Philippine government.* Many government departments, bureaus, and offices have GAD strategies and action plans that, with NCRFW, promote the government's GAD agenda. Several agencies have developed their GAD strategies or action plans. Because programs and projects are finite, the sustainability of GAD-related initiatives partly depends on how well the change agenda have been harmonized with NCRFW programs and incorporated in the GAD strategy of the implementing government agency or unit. In situations where a proposed project or program is lodged in an agency that has no GAD structure, mechanism, or strategy, the project may consider its initiatives as opportunities for promoting GAD within the agency or unit. Specifically, the following questions may be asked:

  - Has the project design considered the GAD initiatives and structures of the partner Philippine government agency? Or, has the project involved GAD focal points in the design of its gender equality strategies? Or, does the project have a strategy or plan for coordinating with NCRFW? Or, will the project build on the agency/NCRFW/ government's commitment to the empowerment of women?
  - Does the project have an exit plan that will ensure the sustainability of GAD efforts and benefits?
  - Are other groups involved in addressing gender issues in the sector? Will the project build on the initiatives or actions of other organizations in the area?

The project logical framework analysis (LFA or logframe) or a similar tool must reflect GAD concerns. Thus, project design must be assessed in line with the various elements of the logical framework analysis: project goals or objectives, outcomes and outputs (particularly in terms of results), and monitoring targets and indicators. To ensure that all this happens, box 5a provides examples of key questions to be asked in preparing a logical framework analysis.

Box 5a. Suggested key questions for engendering the logical framework analysis*

Narrative summary	Objectively verifiable indicators	Means of verification	Important assumptions or risk factors
Overall Objective or Long-term Goal ▪ Are women or girls specified as among the clients, targets, or beneficiaries who will *gain* in terms of improved status or material condition (life outcome) or enhanced participation in the long-term benefits of the project? OR ▪ Do gender relations in any way influence the project goal, including the distribution of benefits?	What measures can verify achievement of the gender-conscious goal within a given time frame and specific location?	▪ Are the data for verifying the goal classified by sex and analyzed in terms of gender? ▪ What gender analysis tools will be used?	What are the important external factors necessary in sustaining the gender-conscious goal?

Box 5a. (cont.)

Narrative summary	Objectively verifiable indicators	Means of verification	Important assumptions or risk factors
Project Purpose (or Specific Objectives or Outcomes) ▪ Does the project have gender-responsive objectives? ▪ Does the project enable women and men, girls and boys, to utilize their enhanced capacities or the resources they received from the project?	▪ What measures can verify the achievement of gender-responsive objectives or of objectives in connection with women and men, girls and boys? OR ▪ How will utilization of the goods and services by women and men, girls and boys, affect their activities, practices, and behavior?	▪ Are the data for verifying the project purpose sex-disaggregated and analyzed in terms of gender? ▪ What gender analysis tools will be used?	What are the important external factors necessary in sustaining the gender-responsive objective(s)?
Outputs ▪ Is the distribution of goods and services equally or equitably accessible to women and men, girls and boys? ▪ Do the project deliverables address gender issues that are directly relevant to the project?	What measures can verify that project deliverables (enhanced capacities, health services, etc.) are accessible to women as well as men, girls as well as boys, and different types of women/girls?	▪ Are the data for verifying project outputs classified by sex and analyzed in terms of gender? ▪ What gender analysis tools will be used?	What are the important external factors necessary in achieving project outputs, particularly in connection with marginalized women?
Activities ▪ Are gender issues clarified in the implementation of the project? ▪ Are project activities designed to enable women and men, girls and boys, to participate in the activities or share in the benefits? ▪ Do the project activities build the capacity of the staff to conduct gender analysis and monitor or review project progress vis-à-vis gender concerns or issues?	**Inputs:** ▪ What resources do project beneficiaries contribute to the project? ▪ Is the contribution of women as well as men accounted for? ▪ Do external resources account for women's access to and control over resources? ▪ Has the project allocated a budget for building the capacity of the project staff to implement the project in a gender-responsive way?	▪ Are the data for verifying project activities sex-disaggregated and analyzed in terms of gender? ▪ What gender analysis tools will be used?	What are the important external factors necessary in achieving the activities and especially in ensuring the continued involvement of man and woman participants in the project?

*The questions are enhanced versions of the questions used by the International Service for National Agricultural Research (ISNAR), 2000. after the questions have been aligned with the NEDA logical framework analysis methodology.

Guide for Accomplishing the Project Design Checklist

Box 6 includes the other seven core requirements of a gender-responsive project; sector-specific guide questions are provided in Part II of these harmonized guidelines. The instructions below serve as a guide for project designers and evaluators.

Guide for project designers and evaluators

1. Put a check ☑ in the appropriate column (2a to 2c) under "Done?" to signify the degree to which a project proponent has complied with the GAD element: under col. 2a if nothing has been done; under col. 2b if an element, item, or question has been partly complied with; and under col. 2c if an element, item, or question has been fully complied with.

2. A partial and a full yes may be distinguished as follows.

   a. For *Element 4.0*, "partly yes" means having a gender equality statement incorporated in any of the following levels: goal, purpose, or output. A full "yes" requires the integration of gender equality in at least two of the three levels.

   b. For *Element 5.0*, "partly yes" means having gender equality strategies or activities but no stated gender issues that will match the activities, while a full "yes" requires an identified gender issue and activities seeking to address this issue.

   c. For *Element 6.0*, a "partly yes" to Item 6.1 means women or girls comprise less than a third of the project's indirect or direct beneficiaries; to Item 6.2 means the project focuses on affecting socioeconomic status with no consideration of women's empowerment; and to Item 6.3 means mitigating strategies deal only with minimizing negative impact on welfare, with no regard for status. A full "yes" to an item under Element 6.0 means women or girls constitute at least a third of the project beneficiaries (Item 6.1), the project will impact on both material condition and status (6.2), and the project seeks to minimize negative impact on women's status as well as welfare (6.3).

   d. For *Element 7.0*, "partly yes" means the project monitoring plan includes indicators that are sex-disaggregated but no qualitative indicator of empowerment or status change.

   e. For *Element 8.0*, "partly yes" means the project requires the collection of some sex-disaggregated data or information, but not all the information will track the gender-differentiated effects of the project. A full "yes" means all sex-disaggregated data and qualitative information will be collected to help monitor the GAD outcomes and outputs.

   f. For *Element 9.0*, "partly yes" means there is a budget for GAD-related activities but not sufficient to ensure that the project will address relevant gender issues (9.1), or to build GAD capacities among project staff or the project agency or to tap external GAD expertise (9.2).

   g. For *Element 10.0*, a "partly yes" response to Item 10.1 means there is a mention of the agency's GAD plan but no direct connection is made to incorporate the project's GAD efforts into the plan; to Item 10.2 means there is a mention of other GAD initiatives in the project coverage but no indication of how the project will build on these initiatives; and to Item 10.3 means the project has a sustainability plan for its GAD efforts but no mention is made of how these may be institutionalized within the implementing agency or its partners.

3. After ascertaining whether a GAD requirement has been done or not, enter the appropriate score for an element or item under column 3.

   a. To ascertain the score for a GAD element, a three-point rating scale is provided: "0" when the proponent has not accomplished any of the activities or questions listed under an element or requirement; a score that is less than the stated maximum when the proponent has achieved partial compliance; and "2" (for the element or requirement), or the maximum score for an item or question, when the proponent has done all the required activities.

   b. The scores for "partly yes" differ by element. For instance, the score for "partly yes" for Elements 4.0, 5.0, 7.0, and 8.0 is "1." For elements that have two or more items or questions (such as Element 6.0), the rating for a "partial yes" is the sum of the scores of the items or questions which falls short of the maximum "2.0."

c. For Element 9.0, which has two items (9.1 and 9.2), the maximum score for each item is pegged at "1.0" and for "partly yes" is "0.5." Hence, if a project scores a full "1.0" in one question but "0" in the other, or if a project scores "partly yes" (or "0.5") in each of the two items, the total rating for the element will be "partly yes" with a score of "1.0." If a project scores "partly yes" ("0.5") in one item but no ("0") in the other, the total rating for the element will be "0.5."

d. For Elements 6.0 and 10.0, which have three items each, the maximum score for each item is pegged at "0.67" and for "partly yes" is "0.33." The rating for the element will be "partly yes" if the total score of the three items is positive but less than "2.0," the maximum for the element.

4. For an element (col. 1) that has more than one item or question, add the score for the items and enter the sum in the thickly bordered cell for the element.

5. Add the scores in the thickly bordered cells under column 3 to come up with the GAD score for the project design stage.

6. Under the last column, indicate the key gender issues identified (for proponents) or comments on the proponent's compliance with the requirement (for evaluators).

Box 6. GAD checklist for designing projects

Element and guide questions (col. 1)	Done? (col. 2)			Score for item/ element* (col. 3)	Results or comments (col. 4)
	No (2a)	Partly (2b)	Yes (2c)		
4.0 ***Gender equality goals, outcomes, and outputs*** (possible scores: 0, 1.0, 2.0) Does the project have clearly stated gender equality goals, objectives, outcomes, or outputs?					
5.0 ***Matching of strategies with gender issues*** (possible scores: 0, 1.0, 2.0) Do the strategies and activities match the gender issues and gender equality goals identified?					
6.0 ***Gender analysis of likely impacts of the project*** (max score: 2; for each item or question, 0.67)					
6.1 Are women and girl children among the direct or indirect beneficiaries? (possible scores: 0, 0.33, 0.67)					
6.2 Has the project considered its long-term impact on women's socioeconomic status and empowerment? (possible scores: 0, 0.33, 0.67)					
6.3 Has the project included strategies for avoiding or minimizing negative impact on women's status and welfare? (possible scores: 0, 0.33, 0.67)					

Element and guide questions (col. 1)	Done? (col. 2)			Score for item/ element* (col. 3)	Results or comments (col. 4)
	No (2a)	Partly (2b)	Yes (2c)		
7.0 ***Monitoring targets and indicators*** (possible scores: 0, 1.0, 2.0) Does the project include gender equality targets and indicators to measure gender equality outputs and outcomes?					
8.0 ***Sex-disaggregated database requirement*** (possible scores: 0, 1.0, 2.0) Does the project M&E system require the collection of sex-disaggregated data?					
9.0 ***Resources*** (max score: 2; for each question, 1)					
9.1 Is the project's budget allotment sufficient for gender equality promotion or integration? OR, will the project tap counterpart funds from LGUs/partners for its GAD efforts? (possible scores: 0, 0.5, 1.0)					
9.2 Does the project have the expertise in promoting gender equality and women's empowerment? OR, does the project commit itself to investing project staff time in building capacities within the project to integrate GAD or promote gender equality? (possible scores: 0, 0.5, 1.0)					
10.0 ***Relationship with the agency's GAD efforts*** (max score: 2; for each question or item, 0.67)					
10.1 Will the project build on or strengthen the agency/NCRFW/government's commitment to the empowerment of women? (possible scores: 0, 0.33, 0.67) IF THE AGENCY HAS NO GAD PLAN: Will the project help in the formulation of the implementing agency's GAD plan?					
10.2 Will the project build on the initiatives or actions of other organizations in the area? (possible scores: 0, 0.33, 0.67)					
10.3 Does the project have an exit plan that will ensure the sustainability of GAD efforts and benefits? (possible scores: 0, 0.33, 0.67)					
TOTAL GAD SCORE—PROJECT DESIGN STAGE					

*The possible responses and their corresponding scores are as follows: **no** ("0"), **yes** ("2"), and **partly yes**. For elements with multiple items or questions, the score for "partly yes" to an item or question varies per element; the total score for "partly yes" to an element is a positive number that is lower than "2.0."

INVESTMENT PROGRAM FORMULATION

At NEDA, the formulation of an investment plan serves as an intermediate stage between program or project development and project evaluation. Generally, this involves the following activities:

- Analysis of investment gaps and preferred sector/regional areas of public investment
- Determining the nature and size of several programs and projects to address investment gaps and achieve a given set of goals, and identify program subsector activities (PSAs)
- Scheduling of investment program/project implementation, taking into account available resources
- Planning and financing of the investment plan by devising strategies to generate resources both from domestic and foreign sources

Several GAD-related issues need to be considered when formulating the investment plan. In *selecting and screening programs and projects*, the following must be done:

- Inclusion of gender-responsive priority capital forming and technical assistance projects as provided for by RA 7192
- Use of gender-responsive prioritization criteria, such as:
  - promotion of gender equality and women's empowerment in the areas of access to and control of resources and benefits among women and men;
  - strengthening of women's and men's participation in their own organizations and in development activities; and
  - utilization of structures and mechanisms for integrating GAD concerns.

In connection with *financing programs and projects,* at least the following must be considered: (1) conferring priority to gender-responsive projects, as provided for by the Implementing Rules and Regulations of RA 7192; and (2) monitoring the utilization and mobilization of domestic and foreign resources for gender-responsive projects and programs.

EVALUATION OF PROPOSED PROJECTS

The assessment of a proposed project involves an analysis of its technical, financial, economic, social, and operational viability. It likewise includes the determination of its potential impact on the target area or beneficiaries. In evaluating proposed projects and in ensuring that they are gender-responsive, there are two minimum requirements:

- **Relevant gender issues have been identified.**
- **The identified gender issues have been addressed in the project design.**

The core GAD requirements or elements for the identification, design, and evaluation of a proposed project are summarized in box 7. The scores are carried over from boxes 5 and 6, or the relevant checklist from Part II of these harmonized guidelines. A proposed project is expected to get at least a "1" for each element, but preferably at least a "2" each for gender analysis (Elements 3.0 and 6.0) and collection of sex-disaggregated data (Elements 2.0, 7.0, and 8.0). The last column indicates the results that are expected to be achieved once the requirement is met. The evaluator may also use this column for his or her comments on the quality of the project's compliance with a particular core element or requirement.

Box 7. Summary checklist for the assessment of proposed projects

Element or requirement	Scores carried over			Result
	No	Partly yes*	Yes	
From Box 5 (p. 11) or sector-specific checklist				
1. Involvement of women and men in project conceptualization and design (max score: 2)				(Inputs to project design)
2. Collection of sex-disaggregated data and gender-related information at the planning stage (max score: 2)				(Data available for identifying gender issues)
3. Conduct of gender analysis and identification of gender issues at the project identification stage (max score: 2)				(Gender issues identified before project design)
From Box 6 (pp. 18-19) or sector-specific checklist				
4. Presence of gender equality goals, outcomes, and outputs (max score: 2)				(Articulation of project goals or objectives, activities, analysis of likely gender impact of the project, monitoring of targets and indicators, and sex-disaggregated data requirement)
5. Presence of activities and interventions that match the gender issues identified to produce gender equality outputs and outcomes (max score: 2)				
6. Gender analysis of the likely impact of the designed project				
7. Presence of monitoring targets and indicators (max score: 2)				
8. Provision for the collection of sex-disaggregated data in the M&E plan (max score: 2)				

Element or requirement	Scores carried over			Result
	No	Partly yes*	Yes	
9. Commitment of resources for addressing gender issues (max score: 2)				(Budget allocation to promote gender equality and women's empowerment)
10. Inclusion of plans to coordinate/relate with the agency's GAD efforts (max score: 2)				(Indication of coherence of the project's GAD plan with the agency's)
TOTAL GAD SCORE—PROJECT IDENTIFICATION AND DESIGN STAGES				

*As evident from the scores in boxes 5 and 6 and the sector-specific checklists, the summary score for "partly yes" to an element or requirement may be any positive number lower than "2.0."

Interpretation of the GAD score

0-3.9 GAD is invisible in the project (proposal is returned).

4.0-7.9 Proposed project has promising GAD prospects (proposal earns a "conditional pass," pending identification of gender issues and the strategies and activities to address these, and inclusion of the collection of sex-disaggregated data in the monitoring and evaluation plan).

8.0-14.9 Proposed project is gender-sensitive (proposal passes the GAD test).

15.0-20.0 Proposed project is gender-responsive (proponent is commended).

Part II. INTRODUCTION TO PROGRAM AND PROJECT DEVELOPMENT: SPECIFIC SECTORS

To further guide designers and evaluators of development programs and projects, this section offers GAD checklists for various sectors: agriculture and natural resources, infrastructure, private sector development, and social (education, health, housing and settlement, and areas of armed conflict). Added to these are three new checklists for the justice, ICT, and microfinance sectors. The sector and subsector checklists are found in separate pullouts.

As with the general checklist, the guidelines for a sector or subsector aim to ensure that the project:

- is consistent with the sector thrusts and its implementation is within the mandate of the proponent or implementing agency, the objectives and thrusts of the PPGD, and the priorities of the PPGD medium-term plans;
- includes gender analysis to identify the gender issues it needs to consider, and to ascertain its likely gender impact;
- specifies relevant gender equality and women's empowerment objectives, outcomes, and outputs;
- includes activities or strategies intended to address the identified gender issues or needs, or enable the project to achieve gender equality results;
- commits human and financial resources (such as hiring a GAD specialist, providing project personnel and partners with GAD training during project implementation, and developing a gender database) to achieve its gender equality and women's empowerment goals;
- has a gender-sensitive monitoring and evaluation system that specifies gender equality indicators and targets and the collection of sex-disaggregated and gender information; and
- coordinates its efforts with those of NCRFW, the local implementing agency, and other groups working to address the gender issues in the sector.

It must be noted that in identifying and addressing gender issues, project designers and evaluators must be sensitive to the different socioeconomic variations among women. Some women may experience different forms of exclusion because of their resource position, ethnicity, or disability. Gender-related norms and attitudes also differ among the Philippine ethnolinguistic groups and indigenous peoples. The differences among women, as between women and men, must be considered in program or project design, implementation, and monitoring and evaluation.

Part III. INTRODUCTION TO PROGRAM AND PROJECT IMPLEMENTATION, MANAGEMENT, AND MONITORING AND EVALUATION

At the implementation stage of a project, the executing agency or the project management office (PMO) holds the key to the achievement of GAD or gender equality results, since it interprets and implements the project's gender equality strategies and plans. However, programs and projects have a finite life. The sustainability of changes that they introduce or foster generally depends on how well the change agenda have been incorporated in the mainstream concerns of the government agency, office, or unit, and on what capacities have been developed within the agency to manage the change.

In connection with project management, two sets of concerns must be addressed. The first pertains to GAD mainstreaming, such as (1) support of project leadership, (2) staff commitment to and technical competence in implementing the project's GAD strategy and willingness to tap external GAD expertise in developing internal GAD capacity, and (3) enforcement of procedures and processes that promote gender equality and women's empowerment.

The second set of concerns seeks to ensure post-project sustainability of GAD initiatives and results by (1) involving regular agency personnel in the implementation of gender equality activities, (2) developing the capacity of agency officials and personnel for undertaking GAD initiatives, and (3) incorporating the project's GAD strategies in the agency's GAD plans.

Apart from checking on project management, the progress and performance of projects is periodically assessed as part of project monitoring. Meanwhile, project evaluation generally takes place at the end of the project, although a midterm evaluation is generally conducted in projects that run for three years or more. Monitoring and evaluation aims to ascertain the project's success in achieving its targets and goals, assess practices and processes, and cull important lessons from the experiences and problems encountered by the project. A menu of sample GAD monitoring indicators is provided in appendix C. Like the specific sectors, the GAD checklists for project management and monitoring and evaluation are found in separate pullouts.

Appendix A: Key GAD Concepts

Access and control: Being able to avail oneself of, or to utilize, a particular resource (access); the power or authority to decide on the acquisition, use, allocation, and disposal of a resource or benefit (control).

Benefits: Income, food, social status, and other results of human activities and development efforts.

Gender: A shortcut of the phrase, "social relations of gender," which seeks to make evident and to explain the global asymmetry that appears in male–female relations in terms of power sharing, decision making, division of labor, and return to labor both within the household and in society. It directs our attention to all the attributes acquired in the process of socialization: notions of self; group definitions; sense of appropriate roles, values, and behaviors; and expected interactions in relationships between women and men. In the Philippines, as in most societies, women as a group have less access to resources, opportunities, and decision making. These asymmetries and inequalities limit their ability to develop and exercise their full capabilities for their own benefit and for the benefit of society as a whole.

Gender analysis: An examination of a problem or situation in order to identify gender issues within the problem/context of a project, and the obstacles to the attainment of gender equality or similar goals. Gender issues may be addressed in all aspects of the program, project, or organization. This commitment is reflected in the incorporation of GAD goals as well as in the choice of intervention strategy.

Gender discrimination: Differential treatment given to individuals on the basis of their gender. This generally involves systemic and structural bias against women in the distribution of income, access to resources, and participation in decision making.

Gender issue: Arises when gender inequality is recognized as undesirable or unjust.

Gender needs and interests: May be classified into practical and strategic, in the context of women's empowerment.

- *Practical gender needs:* Those that do not challenge the unequal structure of gender relations, division of labor, or traditional balance of power, but relate to the sphere in which women have primary responsibilities. These differ from "women's special needs" but may sometimes arise from them. Some examples are need for income to send children to school, weeding tools for agricultural work, and potable water.
- *Strategic gender interests:* Those that arise from an understanding (consciousness) and analysis of women's subordinate situation in society. These are the actions and strategies required to bring about structural changes and empowerment. Examples include political and legislative reform to grant constitutional equality to women, state accession to the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), a political voice, and action on violence against women.

Gender roles: Those roles a society or culture defines or constructs as female or male. An example is childrearing, which is classified as a female gender role. It is not a female sex role, as childrearing can be done by men as well as by women. Gender roles may be generally classified into:

- *Production,* which consists of activities that result in the generation or production of marketable goods or services. These include crop production, fisheries, animal raising, and wage employment.
- *Reproduction,* which covers activities carried out to reproduce labor and to care for and maintain the household. Examples are childcare, food preparation, and other activities that generate goods and services for immediate household consumption.
- *Community management,* which pertains to roles or activities that produce results for the community's collective consumption, use, or benefit. Examples are mobilizing resources to secure basic services for the community, taking on leadership roles, and participating in projects and organizations.
- *Leisure,* which refers to activities that do not pertain to productive or reproductive work but are instead related to rest and recreation.

Resources: Anything that people need to carry out their activities. More specifically, it may be understood as anything that produces a stream of income and other benefits.

Sex roles: Occupation or biological function for which a necessary qualification is to belong to one particular sex category. An example is pregnancy as a female sex role, since only members of the female sex can bear children.

Appendix B: Administration of the GAD Checklists

This appendix has three parts. The first is intended to help project proponents comply with the GAD checklist for project design. It may also be a useful reference for evaluators of project proposals. The second and third parts are meant to assist project monitors and evaluators in their assessment of the gender responsiveness of the project in the implementation and monitoring and evaluation phases, respectively.

Part I: PROJECT DESIGN CHECKLIST

Element or requirement	Methods and sources of information
1. Involvement of women and men in project conceptualization and design	Conduct stakeholder consultations with woman and man stakeholders
2. Collection of sex-disaggregated data and gender-related information at the planning stage	Analyze secondary sources that report sex-disaggregated data; review relevant gender-related studies done in the sector or area. IF NO SECONDARY SOURCES ARE AVAILABLE: collect primary data related to gender roles and access to and control of resources using small-sample surveys or participatory rural appraisal (PRA) methods
3. Conduct of gender analysis and identification of gender issues at the project identification stage	Analyze gender gaps using the gender equality and women's empowerment framework; activity, resource access, and constraints and opportunities profiles; and socioeconomic and gender analysis
4. Presence of gender equality goals, outcomes, and outputs	Formulate logical framework analysis (LFA or logframe) statements based on PPGD goals and strategies (box 1, page 3), levels of gender equality and women's empowerment (box 2, page 5), and the examples in the sector checklists. Box 5a provides guide questions for integrating GAD in the logframe.
5. Presence of activities and interventions that match the gender issues identified to produce gender equality outputs and outcomes	Consider gender issues identified in requirement (3) when formulating activities and interventions; assess whether the activities will produce the expected gender equality outputs and outcomes with the help of requirement (6)
6. Conduct of gender analysis of the likely impact of the designed project	Use gender analysis methods in (3) and assess the designed project in terms of whether it will create instead of reduce or eliminate gender gaps, or create rather than mitigate constraints to the participation of women and men in project activities and benefits.
7. Presence of monitoring targets and indicators	Set monitoring targets in terms of the gender objectives of reducing gender gaps or creating increased opportunities for women to participate in the project
8. Provision for the collection of sex-disaggregated data in the M& E plan	Include sex-disaggregated monitoring indicators and require the collection and establishment of sex-disaggregated database as part of the M&E plan
9. Commitment of resources to addressing gender issues	Include budget allocation for GAD activities or inputs that will facilitate integration of GAD in the project
10. Inclusion of plans to coordinate/relate with the agency's GAD efforts	Review the GAD efforts of the implementing agency; coordinate with GAD focal points in the formulation of the project's GAD strategy

Part II: PROJECT MANAGEMENT AND IMPLEMENTATION CHECKLIST

Element or requirement	Methods and sources of information
1.0 ***Supportive project management***	
1.1 Supportive project leadership (project steering/advisory committee or management)	• Interview project leaders and managers • Analyze project policy documents and minutes of committee meetings • Interview GAD focal persons and GAD consultants
1.2 Availability of adequate gender expertise throughout the project	Review job descriptions, terms of references (TORs), and curriculum vitae of project managers, staff, and consultants
2.0 ***Technically competent staff or consultants***	
2.1 Technical preparation of project staff members for promoting gender equality or integrating GAD; or assignment of an individual or group responsible for promoting gender equality in the project; or hiring of local GAD experts	• Review curriculum vitae of project managers, staff, and consultants, and the list of project consultants • Hold a focus group discussion (FGD) to gauge project staff's self-assessment of their preparedness for GAD work • Interview project managers, GAD focal persons, and consultants • Review reports prepared by the staff
2.2 Presence of women and men in the project implementation team	• Review TORs and staff complement of the project • Discuss gender balance in project team during the FGD in 2.1
2.3 Requirement that its M&E teams (personnel or consultants) have technical competence in GAD evaluation	• Review TORs and curriculum vitae of members of M&E teams • Interview project staff and a sample group of beneficiary population re GAD coverage by M&E teams or consultants
3.0 ***Committed Philippine government agency***	
3.1 Involvement of regular agency personnel in implementing project GAD initiatives or in project-sponsored GAD training	• Review several documentation of GAD training sponsored by the project • Interview agency personnel involved in the project
3.2 Agency's integration of the project GAD efforts in its GAD action plans	Review documentation/reports on the GAD strategy and efforts of the project, and compare these with the agency's GAD plans
4.0 ***GAD implementation processes and procedures***	
4.1 Incorporation of a discussion of GAD concerns in project documents; requirement for subproject proposals re GAD objectives and gender analysis	• Review a sample of project documents, reports, and publications for GAD contents or messages • Review project criteria and instructions for subprojects
4.2 Presence of an operational GAD strategy; effectiveness in integrating GAD	• Check GAD strategy of the project against accomplishment reports • Interview GAD focal persons/consultants and other staff
4.3 Budget for activities that will build capacities for doing GAD tasks (gender analysis, monitoring, etc.)	• Review the project budget allocations for GAD • Check actual expenditures on GAD capacity building and activities
4.4 Involvement of women and men in various phases of the subprojects	Visit a sample of project sites; hold FGDs or interviews with key woman and man informants re how the project had involved women and men

Part III. PROJECT MONITORING AND EVALUATION CHECKLIST

Element and guide question	Methods and sources of information
1.0 ***Project monitoring system including indicators that measure gender differences in outputs, results, and outcomes***	
1.1 Requirement for gender-sensitive outputs and outcomes	Check the logical framework analysis, or logframe
1.2 Use of GAD or gender equality indicators in monitoring activities, inputs, outputs, and results	Check the project M&E plan against the actual monitoring indicators being used
2.0 ***Project database including sex-disaggregated and gender-related information***	
2.1 Support for studies to assess gender issues and impact; collection of sex-disaggregated data on the project's impact on women and men in connection with welfare, access to resources and benefits, awareness or consciousness raising, participation, and control	• Review the list of studies supported by the project and completed research reports • Review documentation of project database and reports generated by the database • Interview project managers and staff re usefulness of GAD studies and database
2.2 Collection of sex disaggregated data on the distribution of project resources to women and men, and on the participation of women and men in project activities and in decision making; requirement for subprojects to include sex-disaggregated data in their reports	• Review the list of studies supported by the project and completed research reports • Review reports submitted by subprojects and check whether these contain or refer to sex-disaggregated and gender information • Interview M&E staff re problems met in the collection and use of sex-disaggregated data
2.3 Inclusion of project and subproject reports containing sex-disaggregated data, gender equality or GAD concerns, initiatives, and results	• Review project and subproject reports for GAD contents
2.4 Whether or not sex-disaggregated data are being "rolled up" from the field to the national level	• Check project GAD database against the data being reported and used at the national level
3.0 ***Gender equality and women's empowerment targets being met***	• Ask a sample of woman beneficiaries re their assessment of changes in their welfare and status • Review reports or interview project staff
3.1 Improvement in women's welfare and status been improved as a result of the project	
3.2 Enhancement of the implementing agency's capacity to implement gender-sensitive projects	• Ask relevant agency officials and GAD focal persons re project effect on their capacity to implement gender-sensitive projects • Review evidence of enhanced capacity
4.0 ***Project addressing gender issues that arise during or from its implementation***	• Interview project managers and staff, including GAD focal persons and consultants

Element and guide question	Methods and sources of information
5.0 *Participatory monitoring and evaluation processes*	
5.1 Involvement/consultation with woman and man implementors as well as beneficiaries during project monitoring and evaluation	• Review documentation of M&E visits for people met and consulted • Review M&E reports • Hold an FGD with a sample of woman and man beneficiaries
5.2 Involvement/consultation with women and men in assessing the gender impact of the project	

Appendix C: Sample Sector-specific GAD Monitoring Indicators

NOTE: *The sample indicators below refer to development indicators that correspond to the gender equality results identified in the corresponding section of Part II of the original harmonized guidelines.* ***Project management indicators are found in boxes 16 and 17.*** *For the new checklists (justice, ICT, and microfinance), see relevant pullouts of the revised harmonized guidelines.*

AGRICULTURAL AND RURAL DEVELOPMENT

- Adoption rates of technology by women/men
  - Proportion of woman farmers who are adopting new technologies or crops
- Organizational membership, by sex of members
  - Proportion of women to total members of farmers' organizations
  - Percentage change in the membership of rural women's organizations
- Organizational leadership, by sex of leaders or officials
  - Proportion of women to total leaders of farmers' organizations
- Participation in training and project activities, by type of training or activity and by sex
  - Proportion of women to total training participants, by type of training or activity
  - Proportion of women to total participants in non-home management agricultural training
  - Proportion of men to total participants in home management training
- Access of women/men to project resources (animals, seeds or planting materials, credit)
  - Proportion of women to total recipients of inputs
  - Percentage change in the number of woman recipients of inputs
  - Proportion of inputs going to woman beneficiaries
  - Percentage change in the amount of inputs going to woman beneficiaries
  - Proportion of women to total recipients of land titles
  - Percentage change in the number of woman recipients of land titles
  - Proportion of women to total workers employed by the project
  - Rural employment rate, by sex of workers
- Productivity of female/male farmers, by crop or agricultural activity
  - Average crop yield, by sex of farmer-operator
  - Average agricultural production, by sex of operator
- Control over agricultural decision-making
  - Inputs of women/men to agricultural decision-making that are incorporated in the final decisions
  - Percentage change in the number of women assuming leadership positions in rural organizations

- Presence/absence of GAD agenda in the project
- Presence/absence of GAD agenda in organizations created by the project

- Gender-role stereotyping
  - Proportion of women going into rural production activities or enterprises that have been traditionally associated with men

INFRASTRUCTURE

- Access of women/men to infrastructure/facility
  - Rate of utilization of the infrastructure or facility, by sex of users
  - Proportion of women to total users of the facility
  - Proportion of female-headed households to total households using the facility
  - Percentage change in the number of women/female-headed households using the facility

- Access to employment generated by the infrastructure project
  - Number of woman/man workers employed by the project during the project's construction phase
  - Number of woman/man workers employed by the project/organization for the operation and maintenance (O&M) of the infrastructure/facility
  - Proportion of women to total workers employed during the construction phase, by type of job
  - Proportion of women to total workers employed for O&M of the facility

- Effect on time use of the beneficiary population (women and men, girls and boys)
  - Travel time to/from market
  - Travel time to/from water source
  - Percent of time for productive activities
  - Percent of time for reproductive activities
  - Percent of time for leisure

- Participation in users' organizations
  - Proportion of women to total members of users' organizations
  - Percentage change in the number of woman members of users' organizations
  - Proportion of women to total leaders of users' organizations

- Participation in training and similar project activities
  - Proportion of women to total participants in the O&M training
  - Proportion of women to total participants in the leadership training

- Effect on females/males of involuntary resettlement resulting from the project
  - Number of women/men who lost their livelihood
  - Travel time of women/men to the market
  - Travel time of women/men to the workplace

- Travel time of girls/boys to school
- Travel time to nearest health facilities

- Participation in decision making
  - Inputs of women/men to decision making concerning the infrastructure project or facility (design, location, use, management) that are incorporated in the final decisions
  - Percentage change in the number of women assuming leadership positions in users' organizations
  - Presence/absence of GAD agenda in the project
  - Presence/absence of GAD agenda in users' organizations

PRIVATE SECTOR DEVELOPMENT

- Performance of women- and men-owned enterprises in areas of project intervention
  - Rate of adoption of project interventions among women- and men-owned enterprises
  - Percentage change in performance indicators (profits, market coverage, sales) of women- and men-owned enterprises
- Ownership of enterprises/establishments
  - Proportion of women to total number of enterprise owners (or major stockholders), by industry
  - Proportion of women to total number of managers, by industry

- Participation in training, trade missions
  - Proportion of women to total skills training participants, by type of training
  - Proportion of women to trade-mission members, by destination and by type of mission
  - Number of business deals clinched by woman/man participants during trade missions

- Access to loans (borrowers' and loan profiles)
  - Proportion of women to total borrowers
  - Average loan of woman/man borrowers
  - Proportion of loans going to woman borrowers

- Access to non-loan project resources (market linkages, technical advice)
  - Proportion of women to total beneficiaries of a particular project resource
  - Percentage change in the number of women benefiting from the project resource

- Participation in industry or workers' organizations
  - Proportion of women to total members of industry organizations
  - Proportion of women to total leaders of industry organizations

- Proportion of women to total members of workers' organizations in industries covered by the project
- Percentage change in the number of woman members of workers' organizations
- Proportion of women to total leaders of workers' organizations

- Women-friendly workplaces
  - Proportion of occupational safety cases involving woman workers to total
  - Presence/absence of Committee on Decorum and Investigation (CODI) or a similar mechanism for handling sexual harassment cases
  - Presence/absence of reproductive health services, including family planning, onsite
  - Number of women/men availing themselves of health facilities onsite

- Satisfaction rating with project interventions
  - Proportion among woman/man beneficiaries who are satisfied with the project intervention
  - Reasons for dissatisfaction among woman/man beneficiaries
- Employment generated by the project
  - Proportion of women to total workers employed as a result of the project
  - Percentage change in the number of women employed by the industry

- Participation in decision making
  - Inputs of women/men to decision making concerning the industry that are incorporated in the final decisions
  - Presence/absence of GAD agenda in the project
  - Presence/absence of GAD agenda in industry/workers' organization supported by the project

SOCIAL SECTOR: EDUCATION

- School participation rate at the elementary and secondary levels for females/males in rural/ urban areas

- Net enrolment rate at the elementary level for females/males in rural/urban areas

- School dropout rate per grade level in elementary schools for females/males in rural/ urban areas

- Tertiary-level enrolment
  - Proportion of women to total enrolment
  - Proportion of women to total graduates
  - Distribution of woman/man enrollees, by academic program or discipline
  - Distribution of woman/man graduates, by academic program or discipline

- Performance of female and male students
  - Passing rate in the National Elementary Achievement Test (NEAT) and National Secondary Assessment Test (NSAT) for female and male students in rural/urban areas
  - Board and licensing examinations
  - Competency examinations (Technical Education and Skills Development Authority)
- Employment in the education sector
  - Proportion of women to total teachers at the elementary, secondary, and tertiary levels
  - Proportion of women to total principals/supervisors/superintendents in public schools
  - Proportion of women to total deans and school heads at the tertiary level
- Gender sensitivity of school curricula, programs, and services
  - Presence/absence of sexist language, messages, and graphics in textbooks
  - Presence/absence of guidance counselors trained in nonsexist career counseling
  - Presence/absence of mechanisms for addressing sexual harassment in campus
- Participation in project activities, including teachers'/supervisors' training
  - Proportion of women to total participants, by training program
  - Percentage change in the number of women employed by the sector
- Participation in decision making
  - Inputs of women/men to decision making concerning the education sector that are incorporated in the final decisions
  - Proportion of women to total members of education boards
  - Proportion of women to total officers of parent-teachers' associations
  - Proportion of women to total members of teachers' organizations
  - Proportion of women to total officials of teachers' organizations
  - Presence/absence of GAD agenda in the project
  - Presence/absence of GAD agenda in parent-teachers' associations
  - Presence/absence of GAD agenda in key teachers' organizations

SOCIAL SECTOR: HEALTH

- Physical welfare
  - Infant mortality rate, by sex
  - Child mortality rate, by sex
  - Child morbidity rate, by sex
  - Adult morbidity rate, by sex
  - Life expectancy (in years), by sex

- Major causes of morbidity, by sex
- Major causes of deaths, by sex
- Maternal mortality rate
- Nutritional status, by age cohort and sex
- Chronic energy deficiency, by sex
- Proportion of women to total population screened for the disease
- Rate of infection, by sex
- Proportion of women to total treated for a disease
- Cure rate, by sex

- Gender-sensitive content of health programs, as indicated by the presence of the following:
  - Reproductive health services, including adolescent reproductive health, family planning and contraception, increased male participation, breast cancer, maternal and child health, violence against women (VAW), and other elements of reproductive health
  - Mechanisms for addressing the health aspects of violence against women
  - Health services for different age groups, particularly the elderly

- Gender-sensitive delivery of quality health services
  - Presence/absence of health personnel trained in the delivery of reproductive health services and support for survivors of violence against women
  - Availability of material support (such as drug supply, contraceptive supply, scanning facilities for breast cancer) for reproductive health programs
  - Number of women and men recruited by the project to serve as health volunteers
  - Proportion of men to total health volunteers
  - Presence/absence of mechanisms for addressing VAW cases

- Utilization of or access to health project services in urban and rural areas
  - Rate of contraceptive use by women and men
  - Number of beneficiaries of the nutrition project or program, by sex; or proportion of female to total beneficiaries of the nutrition project or program
  - Number of beneficiaries of the health project or program, by sex; or proportion of female to total beneficiaries of the health project or program

- Participation in project activities, including training of health personnel and officials
  - Proportion of women to total participants, by training program
  - Percentage change in the number of women employed by the sector
  - Proportion of women to total employed by the project, by type of job

- Participation in decision making
  - Inputs of women/men to decision making concerning the health sector that are incorporated in the final decisions
  - Proportion of women to total members in health boards
  - Proportion of women to total members of health workers' organizations
  - Proportion of women to total officials of health workers' organizations
  - Presence/absence of GAD agenda in the project
  - Presence/absence of GAD agenda in health workers' organizations

SOCIAL SECTOR: HOUSING AND SETTLEMENT (for the infrastructure component of the project, refer to the relevant sector in this appendix)

- Access to and control over the housing units provided by the project
  - Proportion of women to total population invited by the project to orientation or briefing sessions
  - Proportion of women to applicants for housing units in the housing and settlement project
  - Proportion of women to applicants granted a housing unit in the project
  - Proportion of women holding the deed or title to the housing units
  - Satisfaction rate with the housing and/or settlement design and layout, by sex of housing project beneficiaries

- Participation in project activities and organizations
  - Proportion of women to total members of homeowners' or similar community-based organizations formed by the project
  - Proportion of women to total officials of homeowners' or similar community-based organizations formed by the project
  - Proportion of women to total participants in training and similar project activities, by type of training or activity
  - Proportion of women employed by the project, by type of job
  - Proportion of women to total beneficiaries who lost their livelihood as a result of the project
  - Proportion of women to total beneficiaries who participated in the deliberation over the layout and design of the housing or settlement

- Effect on time use of beneficiary population (women, men, girls, and boys)
  - Travel time to/from water source
  - Travel time to/from the market
  - Percent of time for productive activities
  - Percent of time for reproductive activities
  - Percent of time for leisure

- Participation in decision making
  - Inputs of women/men to decision making concerning the housing and settlement project that are incorporated in the final decisions
  - Proportion of women to total members of housing boards
  - Proportion of women to total members of housing industry organizations
  - Proportion of women to total officials of housing industry organizations
  - Presence/absence of GAD agenda in the project
  - Presence/absence of GAD agenda in housing industry organizations

SOCIAL SECTOR: PROJECTS FOR AREAS UNDER ARMED CONFLICT, OR WOMEN AND PEACE PROJECTS (for indicators for infrastructure, housing and settlement, and health components, refer to the relevant sector in this appendix)

- Availability of gender-responsive services or facilities in refugee camps
  - Presence/absence of security mechanisms to protect women and girls from sexual and other forms of violation
  - Crimes committed in refugee camps, by victim/perpetrator of crimes
  - Presence/absence of services or facilities in support of women's reproductive responsibilities (such as child-minding services, and facilities for cooking and laundry)
- Access to humanitarian and other forms of assistance
  - Proportion of women and girls to total recipients of humanitarian aid
  - Proportion of women to total recipients of livelihood and other economic aid
  - Proportion of women to total employed by the project
- Participation in project activities
  - Proportion of women to total members of community organizations formed by the project
  - Proportion of women to total officials of community organizations formed by the project
- Participation in peace negotiations and decision making
  - Proportion of women to total members of peace negotiation panels for the government; for other groups
  - Inputs of women/men during peace negotiations that are incorporated in the final decisions
  - Presence/absence of GAD agenda in the project
  - Presence/absence of gender concerns in the peace agenda of negotiating panels

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Philippine Commission on Women

Australian Agency for International Development

Canadian International Development Agency

European Commission

Japan International Cooperation Agency

Asian Development Bank

World Bank

Voluntary Service Overseas Philippines

United Nations Country Team

International Labour Organization

United Nations Development Programme

United Nations Population Fund

United Nations Children's Fund

World Health Organization

