Monitoring Gender, Poverty and Social Equity in Natural Resource Management

Best Practice Resources and Annotated Bibliography

IUCN Nepal
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MONITORING GENDER, POVERTY AND SOCIAL EQUITY IN NATURAL RESOURCE MANAGEMENT

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PREPARED BY:
Indira Koirala
Radha R. Gurung
Devraj Sharma

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PREFACE

This document was prepared to assist natural resources management institutions in Nepal to be more effective at their goals of poverty reduction and sustainable natural resources management. The importance of understanding the relationship between people and the natural environment is globally recognized - regardless of whether you start from a poverty reduction or environmental conservation perspective. Increasingly, institutions - be they government, bi- lateral or multi-lateral support programmes or civil society - are becoming committed to understanding and addressing issues of poverty and social inequity. Social equity or social inclusion is defined broadly in this document to include a variety of dimensions such as gender, caste, ethnicity and class. It involves understanding why certain people face systemic barriers that prevent their full and equal participation in and access to benefits from development.

In 2003, a number of individuals from various institutions working on natural resource management in Nepal formed a learning forum on gender, poverty and social equity. There was recognition in this group that addressing the issues of social inequity was a high priority in their work and would benefit from exchanges and peer learning. The forum is intended to respond to self-identified and prioritized challenges in the understanding and integration of these issues of social equity in their own work programmes.

This document is one outcome of the priorities identified by the learning group. Understanding the current and best practices on monitoring of social equity was prioritized because of its value as a learning and reflection tool. Monitoring lets us understand where we are in relation to set objectives. It highlights what is working well and what needs adjusting. Focusing on monitoring is not meant to minimize the importance of adequate planning and the development of clear goals and objectives. But without clear monitoring systems and indicators, we are unable to measure our progress in meeting these objectives. Effective monitoring strengthens planning and adaptive management; it further strengthens our ability to influence policy.

This document presents a snapshot of existing global experience, and is not meant to be exhaustive. It offers a summary of relevant resources so readers can decide if they want to seek more detail from the original resources. It includes a brief overview of 56 documents and more detail on the ten documents identified as ‘best resources’. All resources are available in Kathmandu, and where possible, resources have been included on a CD ROM.

The document has benefited from the efforts and support of many people, for which we are grateful. Dr. Mahesh Banskota, IUCN Nepal’s Country Representative, provided overall support for IUCN to extend efforts into this issue and explore the merits of a Gender, Poverty and Social Equity Learning Group. The Swiss Development Cooperation (SDC), and in particular Ms. Dibya Gurung, strongly supported the learning group concept, and provided much guidance and necessary seed funds. The GPSE Learning Group, and in particular the monitoring task team, provided guidance on the document concept, and provided useful feedback on initial drafts. Ms. Indira Koirala and Ms. Radha Gurung, with support from Mr. Devraj Sharma, undertook extensive research to identify and analyse relevant materials. They were consistently open to feedback to improve the document. Mr. Suman Rai shared ICIMOD’s experience in developing the Annotated Bibliography of Literature Related to Equity and Poverty in the Management of Common Property Resources in the Hindu Kush Himalayas, and worked with the consultants to amend the format used by ICIMOD. The document benefited greatly from editing by Mr. Thomas Matthew. Thank you all.

Julia Robinson
Programme Coordinator
IUCN Nepal
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<td>ADMADE</td>
<td>Administrative Management Design</td>
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<tr>
<td>CBO</td>
<td>Community Based Organization</td>
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<tr>
<td>CLUSA</td>
<td>The Cooperative League of the USA</td>
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<td>DFID</td>
<td>Department for International Development, United Kingdom</td>
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<tr>
<td>FAO</td>
<td>Food and Agricultural Organization of the United States</td>
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<td>FUG</td>
<td>Forest User’s Group</td>
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<td>GSPE</td>
<td>Gender, Social Equity and Poverty</td>
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<tr>
<td>GIS</td>
<td>Geographical Information System</td>
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<td>ICIMOD</td>
<td>International Centre for Integrated Mountain Development</td>
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<td>IFAD</td>
<td>International Fund for Agricultural Development</td>
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<tr>
<td>IUCN</td>
<td>The World Conservation Union</td>
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<td>LFSP</td>
<td>Livingston Food Security Project</td>
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<td>MPA</td>
<td>Methodology for Participatory Assessment</td>
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<td>M&amp;E</td>
<td>Monitoring and Evaluation</td>
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<td>NRM</td>
<td>Natural Resource Management</td>
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<td>NTFP</td>
<td>Non-timber Forest Product</td>
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<td>PAGEP</td>
<td>Participatory Assessment from a Gender Equity Perspective</td>
</tr>
<tr>
<td>PAME</td>
<td>Participatory Assessment Monitoring and Evaluation</td>
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<tr>
<td>PHAST</td>
<td>Participatory Hygiene and Sanitation Transformation</td>
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<tr>
<td>PRA</td>
<td>Participatory Rural Appraisal</td>
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<td>PSRP</td>
<td>Pressure State Poverty Response</td>
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<td>SDC</td>
<td>Swiss Development Cooperation</td>
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<tr>
<td>SEGA</td>
<td>Socio-Economic and Gender Analysis</td>
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<tr>
<td>SIDA</td>
<td>Swedish International Development Agency</td>
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<tr>
<td>SLF</td>
<td>Sustainable Livelihood Framework</td>
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<tr>
<td>USAID</td>
<td>United States Agency for International Development</td>
</tr>
<tr>
<td>WFP</td>
<td>World Food Program</td>
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<tr>
<td>WID</td>
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Introduction
I. INTRODUCTION

Many organizations are committed to promote sustainable and equitable development through integrating gender, poverty and social equity issues (GPSE) in natural resource management and conservation. To facilitate the process of learning and sharing among organizations and development practitioners, in 2003 IUCN - The World Conservation Union and the Swiss Development Cooperation (SDC) initiated a forum called the GPSE learning group. This forum serves to enhance knowledge among organizations from government, bilateral programs and civil society engaged in natural resource management (NRM) in Nepal. It aims to promote a learning environment by sharing information and experience, promoting learning through dialogue and debates and developing joint work.

The group identified six priority-learning areas related to GPSE integration and different organizations agreed to take the lead role in each of these themes. The six themes are:

i) understanding gender and social equity and its importance;
i) sensitization and education;
iii) sharing strategies for integration in the field;
iv) sharing strategies for integration into institutions;
v) sharing strategies for national policy and program influence; and
vi) sharing strategies for monitoring.

Of these six areas, the group prioritized themes 1 and 6.

IUCN took the lead role in sharing monitoring strategies and promoting learning from experience in Nepal and globally. A task team was formed from a sub-set of the organizations in the learning group to help prioritize actions for learning under this topic. The group prioritized a series of actions to facilitate: i) learning from existing global experience, ii) learning from the practical experience of the group members in Nepal, iii) identifying ways for organizations to collaborate on monitoring and specifically to support the Government of Nepal in its efforts to mainstream gender and equity issues through monitoring; and iv) to foster learning on monitoring by our local partners.

This document contributes to the first action item—learning from existing global experience. It is a compilation and review of existing national and global resources related to monitoring GPSE in NRM. The document consists of two volumes. Volume 1 contains a detailed discussion of some of the available resources on NRM concerning GPSE monitoring that can be considered best resources or best practices. These resources have been selected from the 56 resources annotated in Volume 2 of the report. This document is intended as a reference guide for the learning group and others who manage NRM programs and projects. It is hoped that the document will also contribute towards the development of a common monitoring system among all stakeholders in order to better understand the collective results of NRM in Nepal.

II. OBJECTIVES

The overall objective of the learning group is to foster learning on GPSE among key stakeholders, particularly NRM planners and implementers from government, bi- and multilateral programmes and civil society. One of the specific steps towards this end is a review of the best resources on the subject, with in-depth elaboration of the more critical dimensions of GPSE monitoring in NRM (Volume 1, Best Practice Resources) and a bibliographic reference with brief summaries of relevant literature (Volume 2, Annotated Bibliography). The document is intended to be of use to development and resource management policy makers, planners, researchers, practitioners and managers.

III. STRUCTURE OF THE DOCUMENT

Volume I of this document is an analysis of the 10 best resources from among the 56 that have been annotated in Volume 2. Volume 1 is subdivided into three parts. Part I deals with resources that focus on the conceptual aspects of monitoring. Part II is concerned with literature that focuses on methods,
tools and strategies. Part III concentrates on the best GPSE indicators. The resources listed in Volume 1 have been selected for their practical applicability in NRM. The review focuses in particular on the best elements from each resource based on the criterion of practical relevance. Volume 1 is intended as a navigational aid for readers to identify the resources most relevant to their needs.

Volume II is an annotated bibliography with brief descriptions of 56 documents. This bibliography consists of resources that focus exclusively on gender, poverty or social equity monitoring and has been arranged by author surnames in descending alphabetical order. The description of each resource has been limited to a page-length summary highlighting its major essence. The description in the main text includes the overall purpose of the document, its major elements, and for whom the document will be useful. Key words at the end capture the usefulness of the resource in key monitoring areas.

The bibliography follows a standard descriptive format, classifying each resource by type, identifying its specific GPSE dimensional focus and indicating its location. The literature in the bibliography is classified in the following categories:

1. **Discussion papers**: These are papers that present concepts and approaches developed and tested by different agencies, raising critical issues that emerged in the course of their practical application. They often submit tentative hypotheses, methods and conclusions derived from experience for further refinement through discussion and debate.

2. **Manuals/guidelines**: These are documents that outline methods, tools, frameworks, and indicators developed by individuals, agencies or researchers and tested in different situations and contexts. Documents incorporating policy guidelines developed by different agencies to meet their defined goals and objectives have also been included in this category.

3. **Case studies**: These are documents providing illustrative details of experiences and lessons learnt in the development and applications of concepts, approaches, tools, and indicators. Most of the selected case studies provide examples of the successful integration of GPSE in natural resource management.

The classification also provides information on “geographical area”, indicating the country in which the research or the approach was applied or tested. The bibliography also indicates which sector of natural resource management the document deals with. Under this rubric, some of the documents are marked “general”, to indicate that these do not directly focus on NRM but are nevertheless useful for developing monitoring strategies, approaches and indicators for natural resource management. This category also includes documents relating to natural resource management in general but which do not focus on any specific dimension of it. The bibliography employs a user-friendly format to provide a quick and easy overview of the listed documents. Library call numbers have also been provided for those documents available in resource centers in Nepal (notably ICIMOD and IUCN).

The bibliography incorporates two annexes. Annex A consists some websites with useful information and documents for further reference. These websites are in no way exhaustive, and in many cases include more general information on GPSE and are not specified to monitoring or NRM. Annex B lists keywords for each entry of the annotated bibliography to enable easy reference.

Where possible, electronic versions of the documents have been included on a CD ROM that serves as a companion to this document. The keyword matrix is also included on the CD ROM as a searchable x-cel file. Documents available in IUCN’s resource center can also be searched according to keywords through the on-line library search tool (www.iucnnepal.org).

**IV. METHODOLOGY**

A team of consultants was hired to prepare this document. Preliminary work on the document involved consultations with IUCN, SDC and key organizations with practical and research experience in NRM. Interaction with these organizations included discussions on their ongoing activities, with particular focus on the monitoring aspects, as well as inventorying relevant literature in their resource pool and libraries. Resources were identified and bibliographic lists compiled from the following sources in
Kathmandu: IUCN library, ICIMOD library, Swiss Development Cooperation (SDC), Department for International Development (DfID), Livelihoods Forestry Programme (LFP), Australian Government’s Overseas Aid Program (AUS-AID), US-AID, World Food Programme (WFP), NARMSAP, Netherlands Development Cooperation (SNV), and German Technical Cooperation (GTZ).

The collection of resources from the above mentioned institutions was followed by intensive web tracking for global resources. A total of two hundred resources were collected from both local sources and the web. These resources were then systematically reviewed. Criteria were then developed and applied to select the best resources for the documentation of best practices and a format was devised for presenting the annotation in a clear and accessible style.

Intensive discussions were held both with concerned government personnel and the GPSE group—particularly with members associated with this task, comments and feedback were received and on the basis of these inputs the document was finalized. GPSE group members, particularly those at IUCN, helped greatly in refining the document through detailed inputs on the conceptualization, presentation, organization, structure and format. The document was then edited for clarity.

V. LIMITATIONS

The bibliography reflects the limitations of its sources and the nature of the literature. Since the literature itself does not per se deal with best practices, it became necessary to identify best resources as best practices. The choice of best resources and the best elements within these resources was guided by their clarity as well as prior application in projects and programs.

The reviewed literature also reflects some systemic biases, and this is, in turn, reflected in the bibliography. Both the review of literature and discussions with experts from various organizations in Nepal confirm that there is little substantive documentation on the full spectrum of social equity or inclusion in natural resource management, and even less specific to monitoring of these issues. Most of the documents focus on gender and poverty. Resources on social equity are scarce because this is an issue that has emerged into prominence only very recently. The emphasis on gender is a measure of its importance in social equity. Unfortunately, other aspects of equal importance, such as caste, ethnicity and social and economic marginalization, have yet to gain their due recognition in NRM literature. Since most development organizations are presently concentrating on the conceptual aspects of social equity, monitoring has not received much priority in any realistic sense. In addition, while the scope of the bibliography is wide and encompasses a range of different aspects related to monitoring, such as strategies, methods, indicators and the like, no single document covers all of them in depth.

Another limitation is that the sample of literature is geographically biased. The most successful examples of application come from African experience and, hence, the bibliography contains a disproportionate number of resources that document cases from Africa. In addition, the bulk of the reviewed documents show a thematic bias in favor of the planning aspects of GPSE integration, and there is little elaboration on monitoring frameworks and tools. Some of the best documents focusing on planning have also been included because planning cannot be entirely separated from monitoring. In fact, monitoring cannot take place without stated plans and objectives whose progress is to be measured and calibrated.

Finally, this bibliography is neither exhaustive nor comprehensive as it was prepared within a fixed timeframe and was limited to documents available on the web during that time or available within major NRM resource centers in Kathmandu. It is, instead, intended to be an indicative document that guides readers to a substantial body of literature on monitoring of gender, poverty and social equity in natural resource management.
Volume One:
Best Practice Resources
1.0. Introduction

This volume presents the best practices in the monitoring of gender, poverty and social equity in natural resource management. The concept of best practices adopted here denotes the best resources available on the theme in terms of tested methods, tools, checklists and indicators for evaluating gender, poverty and social equity (GPSE) in natural resource management (NRM). The best resources have been selected from the documents reviewed in the Annotated Bibliography (Volume 2). This Volume describes the 10 best resources on monitoring concepts, methods, tools and indicators related to GPSE in NRM.

The main objective of this volume is to draw attention to some of the best practices of applied monitoring processes and methods from across the globe. The resources in this volume present either new concepts or methods or examples of how methods and tools have been refined and modified. Each best resource is described and specific examples provided of elements that could be applied. This consolidation of relevant aspects of relevant resources in a single document will help facilitate learning on the best practices of monitoring and make it easier for organizations to adopt and adapt these practices.

1.1. Structure of the Report

The resources are structured according to three areas of best practices: i) Conceptual Frameworks for Monitoring (Section 1); ii) Methods, Tools and Monitoring Strategies (Section 2); and iii) Indicators (Section 3). Each resource is discussed in four parts. The introductory part provides general information on the origin and nature of the resource document. The second part identifies and summarizes the best elements in the resource. Part three short-lists those aspects of the identified best elements that can be borrowed and replicated, particularly in the context of Nepal. The concluding part analyzes the possibilities of their application in Nepal and the major issues that are likely to arise in the process.

The three best practice areas are:

1. **Conceptual Frameworks for Monitoring**: These are mainly discussion papers that deal with issues of monitoring drawn from concrete experience. They deal with concepts, principles, frameworks and guidelines for monitoring GPSE in NRM. Some resources related to planning were included in this section because of the strong linkages between planning and monitoring. Planning guidelines often provide guidance for developing monitoring systems and indicators. Three resources are included in this section.

2. **Methods, Tools and Monitoring Strategies**: These are prescriptive resources, primarily manuals/guides/toolkits, which list tools, strategies and methods for use in specific projects for monitoring GPSE. Four resources are included.

3. **Indicators**: These three resources discuss indicators for monitoring GPSE in NRM, focusing on indicators that have been tested in relevant programmes.

1.2. Selection Criteria for “Best Resources”

Of the 200 resources collected from the web and local holdings, 10 were selected for detailed documentation. Practicable applicability in NRM has been the most crucial determinant in the choice of best resources in Volume 1 of the bibliography. Other criteria used were:

- clarity of presentation and depth of analysis
- extent of information provided
- prior application in NRM
- extent of actual replication by other agencies
- possibilities of further learning and adaptation
- potential for scaling up
- ease of further use
1.3. Terminologies Used

The following terms are used in this volume:

**Best Practices:** This refers to broad areas of practice within monitoring of GPSE that can guide policy, planning, practice and implementation. They have been separated into three sections: conceptual frameworks; methods, tools and strategies; and indicators.

**Best Resources:** This refers to the 10 documents in Volume 1, selected from the 55 listed in the annotated bibliography, that were found to be of most use and relevance regarding the three best practice areas of monitoring GPSE in NRM. These resources are thought most useful for learning as they illustrate the best practice areas. They are also referred to as ‘Best Practice Resources’.

**Best Elements:** These refer to specific elements from the best resources that are deemed most amenable to replication and adaptation in other contexts. These elements are highlighted under each resource.

2.0 BEST PRACTICE RESOURCES

2.1. Conceptual Frameworks for Monitoring Gender, Poverty and Social Equity in Natural Resource Management

Literature on conceptual frameworks for planning and monitoring the integration of socio-economic goals in NRM tends to be dominated by the livelihood–based paradigm. "An Overview of Current Approach, WWF" by Ehrichs Linda posits two approaches within the livelihood-based paradigm that are commonly used in projects and programs: the "entitlements approach" and the "sustainable livelihoods framework". These approaches are used by many agencies to develop their conceptual frameworks and monitoring guidelines.

Such guideline documents have a high degree of relevance because of their transferability to different contexts and adaptability to different circumstances. Some of these documents have detailed step by step explanations of various processes to be followed. They provide instructions on methods, tools and checklists and are based on past experience.

The three resources included under this category are:

**a)** *Managing for Impact in Rural Development* is a guide for Project M&E developed by IFAD in 2002. The document helps in clarifying concepts on various aspects of monitoring and evaluation.

**b)** *Natural Resource Management and Livelihoods: From Policy to Practice* is a program guideline which links the conceptual framework of livelihood analysis with strategies, tools and methods to be adopted for projects of the World Food Program (WFP). Though this document is specific to the needs of WFP, it is very useful for developing similar guidelines by other NRM agencies. It provides several tools and formats for monitoring the poverty and environment aspects of projects.

**c)** *A Guide to the Gender Dimension of Environment and Natural Resource Management* developed by Mary Picard in 1996 based on a sample review of USAID’s NRM projects in Africa. This guide conceptualizes various dimensions of gender for project monitoring and provides process indicators for measuring and ranking projects according to their success. It provides concrete examples of their application.

All three resources are based on direct experience. Since they are specific either to organizations or geographical regions, they need to be appropriately modified to suit each new context. In making such adaptations it is necessary to integrate the sustainable livelihoods approach with stakeholder analysis. The frameworks also need to be simplified for better understanding and use by local partner agencies. The following are the highlights of the best elements of these three resources. The aim has been to elaborate the most important elements for ease of reference and comprehension.
Best Resource No. 1:

Managing for Impact in Rural Development: A guide for Project M&E, IFAD, 2002

A. Overview

This monitoring and evaluation guide was developed by IFAD to improve the impact of projects. The document emphasizes a learning approach to monitoring and evaluation that uses achievements and problems for improving decision-making and accountability. It also focuses on practical ideas that can help to manage impact, dealing in particular with good project design and management practices for monitoring and evaluation. This guide is based on the experience gained from projects in countries as diverse as Armenia, Bangladesh, Colombia, Ecuador, El Salvador, Ghana, Guatemala, India, Indonesia, Malawi, Mali, Morocco, Nepal, Nicaragua, Pakistan, Peru, Tanzania, Uganda, Venezuela, Yemen and Zimbabwe.

This guide will help project implementers and primary stakeholders to:
- Clarify the impact a project is expected to have for the rural poor and how this will be achieved.
- Decide how progress and impact will be assessed.
- Gather and analyze the necessary information for tracking progress and impact
- Explain the reasons for success and failure and use this understanding to improve future action.

B. Best Elements

(a) The key elements for management for impact are:

i. Guiding the strategy for poverty impact: Understanding the goals and objectives of the project and then allocating available resources and guiding relationships between stakeholders to maximize impact.

ii. Creating a learning environment: Inspiring and helping those involved with the project to reflect critically on progress, to learn from mistakes and to generate ideas for making improvements.

iii. Ensuring effective operations: Planning, organizing and checking staff inputs, equipment, partner contracts, financial resources, (bi)annual work plans and communications to implement activities effectively and efficiently.

iv. Developing and using the M&E system: Designing and implementing information gathering and reflective learning processes to generate insights that help improve operational and strategic direction.

Developing an appropriate monitoring strategy is mainly a question of asking the right questions and getting the answers at the right time. Therefore, five static M&E questions to manage for impact are presented below:

Relevance: Is what we are doing now improving the situation at hand? Is it dealing with the priorities of the target group or not? Why?

Effectiveness: Have the plans (purposes, outputs and activities) been achieved? Is the intervention logic correct or not? Why? Is what we are doing now the best way to maximize impact?

Efficiency: Are resources being used in the best possible way or not? Why? What could we do differently to improve implementation to maximize impact at an acceptable and sustainable cost?

Impact: To what extent has the project contributed towards poverty reduction (or other long term goals)? Why? What unanticipated positive or negative consequences did the project have? Why did they arise?

Sustainability: Will there be continued positive impacts even if project funds run out in 4-5 years? Why?
C 'Best Elements' that can be borrowed

The following elements were found to have the most potential for adoption. Brief descriptions of these best elements are provided below. For more detail, see the original document.

(a) Methods for specific M&E tools

The resource includes a description of seven types of methods for M&E, and includes examples of their application in different organizations.

i. Sampling-related methods
ii. Core M&E methods
iii. Discussion methods (for groups)
iv. Methods for spatially-distributed information
v. Methods for time-based patterns of change
vi. Methods for analyzing linkages and relationships
vii. Methods for ranking and prioritizing

In all, 34 methods are included in the document including:

<table>
<thead>
<tr>
<th>random sampling</th>
<th>non-random sampling</th>
<th>stakeholder analysis</th>
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<tbody>
<tr>
<td>documentary review</td>
<td>biophysical measurements</td>
<td>direct observation</td>
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<td>cost-benefit analysis</td>
<td>questionnaires and surveys</td>
<td>semi-structured interview</td>
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<tr>
<td>case studies</td>
<td>brainstorming</td>
<td>focus group</td>
</tr>
<tr>
<td>nominal group techniques [simple ranking]</td>
<td>strengths, weaknesses, opportunities and threats (SWOT)</td>
<td>dream realized or visioning</td>
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<tr>
<td>drama and role plays</td>
<td>sketch mapping</td>
<td>transects</td>
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<tr>
<td>GIS mapping</td>
<td>photographs and videos</td>
<td>diaries</td>
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<tr>
<td>historical trends and timelines</td>
<td>seasonal calendars</td>
<td>most significant change</td>
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<tr>
<td>rich pictures or mind mapping</td>
<td>impact flow diagram [cause-effect diagram]</td>
<td>institutional linkage diagram [Venn/chapatti diagram]</td>
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<tr>
<td>M&amp;E wheel [spider web]</td>
<td>systems [inputs-outputs] diagram</td>
<td>social mapping</td>
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<td>well-being ranking</td>
<td>relative scales or ladders</td>
<td>ranking</td>
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<td>pocket charts</td>
<td>matrix scorin</td>
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</table>

(b) Deciding what to monitor and evaluate

Section 5 of the guide deals specifically with concepts, frameworks and guidelines on what to monitor. The major highlights of this section are as follows:

a) Identifying what information is needed for what purposes and by whom is critical to successful M&E.

b) To manage for impact, an M&E system needs to track progress in relation to targets. It also needs to explain success and failure, in addition to identifying unintended positive or negative effects.

c) Monitoring requires the collection of information that answers five types of questions: relevance, effectiveness, efficiency, impact and sustainability of project efforts. It is essential to track information that will help projects strengthen gender equality and benefit marginal groups.

d) Collection of information should ideally be restricted to what is usable and necessary. The common M&E shortcoming of gathering data of limited quality in excess of what is actually analyzed should be avoided. Less data of high quality may lead to more useful information.

e) Use of the six steps of the logical framework approach (see (d) below) to complete the M&E matrix can give sufficient detail to implement the M&E plan.

f) As the project evolves, information needs and indicators should be reviewed periodically. While include new information needs, those that are no longer relevant should be discarded.
(c) Selecting indicators linking performance questions and information needs

This resource clearly highlights the link between performance questions, information needs and type of indicators to be selected to address the performance questions. The following table uses an example to demonstrate this relationship.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Performance questions</th>
<th>Information needs and indicator</th>
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<tbody>
<tr>
<td>Goal: Sustained improvement in off-farm income of 135,000 poor households living in lowlands.</td>
<td>What kinds of improvements have resulted from increased income opportunities facilitated by the project? Who has benefited from these improvements? Which target groups have not benefited? What is the likelihood that improvements will be sustained? What are the unintended negative or positive impacts of these enhanced income-generating activities (IGAs)?</td>
<td>The types of improvements per target group Level of income change (increase/decrease) has been registered per target group People’s own assessment of why incomes have increased or decreased Percentage of households that have not benefited Constraints to sustaining income increases Negative impacts (social, environmental etc.) of IGAs?</td>
</tr>
<tr>
<td>Purpose: Enhance income-generating activities for the project target groups.</td>
<td>What types of income generating activities have been created? How many people have taken up which new IGAs?</td>
<td>Types of IGAs created Number of people who are pursuing each IGA Types of IGAs for which people feel a need</td>
</tr>
<tr>
<td>Output 1: Improved savings and credit services available to the poor.</td>
<td>Who has benefited from which type of services? Who has been excluded</td>
<td>Types of savings/credit services Numbers of people making use of each service Problems with services and their causes Numbers of target group excluded from each service Level of local capacity to sustain services.</td>
</tr>
<tr>
<td>Output 2: Developed entrepreneurial skills among participating households</td>
<td>What types of skills have been improved among how many households? Is there gender balance in skill development? Do these skills fulfill a need in the project area?</td>
<td>Types of entrepreneurial skills developed Level of skills developed (women/men) Numbers in target group (women/men) with new skills Numbers of target groups excluded from skill development and the causes of this Local demand for new skills developed</td>
</tr>
</tbody>
</table>

(d) Applying the six step logical framework approach

i. Establish the general scope and focus of the project
ii. Decide on the planning framework, terminology and design process
iii. Undertake a detail situational analysis
iv. Develop a project strategy
v. Identify and analyze assumptions and risks
vi. Develop the monitoring and evaluation framework

D. Conclusion

Since this guide targets a diverse audience it has been structured to provide readers with different levels of detail ranging from general to specific needs. It provides both the key concepts and the practical details required to make M&E work. It also provides comprehensive advice on how to set up and implement an M&E system, with explanation of the principles that underlie each aspect of the construct and specifies which elements have been demonstrably proven as best practice in projects, giving examples of experiences in different contexts.

Managing for Impact in Rural Development:
A Guide for Project M&E, IFAD (2002) is available at IUCN library and www.ifad.org
Best Resource No. 2:

**Natural Resource Management and Livelihoods: From Policy to Practice**

**A. Overview**

This World Food Program (WFP) program guideline is intended for WFP personnel involved in programming and monitoring natural resource management and livelihood activities that focus on i) strengthening local NRM practices to support livelihood strategies; ii) helping people secure access to and control over natural resources; iii) diversifying livelihood strategies by reducing people’s dependence on natural resources; iv) strengthening links between environmental and socio-economic sustainability; v) decreasing the vulnerability of people’s livelihoods to recurrent shocks; and vi) addressing institutional blockages that impede securing sustainable livelihoods. The guideline gives very high priority to monitoring and provides several tools, methods and key questions to answer in monitoring WFP’s NRM related project activities. This guideline can be directly applied to NRM monitoring by other agencies as well.

**B. Best Elements**

WFP experience has shown that the five underlying livelihood principles will help in developing and implementing livelihood monitoring and evaluation activities. These five principles have very strong linkages with various aspects of monitoring and development of WFP’s M&E plan, which have been highlighted in the latter part of the document. These are:

<table>
<thead>
<tr>
<th>Principle 1: People centered, gender sensitive and participatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Livelihoods monitoring should be people centered, assessing not only whether the priorities of poor men and women are being addressed, but also their relative capacity to respond to various challenges.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principle 2: Comprehensive and cross-sectoral</th>
</tr>
</thead>
<tbody>
<tr>
<td>This requires looking beyond one type of program outcome to consider a number of different effects on women and, resulting from changes in: assets (natural, social, human, physical, financial), livelihood strategies, the vulnerability context and the political, legal and institutional context</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principle 3: Go beyond the local level</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is important to trace actions and results not only at the local level but also at the district, national or policy level, and the linkages between these levels. Increasingly livelihoods are affected by factors outside the community</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principle 4: Dynamic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given that livelihoods are dynamic and influenced by seasonal, cyclical and other trends it is important that monitoring captures these changes, for example changes in vulnerability and trends rather than only livelihood status</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principle 5: Outcome oriented</th>
</tr>
</thead>
<tbody>
<tr>
<td>The sustainability of interventions should be considered not only in terms of environmental sustainability but also economic, social and institutional sustainability</td>
</tr>
</tbody>
</table>

The guideline emphasizes that livelihood monitoring systems set up using the above principles can meet a number of project objectives. They can be used to:

- quantify changes in livelihoods (assets and outcomes) among food-insecure groups;
- understand the causes of these livelihood changes; and
- understand their effects on livelihood vulnerability and security.

Natural resource and livelihood monitoring requires a range of quantitative and qualitative methods to capture results. The use of different methods helps to develop a picture of the livelihood status of the poor in all its dynamic dimensions. In order to explore these aspects, the guideline suggests the following key questions:
Key questions in monitoring livelihoods and natural resource management

1. How is the activity addressing key vulnerability factors facing food-insecure groups?
2. What are the ways in which improved natural resource management and income-earning opportunities are enhancing livelihoods?
3. What are the current trends in asset acquisition and depletion among project participants and how are activities affecting these assets?
4. Is the activity having differential effects on men and women or different ethnic groups?
5. How are benefits shared and are distributional equity measures taken into account?
6. What contributions are NRM activities making to sustainable livelihoods (productivity, non-land-based income)?

C. Best Elements that can be borrowed

(a) Livelihood profiles

The NRM and livelihood monitoring system is designed through the creation of simple livelihood profiles based on WFP experience. The rationale and elements of the profile are as below:

WHY A LIVELIHOOD PROFILE:
• The livelihood profile was developed to help understand:
  ✓ who the most food-insecure groups are in a particular vulnerable area:
  ✓ the assets on which these different food-insecure groups rely;
  ✓ how they combine these assets in a livelihood strategy; and
  ✓ when and why these strategies are vulnerable and the key risk factors involved

WHAT ARE THE ELEMENTS OF A LIVELIHOOD PROFILE?
• It is made up of the following four elements, focusing on food-insecure groups:
  ✓ Livelihood assets (natural, human, financial, social and physical)
  ✓ Livelihood strategies (agricultural production, wage labor, migration, formal sector employment, sharecropping and coping mechanisms)
  ✓ Vulnerability context (including risks, conditions and trends) and
  ✓ Political, legal and institutional contexts (the factors that enable or obstruct people make optimal use of, or create new, assets)

(b) Analysis Format and key information areas

The document provides an analysis format for each of the four profile elements with a set of questions. The analysis format covers:

• information areas and tools for asset mapping
• information areas and tools for livelihood and coping strategies
• information areas and tools for analyzing the vulnerability context
• understanding risk and vulnerability factors affecting livelihood assets.

The following is an example of the vulnerability context analysis format as given in the guide.
Vulnerability Context Analysis

<table>
<thead>
<tr>
<th>Areas for analysis</th>
<th>Disaggregated information areas</th>
<th>Available tools for primary and secondary data gathering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trends</td>
<td>Decreasing natural resource base</td>
<td>Resource time lines</td>
</tr>
<tr>
<td></td>
<td>Degradation of natural resource base</td>
<td>Resource maps</td>
</tr>
<tr>
<td></td>
<td>Food Prices across the year</td>
<td>Focus group meetings</td>
</tr>
<tr>
<td></td>
<td>Tensions over natural resource use</td>
<td>Conflict and resolution time line</td>
</tr>
<tr>
<td></td>
<td>Food Prices</td>
<td>Conflict and alliance mapping</td>
</tr>
<tr>
<td></td>
<td>Morbidity and Mortality of animals and children</td>
<td>Stakeholders’ analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Secondary data on Climate change</td>
</tr>
<tr>
<td>Shocks</td>
<td>Natural Shocks and disasters, including droughts, floods, earthquakes, landslides</td>
<td>Resource time lines</td>
</tr>
<tr>
<td></td>
<td>Crop losses</td>
<td>Focus group meetings</td>
</tr>
<tr>
<td></td>
<td>Human health shocks, including HIV/AIDS</td>
<td>Conflict and resolution time lines</td>
</tr>
<tr>
<td></td>
<td>Conflict</td>
<td>Conflict and alliance mapping</td>
</tr>
<tr>
<td></td>
<td>Economic shocks</td>
<td></td>
</tr>
<tr>
<td>Seasonality</td>
<td>Fluctuation in crop harvest and access to food at different times of the year</td>
<td>Seasonal calendars</td>
</tr>
<tr>
<td></td>
<td>Length and intensity of “hungry period” and effects of the “hungry period”</td>
<td>Resource maps</td>
</tr>
<tr>
<td></td>
<td>Use of cash income during certain times of the year (e.g. for school fees, social rituals and festivals)</td>
<td>Focus group meetings</td>
</tr>
<tr>
<td></td>
<td>Availability of income-earning opportunities (agricultural, non-farm)</td>
<td>Resource time lines</td>
</tr>
<tr>
<td></td>
<td>Proportion of household food needs met by own production and portion purchased</td>
<td>Secondary data (price, economic, health and meteorological)</td>
</tr>
<tr>
<td></td>
<td>Proportion of output marketed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Price differences for crops and predictability of seasonal price fluctuation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Level of food stores across the year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Changes in health status by season</td>
<td></td>
</tr>
</tbody>
</table>

(c) Examples of crosscutting issues to be monitored

Three crosscutting issues for monitoring in NRM & livelihoods are:

a) Conflict
b) Tenure
c) Environment and Health

The document suggests key questions to be asked while monitoring these three crosscutting issues. These can be modified and incorporated into other projects according to relevant needs and priorities.

D. Conclusion

This guide provides excellent tested format and tools for the analysis of various aspects of livelihood and NRM derived from WFP’s previous experience in working with various communities across the globe. It provides clear reference points, benchmarks and parameters for the evolution of systematic program planning and monitoring frameworks for livelihood in NRM. Besides being an invaluable tool for those designing monitoring frameworks, it is also useful for researchers and impact evaluators in understanding the relationship between the various tools and methods and particular elements of livelihood analysis. Though the primary intention of this guide is to design program planning through livelihood analysis, the resources provided lend themselves to replication by other agencies either directly or with modifications. This guide is a must for all NRM managers in developing monitoring guidelines for their own programs and projects.

*Natural Resource Management and Livelihoods: From Policy to Practice* is available at IUCN Library and [www.landcoalition.org](http://www.landcoalition.org)
Best Resource No. 3:

A Guide to the Gender Dimension of Environment and Natural Resources Management: Based on Sample Review of USAID NRM Projects in Africa, by Mary Picard

A. Overview

Gender issues in natural resources management (NRM) require serious consideration because there are few cases of programs successfully ensuring gender equality. Knowledge of these issues is critical for successful project design, planning and implementation as well as for policymaking at the regional, national, and local levels. Familiarity with gender dynamics is absolutely indispensable in pursuing the objectives of equity and decentralizing control over natural resources and management plans to local institutions. The gender question is of significance in ensuring that the benefits of local environmental initiatives are distributed equitably so as to reach the traditionally disadvantaged groups within a community.

Since women constitute a large group and since their everyday activities involve a high degree of interaction with ecosystems, sustainable conservation with equitably distributed economic benefits requires the active participation of women. This is important not just in terms of widening democratic participation; it is also an absolute managerial necessity, because the absence of women’s participation can undermine sustainability in very crucial ways. It is for this reason that place of gender in distributional justice has acquired such prominence in development thinking. As a result, development practices at the level of both management and implementation has begun to appreciate the gender dimensions of the human-environment relationship and there is evidence of mounting support for women’s leadership role as environmental activists, decision-makers, and guardians of the natural resource base.

While the theoretical shift from a ‘women in development’ (WID) approach to gender analysis has permeated the work of most development institutions, the field level application of the concepts, tools and methodologies designed by gender specialists has tended to lag far behind. Part of the problem lies in the slow rate of internalization of gender consciousness and sensitivity in the process of transfer of gender analysis from gender specialists to project implementers.

This is the context in which Mary Picard has assessed eleven USAID funded projects in Africa for their treatment of and information about gender issues in design and other stages of the project cycle. She concludes that gender dynamic is weak in most of the sampled projects, which is attributable in large measure to the inadequate integration of gender perspectives in the monitoring of most of the ongoing activities. This document is based on a thorough review of existing project documents, focusing particularly on the analyses of gender issues, the set of common problems identified and listed and the suggested gender analysis areas, strategies and monitoring aspects to consider in designing and implementing environment related projects and programs.

B. Best Elements

1. Dimensions of Gender Analysis

Picard employs three principal spheres of analysis in examining the gender dimension of environment and NRM initiatives. Her emphasis on gender relations and socio-spatial dynamics is more than has been typically and traditionally accorded in NRM. A possible fourth sphere of analysis, relates to behavior and attitudes, which can be judiciously and carefully used in designing monitoring instruments and appropriate methodology for NRM projects. (Please see page 13 for the three spheres of analysis)

2. Key questions for gender analysis

Picard presents a set of gender analysis questions pertinent to the design of NRM projects and the formulation of environmental policy. These questions, which can be used in various contexts, such as planning, monitoring, evaluations and impact assessment, are mentioned in page 13.
Three spheres of analysis

<table>
<thead>
<tr>
<th>Gender relations</th>
<th>Socio-spatial dynamics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within the social unit of analysis (household, community, livelihood system) explore gender-based disparities in access to and control over resources, decision making, economic opportunities, among others, and investigate the level of bargaining and negotiating between the sexes that is tolerated and under what conditions.</td>
<td>Mobility, displacement patterns and the spatial location of human activity are commonly differentiated by gender as well as by other social variables. The “where” of these activities and their boundaries - abstract or real - are central to the relationship between humans and the environment.</td>
</tr>
<tr>
<td>Gender roles and responsibilities</td>
<td>Gender roles and responsibilities</td>
</tr>
<tr>
<td>Depending on the cultural gender division of labor, men and women have varying interests and motivations to conserve, protect or manage their resources. These interests of men and women need to be ascertained to create appropriate incentives.</td>
<td>Socio-spatial dynamics</td>
</tr>
</tbody>
</table>

Key questions for gender analysis

1. What is the gender division of labor in agricultural livelihood systems, domestic chores (e.g. fuel wood collection), and the management and exploitation of natural resources?
2. Within the household and within the community, what is the gender division of resources (access to and control over land, other natural resources, and productive resources)?
3. How does land tenure, in particular, affect men and women in the community? Who has ownership rights?
4. How do gender-based entitlements to income from sale of agricultural or resource-based outputs correspond to the use, access, and control of resources? Do men and women have separate accounting units in the household?
5. Are services, such as extension, inputs and credit, directed equally at men and women resource managers?
6. What is the gender-based indigenous knowledge of natural resources?
7. How do socio-cultural factors affect women’s (vs. men’s) visibility and voice at the household and community levels?
8. Are policies or legislation governing the exploitation, management and conservation of natural resources expected to affect men and women differently?
9. How do women and men organize to mobilize labor and other resources?
10. How do women figure in the decision-making process in government, ministries, scientific or research institutions that apply to the environment?
11. Are there female-headed households (“de-facto” and “de jure”), and how do they differ from male-headed households in terms of economic status and access to and control over resources in the community?

(Some of these questions, such as identification of roles and responsibilities, are generic and can be applied to any sector (agriculture, enterprise development, etc); others are more specific to the relationship between people and natural resources.)
3. Strategies to Address Gender Concerns:

Strategies for addressing gender issues are categorized into five different components, which may prevail in different combinations in different contexts. They are i) decision making; ii) female contribution or participation; iii) access to resources; iv) control over resources; and v) benefits. These categories characterize the concerns typically articulated with regard to the inclusion of women in the development process, although their decision-making roles and control over and access to resources have figured less consistently. The magnitude and definition of each of these strategies are significant. They indicate, in a sense, the goal level for achieving greater equity and project efficiency by applying gender as a crosscutting variable.

C. Best Elements that can be borrowed

i. **Dimensions of gender analysis** can serve as a very useful guiding framework. The three dimensions help in structuring gender concerns into the framework in a systematic way. The third dimension is of particular significance because the neglect of the variables categorized under it is frequently the reason for the failure to formulate effective strategies and secure effective outcomes in gender equity. Gender relations analysis is the crux of the whole framework, since it is the stated goal of most projects to change the prevailing patterns of gender inequality.

ii. **Key questions for analysis** can be borrowed and applied directly in the original form in any NRM project for monitoring and evaluation purposes. It can also help and guide in the formulation of gender indicators.

iii. **Strategies to address gender concerns** is particularly relevant because it lends itself to quantification in the evaluation of project efficiency. However, depending on the nature of project the monitoring team must collectively develop a list of possible strategies/activities and arrive at a consensus on the methods of quantification for process monitoring. An example of the quantification of process provided by Picard relates to “Female contributions or Participation” and is presented below to illustrate ranking methods in monitoring projects.

<table>
<thead>
<tr>
<th>Participation strategies adopted by different African NRM projects</th>
<th>Quantification (number of projects involved in the process)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Involve women in managerial aspects of community efforts or in design</td>
<td>2</td>
</tr>
<tr>
<td>Involve women in technical training, as well as in the project's resource management activities</td>
<td>2</td>
</tr>
<tr>
<td>Involve women for their labor and capital investment in land and other resources</td>
<td>2</td>
</tr>
<tr>
<td>Involve women in separate income generating activities</td>
<td>1</td>
</tr>
<tr>
<td>Women's participation subsumed under community participation</td>
<td>3</td>
</tr>
<tr>
<td>No concrete notions of how women will be involved</td>
<td>1</td>
</tr>
</tbody>
</table>

D. Conclusion

Gender is now commonly seen as a crosscutting issue in program and project design and implementation. However, the study found a lack of timely gender audit of project documents in the planning phase and the absence of proper guidance to design team members on whether the project has successfully addressed gender concerns. As a result the design of most projects frequently fails to address gender concerns even if these have been anticipated by the planners. Further, the failure to recognize the right kind of questions to ask and the type of information to consider in the course of implementation causes projects to underachieve on the gender front. The gender analysis dimensions, the key question checklists and the proposed strategies and ranking technique provided in the document will help project personnel refine the process of gender mainstreaming at the level of planning and implementation. The document can also be used to develop monitoring checklists and in gender training of project staff.
The document not only measures the gender sensitivity of USAID projects in natural resources management but also provides an overview of the full spectrum of WID literature. The latter is presented in terms of gender analysis questions, the articulation of problem statements relating to the relationship between gender and the environment, and the categorizing of strategies to address gender issues. Some tentative observations are appended to the end of the review section.

_A Guide to the Gender Dimension of Environment and Natural Resources Management_ is available at the IUCN library and [www.dec.org/pdf_docs/PNACA089.pdf](http://www.dec.org/pdf_docs/PNACA089.pdf)

### 2.2. Methods, Tools, and Monitoring Strategies in NRM

The most recommended approach for monitoring NRM and the most widely cited in the available literature is the Participatory Monitoring Method. There are two separate categories of resources that are relevant in this context. One of them is the literature that reflects the actual application of participatory methods in ongoing projects and programs, and the other deals with the development of new tools and methods primarily in the form of manuals and guidelines. Natural resource management is an area rich in development, application, modification and adaptation of participatory tools for project monitoring and a fairly large number of manuals and guidelines have been developed by different agencies. Most of the tools and checklists have been tailored to the needs of specific agencies and refined through application. Of all the interventions in NRM, community forestry has produced the most tools of the greatest applicability. Of late, in the design and application of these tools more emphasis has been placed on the facilitative and analytical aspects.

Of the reviewed materials, the best resource on the application of participatory community monitoring tools and practices examines the community-based monitoring systems used in three Zambian rural development projects (Administrative Management Design (ADMADE) National Parks and Wild Life Services, the Livingston Food Security Project of CARE and CLUSA Rural Group Business Programs). The “Methodology for Participatory Assessments” developed by the World Bank is also a useful resource that can help link participatory monitoring with institutional aspects. The best guidelines and tools developed in the form of manuals are FAO’s “community toolbox” and the five-volume socio-economic and gender analysis (SEGA) manuals. IUCN’s “In Search of The Lost Gender” is also a much cited source for the incorporation of gender concerns in NRM.

The consistent application of broad equity perspectives in protected areas will inevitably lead to the formulation of gender sensitive tools and methods. Vulnerability analysis, livelihood analysis and participatory monitoring methods are some of the recommended methods for addressing the equity and poverty aspects of NRM. In the specific case of gender equity, participatory gender analysis, through activity, resource and benefit analyses, is the method most recommended in the literature. Other recommended best practices for ensuring community participation and ownership in NRM project implementation include stakeholder analysis and cobweb analysis to capture the institutional dimensions and participatory baseline information methodology together with participatory action research methods.

Four resources have been selected as best resources on the application of participatory monitoring in NRM. Two of these deal with the application/systematization of participatory monitoring while the other two are manuals. Learning from both aspects can strengthen organizational monitoring systems. The four resources are:

*a) Methodology For Participatory Assessments With communities, Institutions and Policy Makers: Linking Sustainability with Demand, Gender and Poverty*, developed by Rekha Dayal et. al for the World Bank.

*b) The Community’s Toolbox: The idea, methods and tools for participatory assessment, monitoring and evaluation in community forestry*, developed by FAO

*c) A Profile of Community-Based Monitoring Systems of Three Zambian Rural Development Projects*, developed by USAID Zambia in collaboration with ADMADE, CARE and CLUSA.

*d) In Search of the Lost Gender: Equity in Protected Areas*, developed by Lorena Aguilar for IUCN.
Best Resource No. 4:

Methodology for Participatory Assessments with Communities, Institutions and Policy Makers: Linking Sustainability with Demand, Gender and Poverty by Rekha Dayal, Christine van Wijk and Nilanjana Mukherjee, World Bank

A. Overview

The Methodology for Participatory Assessments (MPA) was developed by the Water and Sanitation Project – Participatory Learning and Action initiative of the World Bank. It investigates the links between demand-responsiveness, gender-sensitive approaches and sustainability. This learning is an outcome of the application of MPA in assessing 18 large projects in 15 countries. The methodology of assessment has been successful in breaking ground in three important ways. First, it mainstreams gender and poverty indicators into a participatory methodology that can be used to monitor key aspects of sustainability. Second, it provides a means for stakeholders at the community, project, service provider and policy levels to clearly visualize actions that can contribute to sustainability. Third, it uses quantitative statistical methods to analyze qualitative data obtained from communities through participatory techniques. This methodology is a significant step forward in consolidating key social and sustainability indicators into a single user-friendly tool. The principal investigators, Rekha Dayal, Christine van Wijk and Nilanjana Mukherjee have applied this methodology in 30 countries with the involvement of 70 professional staff in the World Bank’s WSP projects.

MPA mainstreams gender and poverty as a part of the overall monitoring of sustainability in water supply and sanitation projects. The gender indicators used are based on Kate Young’s work on gender concepts (1993) and on the gender analysis frameworks developed by Catherine Overholt and others (1984) and by Caroline Moser (1993). In its participatory tools, the MPA builds upon earlier participatory methodologies such as Self-esteem, Associative Strengths, Resourcefulness, Action-Planning and Responsibility (SARAR), Participatory Rural Appraisal and the Participatory Hygiene and Sanitation Transformation (PHAST) project, combining the strengths of Minimum Evaluation Procedure’s (MEP) structural approach and the open-ended, visual and creative approaches drawn from these participatory toolkits.

B. Best Elements

The following three major components are the best elements of this resource.

1. Methodology for participatory assessment, which describes the features, analytical framework, sustainability indicators, analysis of gender and poverty aspects and the learning functions of participatory methods and tools. The variables, with their primary indicators and sub-indicators for water supply and indicators for community management sanitation programs and services, have been used in 18 locations globally. The list of indicators used for mainstreaming gender and poverty analysis within the overall monitoring of sustainability in WSS projects are as follows:

<table>
<thead>
<tr>
<th>Gender Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to information: Do men and women have equal access to information about their WSS projects?</td>
</tr>
<tr>
<td>Decision-making at planning stage: Do men and women make decisions during project planning and designs?</td>
</tr>
<tr>
<td>Construction and maintenance: How are the tasks of building and operating the WSS service distributed between men and women? Who does the skilled and unskilled work?</td>
</tr>
<tr>
<td>Training and payment: Do men and women have equal access to training and the paid work on the projects, as well as other benefits they may perceive?</td>
</tr>
<tr>
<td>Productive use: Are men and women able to use water for small-scale economic and reproductive (domestic) use? What are the implication for water availability and distribution of benefits?</td>
</tr>
<tr>
<td>Managerial decision-making: Do men and women both have managerial control over the operation of the WSS service?</td>
</tr>
<tr>
<td>Benefits: What are the practical and strategic benefits of the service and of the participation process for women and men, as perceived by either group? How do perceived benefits relate to perceived costs?</td>
</tr>
<tr>
<td>Policy and strategy: What gender policy exists in the sector and in sector agencies? Are they implemented in staffing and staff cooperation, procedures and training and supported by management?</td>
</tr>
</tbody>
</table>
2. **Guidelines for conducting assessment**, which include steps for selecting communities, establishing partnerships for assessment and data gathering. It first explains the process of data gathering beginning at the community level, then at the institutional level and concluding with the policy level. The second step in the guideline is self-scoring, which is the use of participatory tools for learning in partnership with the users and institutions involved in service delivery.

3. **Data analysis techniques**, which include the analytical framework together with gender, sustainability and poverty indicators and the linkages between these factors. Also included are stepwise processes for using the tools and methods to undertake participatory assessment. Data analysis follows certain processes and steps in interpreting the information generated from qualitative methods. The process includes the steps to be followed in quantifying qualitative information and generating second-level abstractions from specific empirical observations.

C. **Best Elements that can be borrowed**

The following elements of best practice are reflected from this experience:

- It provides description of tools (wealth classification, pocket voting, transect walk, ladders, card sorting, matrix voting, hundred seeds) that can be applied for the assessment of different projects particularly, water supply and sanitation projects.
- Application of each tool has been guided with the type of information to be obtained and the analysis and use of information techniques. This will help users in managing and analyzing information according to their context.
- It links community based information with policy level analysis and suggest areas for appropriate quantification of these information with matrix and assessment questions. Similar exercises can be replicated to systematize qualitative assessment and monitoring of projects in other NRM sectors.
- It contains a pool of matrix, formats and indicators, which can be borrowed by other sectors.
- It has been successful in mainstreaming gender throughout its methodology, guideline and assessment techniques.

D. **Conclusion**

It is a successful step towards directing project staff in managing qualitative information and undertake assessment using participatory methods. It will enable the users for documenting both qualitative and quantitative aspects to see the linkage between gender, poverty and sustainability and the use of NRM related services. It will also help to identify the factors that will influence the use of these approaches, such as an institutional environment that spells out what the approaches means in terms of institutional systems, incentives and performance criteria.

*This resource Methodology for Participatory Assessments with Communities, Institutions and Policy Makers: Linking Sustainability with Demand, Gender and Poverty is available at [www.worldbank.org](http://www.worldbank.org). Water and Sanitation Program or hard copy is available at IUCN Library.*
Best Resource No. 5:

The Community Toolbox: The Idea, Methods and Tools for participatory assessment, monitoring and evaluation in community forestry

A. Overview

This document incorporates the ideas of foresters and the study team of FAO/SIDA Forests, Trees and People Program and is based on the experience and needs of field staff. The manual The Community Toolbox is a product of this collective effort. This tool box introduces new ideas and approaches, provides the methods for determining information needs and the ways that information can be analyzed, presents descriptions of information collecting tools and furnishes criteria for the selection of appropriate tools for assessment and monitoring of community forestry projects. The toolbox has been applied in The Forests, Trees and People Program across the globe.

The document emphasizes the need for applying the Participatory Assessment, Monitoring and Evaluation (PAME) approach to exploring, investigating and incorporating the ideas of different stakeholders in sustainable community forestry development. It describes the various stages of deployment of the PAME tools and the appropriate participatory ways of collecting information for monitoring and evaluation. It recommends ways of undertaking participatory assessment, participatory baselines, participatory monitoring and participatory evaluation. It also explains “the how-to” of applying these tools by providing various examples.

B. Best Elements

The best elements of this resource are:

1. The rationale for and steps towards participatory monitoring

The reiteration of the rationale and justification for participatory monitoring, its various benefits and the steps to be followed are extremely important in reinforcing and reproducing the ethic of participatory processes in development practice. The document puts forward the following benefits of a participatory monitoring process:

<table>
<thead>
<tr>
<th>Strengths and benefits of participatory monitoring process</th>
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<tbody>
<tr>
<td>- Measures progress</td>
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<tr>
<td>- Provides information for decision makers</td>
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<tr>
<td>- Information is periodically analyzed</td>
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<tr>
<td>- Insiders choose the terms of measurement</td>
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<td>- Provides an ongoing picture</td>
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<tr>
<td>- Problems are identified and solutions sought early</td>
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<td>- Good standards are maintained</td>
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<td>- Sources are used effectively</td>
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<td>- Complete picture of the project is produced</td>
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<tr>
<td>- Creates an information base for future evaluations</td>
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</tbody>
</table>

Each of these steps is explained in detail, with pictorial illustrations of the field experience. Necessary formats for collecting and analyzing information have been also provided along with a list of critical issues to be looked into while conducting participatory monitoring.
The seven steps prescribed in participatory monitoring are:

<table>
<thead>
<tr>
<th>Steps in Participatory Monitoring</th>
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<tbody>
<tr>
<td>Step I: Discuss reasons for monitoring</td>
</tr>
<tr>
<td>Step II: Review objectives and activities</td>
</tr>
<tr>
<td>Step III: Develop monitoring questions</td>
</tr>
<tr>
<td>Step IV: Establish direct and indirect indicators</td>
</tr>
<tr>
<td>Step V: Decide which information gathering tools are needed (suggested tools given are i) community environmental assessment ii) survival surveys, iii) farmer's own records iv) nursery record books and v) community financial accounts. (All the tools are described in category III &quot;The tools&quot; section, which also has illustrations, details of processes and ways of analyzing information.)</td>
</tr>
<tr>
<td>Step VI: Decide who will do the monitoring</td>
</tr>
<tr>
<td>Step VII: Analyze and present.</td>
</tr>
</tbody>
</table>

2. **The tools and their use**

A range of tools has been used in community forestry programs. The resource documents 23 participatory tools, which have been modified to make them appropriate for community forestry programs. The explanation of each tool incorporates:

- Tool description
- Purpose of the tool
- Major benefits from the application of the tool
- Using the tool
- Precautions in using the tool
- Facilitation notes for the effective application of this tool.

Pictorial illustrations accompanying the description of each tool make the document user-friendly and easily comprehensible.

C. **Best Elements that can be borrowed**

The document introduces new tools, such as participatory action research, survival surveys, community environment assessment and farmers own records. The monitoring of ongoing community forestry programs can benefit greatly from the adaptation of these tools. The Maps and Mapping example presented in the next page illustrates the level of detail found in the resource and how these tools can be used for monitoring.

D. **Conclusion**

This document, developed on the basis of concrete field experience, offers excellent tools, steps and guidelines for participatory monitoring and evaluation of community forestry programs. Several tools have been modified and developed to fit the various steps and processes of participatory monitoring and evaluation. All tools and methods are illustrated with examples and pictorial diagrams, making the document user friendly. It also provides analytical techniques for major tools that generate information during the course of their use. The objective of this guide is to address the need of fieldwork in initiating the process of participatory monitoring and hence has been designed to have global conceptual applicability by abstracting the principles derived from specific empirical circumstances. It introduces the new approach of participatory assessment, monitoring and evaluation for increased efficiency of community forestry projects. Approaches, methods and tools suggested can be directly applied in similar projects with minimal orientation of project teams. This innovative document is a useful resource for strengthening participatory monitoring and evaluation in any organization.

The tools and checklists are designed primarily to capture and interpret information accurately through participatory methods. Some of the tools are simple and can be applied easily. However, care needs to be taken to ensure that the information generated by application of these tools is effectively managed. The application of these tools also requires capacity building in the areas of facilitation
and consolidation, a task which many agencies have not taken up seriously. While many agencies do apply tools at the lower level, the information accumulated is not adequately used for monitoring and reflection of projects. However, from the lessons learnt from past experience, many agencies are now focusing on designing and developing more optimal tools that consume less time and effort, identifying key facilitation areas through discussions and providing the basis for further linkages with higher level indicators and objectives.

*The Community Toolbox: The idea, methods and tools for participatory assessment, monitoring and evaluation in Community Forestry* is available at IUCN Library and [www.fao.org/docrep](http://www.fao.org/docrep)
A profile of the Community-Based Monitoring Systems of Three Zambian Rural Development Projects

A. Overview

The Three Zambian Rural Development Projects of USAID have successfully undertaken community-based monitoring. The CARE Livingstone Food Security Project, CLUSA Rural Group Business Program, and the National Parks and Wildlife Services (NPWS) Administrative Management Design (ADMADE) program endeavor to meet project information needs through training and development of community-based monitoring. This document explores the rationale behind the monitoring system and maps out the pattern of data flow for each of the projects under review. The differences and similarities are enumerated and new techniques are proposed for assessing the value and performance of monitoring. Case studies such as this will add to the pool of knowledge on monitoring and help to develop systems that maximize the benefits of community participation and monitoring.

A. Best Elements

The description of each project has been structured to explain:

- clearly defined monitoring objectives
- the philosophy and strategy informing the design of the monitoring system
- the logistics of monitoring which enumerates monitoring requirements
- the inventory of monitoring materials (formats, guideline, matrix)
- the monitoring of data consistent with donor objective and indicators

The strategies used by the three projects to meet their objectives are:

<table>
<thead>
<tr>
<th>Monitoring strategies - ADMADE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruiting local residents to collect data</td>
</tr>
<tr>
<td>Providing centralized training on monitoring, backed up by field visits when possible</td>
</tr>
<tr>
<td>Centralizing processing and analysis of data</td>
</tr>
<tr>
<td>Using geographic information system (GIS) software to include the spatial dimension of monitoring data in analysis</td>
</tr>
<tr>
<td>Supplementing field data on habitat and encroachment with satellite imagery</td>
</tr>
<tr>
<td>Using standardized data forms and data collection procedures to help meet the high standards of data forms and data quality needed for measuring trends in wildlife populations.</td>
</tr>
<tr>
<td>Circumventing falsification of data by offering financial incentives for monitoring</td>
</tr>
<tr>
<td>Using multiple indicators when possible to measure the same phenomenon (since independent cross-check of data is not feasible)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monitoring strategies - LFSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community participation in design process</td>
</tr>
<tr>
<td>Self-reliance and scope for innovation</td>
</tr>
<tr>
<td>Simplicity (the indicators selected for community-based monitoring have to be simple, intuitive and direct)</td>
</tr>
<tr>
<td>Field support (all activities, including monitoring, conducted within LFSP are supported by frequent support from the project field staff)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monitoring strategies - CLUSA Rural Group Business Program (to ensure sustainable record keeping)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom and on site training in record keeping by facilitators to accommodate the information needs and capacity of individual groups and business ventures</td>
</tr>
<tr>
<td>Avoiding dependency on externally supplied record materials</td>
</tr>
<tr>
<td>Frequent (e.g. weekly) inspection of written records and monthly CMS monitoring visits</td>
</tr>
<tr>
<td>Systematic information flow that disseminates and aggregates RGB data for analysis at higher level</td>
</tr>
<tr>
<td>Periodic audit</td>
</tr>
</tbody>
</table>
The case studies are clearly presented. Descriptions are supported by flow charts and diagrams, and information and data flow mechanism within each project is mapped in detail. Points for discussion emerging from the comparative analysis of the monitoring mechanisms of the three projects monitoring are presented. These discussion points are—i) lessons learned ii) innovation and evolution iii) documentation and monitoring-the-monitoring iv) strategies for integrating community participation v) standardization and vi) monitoring against goal and purpose level indicators.

The document also elucidates the linkages between community based monitoring systems and higher level monitoring mechanisms and provides the format of these linkages. A comparative analysis of the relative strengths and weaknesses of the three projects in terms of meeting overall objective provides very useful insights into the comparable variables of monitoring.

C. Best Elements that can be borrowed

1. The “Spider Model” Self-Assessment Tool for CBOs is accompanied by step wise descriptions of the various stages of community monitoring, such as “indicator development of group capacity” and its management factors, the selection of respondents and collection of data, the aggregation of data for each indicator, the diagrammatic presentation or visualization of data, the development of action plans and the uses of the model. The spider model can be adapted or modified according to the needs of the specific projects.

<table>
<thead>
<tr>
<th>Uses of the Spider Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. It can be used as a monitoring tools by the project that generates information about the status and changes in community groups</td>
</tr>
<tr>
<td>2. It can be a good tool for raising awareness among group members about the status of their group and instilling in the group executive a feeling of responsibility to the community.</td>
</tr>
<tr>
<td>3. It gives project a good indication about the process going on in a group and offers the opportunity to design tailor made support for further capacity building activities.</td>
</tr>
<tr>
<td>4. It can be used in evaluations to assess the status of the group</td>
</tr>
</tbody>
</table>

A sample Spider Model CBO assessment
As the diagram shows, variables for monitoring can be selected and then ranked according to the response received.

2. A Self-evaluation Tool for Monitoring, which contains monitoring worksheets for self evaluation, the type of information used, the sampling and sample rating system, the indicator selection process, the measurement technique, the analysis and rating system, the dissemination and sustainability based on value rated by the stakeholders, is an excellent tool that can be used to augment the monitoring process. The description of this tool comes with an outline, provided by USAID/Zambia, of some of the possible criteria that could be used to assess monitoring programs along with suggestions on possible indices for rating.

### Monitoring the monitoring: Self Evaluation Worksheet

<table>
<thead>
<tr>
<th>Information use</th>
<th>Performance Rating (1-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conceptual framework</td>
<td>Sampling</td>
</tr>
</tbody>
</table>

**Sample rating system**

i. The conceptual framework is poorly defined or non-existent

ii. The conceptual framework links the indicators and the ultimate use of the information is well formulated, articulated and widely known.

3. Impact Monitoring Matrix, useful for USAID strategic objective 1 partners.
4. Monitoring Bibliography that contains a list of resources on community based monitoring systems.

**D. Conclusion**

These three case studies demonstrate the practical applicability of the set of tools devised and their role in effective community based monitoring. The three projects provide a solution to the frequently encountered problem of insufficiently developed linkages between community based monitoring systems and higher-level indicators and objectives. The tools, format and strategies developed by these projects can be effectively applied in other NRM projects.

*The Community Toolbox: The idea, methods and tools for participatory assessment, monitoring and evaluation in Community Forestry* is available at IUCN library and [www.dec.org/pdf_doc/PNACD821.pdf](http://www.dec.org/pdf_doc/PNACD821.pdf)
Best Resource No. 7:

In Search of the Lost Gender: Equity in Protected Areas

A. Overview

This document is a conceptual and methodological resource that provides tools, techniques and recommendations to build processes to promote gender equity perspectives in protected area management. It was developed to facilitate protected area planning, management and administration to seek greater social equity, particularly between women and men. The document focuses on the process of ensuring social participation to address protected areas from broader points of view; it also includes theoretical and practical references and ways to sensitize decision makers to change traditional notions about conservation. It takes into account the various ecological, social, economic, cultural and political realities experienced in protected areas and provides examples from different regions of the world. The methods discussed in the document have been validated in Costa Rica, Mexico and Kenya. Though the intent of the document is to provide a conceptual base, the tools, methods and guidelines discussed are relevant for monitoring NRM from a gender perspective. The methods and tools in this document can be applied at different stages in the implementation of conservation initiatives in protected areas, particularly at the level of field application.

B. Best Elements

(a) Stakeholders need to be systematically identified and the nature of their relationship with and the extent of their participation or involvement in protected areas needs to be thoroughly established in conservation exercises that aim at sustainability. The ‘CAMPFIRE’ diagram technique helps in this process.

(b) The appraisal method helps to determine which activities should be implemented, and provides the parameters to measure their effectiveness and impact over time. Participatory appraisal from a gender equity perspective differs from traditional notions of appraisal generally used in protected areas as depicted in the following diagram:

<table>
<thead>
<tr>
<th>Appraisal</th>
<th>Systematic process to recognize a given situation and the reason behind its existence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participatory Appraisal</td>
<td>Systematic process to recognize a given situation and the reason behind its existence, where knowledge building takes place through the intervention and opinion of people involved in such a situation.</td>
</tr>
<tr>
<td>Participatory appraisal from a gender equity perspective (PAGEP)</td>
<td>Systematic process to recognize a given situation and the reason behind its existence, where knowledge building takes place through the intervention and differentiated opinion of people involved in such a situation, who, in addition to not being considered a homogeneous group, are recognized as women and men having different needs, perceptions and realities, depending on their gender, age and social condition. In other words, power relations within the community are exposed.</td>
</tr>
</tbody>
</table>

C. Best Elements that can be borrowed

(a) Six conceptual tools with examples of application-related techniques have been provided in the document. They are:
1. **Tool One—Analysis of the local context or situation**

This tool provides an entry point into the local context by enabling an initial approach to people interested in participating in conservation protected areas. It helps PAGEP facilitators unveil a set of economic, social, cultural and environmental scenarios. This will enable the acquisition of deeper and more systematic knowledge of each particular context, which in turn will enable them to proceed without imposing conditions and situations that stakeholders may not be fully prepared to accept. Key questions at various levels (relating to productive, socio-demographic, health, cultural, natural resource, political-institutional factors) are provided. The graphic technique serves to illustrate how this tool can be used.

2. **Tool Two—Work division by sex**

The key questions on the social division of work for planning and monitoring from a gender perspective are:

<table>
<thead>
<tr>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Who does what?</td>
</tr>
<tr>
<td>- Who participates in product catching, hunting, gathering or fishing activities, and how?</td>
</tr>
<tr>
<td>- Who participates in product processing and how?</td>
</tr>
<tr>
<td>- Who participates in product commercialization, and how?</td>
</tr>
<tr>
<td>b. How is it done?</td>
</tr>
<tr>
<td>- How are women, men, girls and boys involved in all stages of the productive process?</td>
</tr>
<tr>
<td>c. How much time is devoted to the activity?</td>
</tr>
<tr>
<td>d. Does it change according to the seasons of the year?</td>
</tr>
<tr>
<td>e. What is the distance to the workplace?</td>
</tr>
<tr>
<td>f. Is it an income-generating activity? Are women in control of the activity and potential income?</td>
</tr>
<tr>
<td>g. Are men and women culturally excluded from certain types of work? Which? Why?</td>
</tr>
<tr>
<td>h. In the case of changes in the type of activities women do:</td>
</tr>
<tr>
<td>- What is the impact on the family structure?</td>
</tr>
<tr>
<td>- How does it affect the distribution of responsibilities?</td>
</tr>
<tr>
<td>- Do men completely avoid some of their responsibilities and pass them over to women?</td>
</tr>
<tr>
<td>- What are the working opportunities for men and women within the tourist industry?</td>
</tr>
<tr>
<td>- What are the working conditions like?</td>
</tr>
<tr>
<td>- What is the type of work carried out by women in activities related to industrial processing of resources?</td>
</tr>
<tr>
<td>- What is the hiring policy?</td>
</tr>
<tr>
<td>- What are the working conditions?</td>
</tr>
</tbody>
</table>

Two techniques (calendar of annual activities according to gender and 24 hour reminder) have been provided to illustrate this tool.

3. **Tool Three—Use, access and control of resources, and distribution of costs and benefits**

The resources within the ambit of this tools applicability include economic productive resources, political resources, time and benefits. Four techniques (who owns the thing?, how do I have what I have?, differentiated use of the forest and the path of the resources) have been provided to understand this tool better.

4. **Tool Four—Environmental degradation and impact by sex/gender**

An indispensable factor in analyzing the problems of environmental degradation is the assignment of responsibility for implementing the sustainability practices that have been designed for environmental recovery. A consideration of equal importance is the identification of those sections of the population which derive benefits and those sections which bear the costs of environmental degradation arising from prevailing practices. This makes it possible to identify imbalances and, thus, facilitates the process of negotiating a consensus on instituting more equitable forms of cost and benefit sharing, both between men and women, and between diverse social groups. The document presents a “before, now and after tool” along with the procedures, material and objectives, to capture the above concerns. This tool diagrammatically calibrates the circumstances of community related environmental degradation in three stages—before, now and after.
5. **Tool Five—Culture and traditional notions**

Key questions and techniques (socio-dramas and representations) are provided to illustrate this tool. The questions relevant to the application of this tool are:

- Are there traditional or customary regulations and legislations regarding the use and conservation of natural resources?
- Are there common law rights over natural resources and informed agreements regulating the access to community or "open" resources?
- Are there myths or local legends associated with any of the activities carried out in the project activities by men and women?
- How dependent are community populations on the resources in terms of social customs, cultural practices, or ceremonial or religious practices?
- Is any special cultural or spiritual significance attached to a particular site or species?
- Which is the traditional knowledge about the climate, dynamics of natural resources, etc? Is it differentiated by gender?
- Are there any gender-based cultural restrictions affecting the access to or control of any resource?
- What are the cultural regulations, traditions or restrictions that affect gender relations associated with the productive and environmental aspects?

6. **Tool Six—Participation levels**

Key questions and techniques (institutional diagram) are provided to illustrate this tool. The questions critical for the completion of the institutional diagram are:

- How are the male and female stakeholders involved in the decision-making and planning processes at the household and community levels?
- What type of institutions and organizations exist (traditional, clans, formal and informal associations and organizations), and what is their socio-demographic composition (by sex, age, ethnicity, etc.)?
- Are there specific institutions, organizations or groups of stakeholders linked to the management of any natural resource? Are these local or do they enjoy national or international recognition?
- In which organizations or groups of stakeholders are women involved and how? What is the projection or impact of the groups' actions on community life?
- Are there social networks and networks for mutual help to strengthen the community's organizational processes? How do men and women participate in these networks, what are their roles?
- Are there social structures to facilitate negotiation processes among the different stakeholders?
- What level of information do men and women have about the legal dispositions affecting their rights in general terms, and their access to and use of resources, in particular.

**D. Conclusion**

This document does not intend to substitute the techno-scientific proposals of conservation initiatives but aims to enhance them. The tools have been conceived of as dynamic instruments subject to and eliciting feedback, improvement, and updating, for which field validation was conducted. The document is useful in helping promote gender equity in protected area conservation initiatives, particularly in the development of M&E plans. It is a particularly useful reference for understanding the gender equity concepts, tools and techniques to be followed in monitoring. It provides a list of basic equity promotion elements and equity promotion ideas along with the necessary level of description. The tools and techniques provided are accompanied by detailed explanations of the process and key question to consider in their application. The document is punctuated with boxes of case examples supporting the need for and relevance of these key questions. This is a persuasive
and successful resource largely because of its clarity of analysis, fluency of description and coherence of argument and is therefore particularly useful in encouraging project planners and monitoring personnel to integrate gender into the equity dimension of their activity.

*In Search of the Lost Gender: Equity in Protected Areas* is available at IUCN library and [www.generoyambiente.org/ES/publications_uicn/moduloapi/moduloapi.htm](http://www.generoyambiente.org/ES/publications_uicn/moduloapi/moduloapi.htm)

### 2.3. Indicators for Natural Resource Management

Many initiatives have developed indicators to track trends and developments in the state of the environment and indicators reflecting gender and human development, with indices for comparison between countries as well as over time. However, very little has been done in developing indicators that reflect the relationship between human development (particularly poverty) and environmental issues. Therefore, three resources have been selected which have listed indicators that focus on human poverty and environment. Two of the resources describe the best poverty-environment indicators (by DFID and the World Bank). For ease of reference and consultation, the indicators suggested in these resources have been reproduced in their original form. The third resource deals with the conceptual aspects of developing gender sensitive indicators with examples of “participation” and “empowerment” indicators.

By far the vast majority of available documents equates or associates social equity with gender equity, to the exclusion of caste, ethnic and class equity. No best practices could be identified in the case of indicators on the caste, ethnicity and class dimensions of social equity. These dimensions have only recently surfaced in development discussion and most agencies, particularly those in South Asia, are still at a preliminary stage in developing appropriate concepts to grapple with these problems. However, the Nepal Swiss Community Forestry Project guideline has the potential to help develop such indicators based on the checklists and frameworks that it has provided. The new program of the Nepal Australia Community Resource and Livelihoods Management Project has also integrated some of these aspects which could help facilitate indicator development. Since the work of these projects is still under development they have not been included in this volume.

Though a suggested list of indicators has been compiled from these resources, they are to be used with caution. Each agency should, through participatory processes, develop indicators relevant to their respective contexts and appropriate to the resources available to monitor them. Indicators are perhaps the most controversial aspects of development interventions and necessary caution should be exercised in developing them, always keeping in mind the intensity of data collection requirements. For ensuring the efficiency and sustainability of projects, qualitative indicators for process monitoring, particularly in gender and social equity integration, are also recommended.

The following three resources document methods tested and applied in the field. Useful indicators, which can be adopted immediately, are presented in boxes.

a) **Poverty-Environment Indicators** developed by Priya Shyamsundar for the World Bank provides list of good and measurable indicators with suggested data sources for them.

b) **Poverty and the Environment: Measuring the Links: A Study of Poverty-Environment Indicators with Case Studies from Nepal, Nicaragua and Uganda** developed by DFID. The proposed poverty-environment indicators were pre-tested in Nepal and are therefore a very useful resource.

c) **The Why and How of Gender Sensitive Indicators** developed by Dr. Tony Beck for CIDA is a very useful resource for gender sensitive indicators relating to “participation” and “empowerment”.
Best Resource No. 8:

**Poverty - Environment Indicators**

A. Overview

Indicators are important for designing and evaluating broad strategies, programs and individual projects. They are useful for monitoring changes and trends over time; they provide a means for comparing progress across different countries and are needed for evaluating the results of projects. Without indicators, well-developed strategies and programs can be rendered meaningless. The biggest problem associated with indicators is in making the right combination of choices. Indicator measurement is another challenging task. In the absence of measurement techniques and methods, indicators are often not measured despite the care and emphasis given in their design and selection during the planning phase. Priya Shyamsundar’s 2002 document, developed for the World Bank, suggests the different ways in which indicators can be used to understand poverty-environment linkages and to monitor poverty reduction through environmental interventions. Her work focuses on two aspects of the environment that affect the poor—a) environmental conditions that impact the health of the poor and b) natural resource conditions that affect the income and security of poor households.

B. Best Elements

The document recommends a list of indicators that show the extent to which poor people depend on resources together with illustrations that demonstrate their importance. The list of suggested indicators draws on the practical experience of various projects and are as follows:

<table>
<thead>
<tr>
<th>S.N.</th>
<th>Poverty Issue</th>
<th>Poverty-environment Indicators</th>
<th>Influencing NRM factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Income and opportunity</td>
<td>Percentage of rural population below poverty line</td>
<td>Deforestation, Water scarcity, Over-fishing, Land degradation</td>
</tr>
<tr>
<td>2</td>
<td>Time spent by household members to collect water and fuel wood</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Distance walked by household members to collect water and fuel wood</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Quantity of annual household consumption derived from common lands</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Quantity of annual household consumption that is derived from forest products and fisheries1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Percentage of irrigated area in total cultivated area by wealth/income categories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Percentage of rural households with adequate water for livestock by wealth/income categories2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Food Security</td>
<td>Rural per capita cereal production</td>
<td>Land degradation, Water scarcity, Pest outbreak, Natural disasters</td>
</tr>
<tr>
<td>9</td>
<td>Percentage of farmers who grow drought resistant crops by income/wealth quintiles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Quantity of household consumption that is derived from forest products and fisheries1</td>
<td>Deforestation, Over fishing</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Percentage of rural children under five who are underweight</td>
<td>Land degradation, Water scarcity, Water quality</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Percentage of rural children under five who are stunted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Percentage of rural children under five who are wasted.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Vulnerability to natural disasters</td>
<td>Households rendered homeless from floods/hurricanes/cyclones/landslides per year by income/wealth quintiles</td>
<td>Natural disaster, Deforestation</td>
</tr>
<tr>
<td>15</td>
<td>Number of deaths from natural disasters by income/wealth quintiles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Percentage of farmers with land on slopes/wetlands by income/wealth quintiles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Percentage of rural children under five who are wasted</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 Among households that are largely dependent on natural resources with few alternative income/employment opportunities.

2 Field tested by a DFID research group (2001)
C. **Best Elements that can be borrowed**

1. **Definition of Indicators**

The definition of indicators and the ways to measure them is by far greatest strength of this document. This is particularly due to the clarity of the measurement techniques and the justification for the selection of these particular indicators. The following example illustrates the methodological and analytical clarity of this document.

"Percentage of rural population below the poverty line" is suggested as a basic indicator of income poverty. Similarly "rural per capita cereal production" is another basic indicator. Indicators such as "time spent to or distance traveled to collect water of fuel wood" are proxies for effort expended on obtaining livelihood resources or income. These two indicators are particularly important to understand resource degradation impacts on women and children. Time and distance indicators provide information on the increased burden on women and children that may result from deforestation, drying-up of water sources, or a decline in access to fuel-wood and water because of changes in property rights. Indicators "quantity of household consumption derived from forest products" and "quantity of household consumption that is derived from commons" are indicators for income poverty. "Percentage of irrigated area in total cultivated area" can provide information on the poor's access to an important agricultural input, if data is disaggregated by income or wealth. "Percentage of rural households with adequate water for livestock, disaggregated by income/wealth categories" is an important indicator of the ability of the poor to maintain non-land income generating assets.  

*(Priya Shyamsundar, Poverty Environment Indicators, The World Bank, January 2002)*

2. **Measurement of Indicators**

The document, in addition to providing indicators, also suggests methods and sources on how these indicators can be measured. For example, the suggested indicator on food availability “rural per capita cereal production" is a direct measure of output divided by the rural population. (pp 14)

3. **Linking indicators within Pressure-State-Poverty Response (PSPR) Framework**

The document incorporates all suggested indicators in the OECDs Pressure-State-Response (PSR) model that offers a single, straightforward framework for monitoring the impact of resource degradation on the poor and identifying policy measures to stem the problems faced by them. This model, also called the Pressure-State-Poverty Response (PSPR) model, tracks the impact of pressure factors not only on natural resources but also on the poor. The following page illustrates the monitoring framework within the PSPR model for the problem of deforestation.

The first four poverty indicators operate at the village or regional level while the remaining operates at the household level. The three most important poverty indicators are i) percentage of poor households in forest rich region (regional level) ii) time spent or distance walked to collect fuel wood/water (by quintile) (at the project level) and iii) percentage of households which collect fuel wood (by quintile).

The document also suggests geo-referenced indicators for monitoring the impact of natural resource degradation on poverty and provides the example of Geo referencing for Household Survey by USAID in Africa.
Deforestation and income impacts on the poor: Indicators within the Pressure-State-Poverty-Response Framework

<table>
<thead>
<tr>
<th>Signals of pressure on forests</th>
<th>Indicators of impact on state of ...</th>
<th>Response Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forests</td>
<td>Poverty</td>
<td></td>
</tr>
<tr>
<td>Rural population growth rate</td>
<td>Rate of deforestation</td>
<td>Percentage of poor households in forest rich provinces</td>
</tr>
<tr>
<td>Rural population density</td>
<td>Total area under forest cover</td>
<td>Percentage of indigenous people in forest rich provinces</td>
</tr>
<tr>
<td>Unclear property rights</td>
<td>Rate of forest land conversion</td>
<td>Percentage of common lands available for women to collect fuel wood and NTFPS</td>
</tr>
<tr>
<td>Increased rural under- or un-employment rate</td>
<td>Number of protected areas</td>
<td>Percentage of village lands in commons</td>
</tr>
<tr>
<td>Decrease in fallow period</td>
<td></td>
<td>Distance and time to collect fuel-wood (by quintile and season)</td>
</tr>
<tr>
<td>Increase in fertilizer prices</td>
<td></td>
<td>Distance and time to collect water (by quintile and season)</td>
</tr>
<tr>
<td>Increased export of forest products</td>
<td></td>
<td>Decline in agricultural output because of use of marginal lands</td>
</tr>
<tr>
<td>Increase in timber prices</td>
<td></td>
<td>Percentage of household who collect fuel wood (by quintile) (Percentage of households who collect other forest products (by quintile) Quantity of household consumption from forest products (by quintile and season)</td>
</tr>
</tbody>
</table>

D. Conclusion

This highlights some practical indicators for establishing poverty-environment links. Most of the suggested indicators have been derived from the experience of various NRM/poverty projects. Indicators for gender issues and relations have been given due emphasis in the document. Practical illustrations, presented in boxes, underline the need and importance of indicators for poverty-environment monitoring. In borrowing these indicators organizations should take care to fit them within their respective broader frameworks. If they are not sufficiently linked to each organization’s accepted framework of action, monitoring of these indicators may not be institutionalized or may receive low priority.

*Poverty- Environment Indicators is available at IUCN library and [www.worldbank.org](http://www.worldbank.org)*
Best Resource No. 9:

Poverty and the Environment: Measuring the Links: A Study of Poverty-Environment Indicators with Case Studies from Nepal, Nicaragua and Uganda

A. Overview

Concepts of human development and environmental issues have generally tended to evolve independently of each other because they have been looked at separately. There is a need to develop indicators that reflect the relationships between them. Many country Poverty Reduction Strategy Papers (PRSPs) have not paid adequate attention to environmental issues or recognized the linkages between poverty and the environment. As a result of this asymmetry, poverty-environment indicators have not been generated.

DFID carried out a study from September 2000 to April 2001 to develop and pilot test a set of generic poverty-environment indicators for potential use in PRSPs. These indicators were developed through a review of environmental issues relevant to the poor, particularly drawing on findings from participatory poverty assessments. Draft indicators developed were tested in Nicaragua, Uganda and Nepal.

This document, which came out of the study, suggests a set of generic indicators, which have already been pre-tested in Nepal for their measurability and relevance for incorporation in PRSP. These can, therefore, be directly borrowed and applied in poverty-environment related programs in Nepal.

B. Best Elements

The study provides the following indicators:

i. Generic Poverty-Environment Indicators

Generic indicators for poverty-environment monitoring and evaluation were developed by analyzing issues arising from project plans of action and their relation to environmental factors. These indicators are relevant in the context of PRSP goal and objectives.

ii. Country Indicators

With reference to the broader generic indicators, country indicators for Nepal, Nicaragua and Uganda were developed in response to selected poverty variables. These are especially useful since they were devised to meet the needs of specific national contexts.

iii. Conceptual link between environment and poverty

The document presents a clear conceptual link between poverty and environment based on the issues explored in the course of research. This explanatory part highlights the relationship between these two dimensions and the need for identifying the right kind of indicators for the poverty reduction strategy. The document provides both the conceptual basis and the process of formulation of indicators with practical applicability in specific projects.

C. Best Elements that can be borrowed

i. Generic Poverty-Environment Indicators

These, being of a generic nature, have direct applicability and hence can be used as they are. The list of generic indicators in the document is presented below in its original form.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Suggested Poverty-Environment Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food security and ownership of or access to land</td>
<td>Proportion of the poor with secure use rights to land for farming Percentage of poor farmers with access to x hectares to grow food for household consumption</td>
</tr>
<tr>
<td>Power and Voice</td>
<td>Areas of forests co-managed by user groups with representatives of the poor Access to sanitation facilities by women</td>
</tr>
<tr>
<td>Water Security</td>
<td>Hours spent per day collecting water by women and children living in rural areas (noting seasonal variations)</td>
</tr>
<tr>
<td>Agricultural productivity</td>
<td>Percentage of poor farmers with access to sustainable irrigation</td>
</tr>
<tr>
<td>Substandard housing</td>
<td>Percentage of people living in substandard housing (rural &amp; urban figures)</td>
</tr>
</tbody>
</table>
2. **Country Indicators: Nepal**

The list of indicators suggested for Nepal after pilot-testing are as below. Since they are specific to Nepal, these indicators can be borrowed directly and adapted for specific projects.

### Poverty-Environment Indicators for Nepal

<table>
<thead>
<tr>
<th>Generic Indicators</th>
<th>Country Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Illness</strong></td>
<td>Environmental conditions of housing and neighborhood, including cleanliness and access to water</td>
</tr>
<tr>
<td>Living in environmentally fragile areas, such as arid and tropical lands with limited soil fertility</td>
<td>Resource degradation including erosion, reduced soil fertility, forestry resources, and declining availability of fresh water.</td>
</tr>
<tr>
<td>Access to non-farm sources of livelihood for the poor living in ecologically fragile areas. Access to common property resources by women, especially water, fuel-wood and NTFPs.</td>
<td>Deforestation and declining fish stocks</td>
</tr>
<tr>
<td>Natural disasters</td>
<td>Vulnerability exacerbated by living in vulnerable areas</td>
</tr>
<tr>
<td>Proportion of the poor with secure use rights to land for farming</td>
<td>Changing climatic conditions exacerbate vulnerability of countries.</td>
</tr>
<tr>
<td>Percentage of poor farmers with access to hectares to grow food for household consumption</td>
<td>Percentage of poor with own land</td>
</tr>
<tr>
<td></td>
<td>Percentage of landless poor</td>
</tr>
<tr>
<td></td>
<td>Average cultivated area of poor</td>
</tr>
<tr>
<td></td>
<td>Average area with tenancy right of the poor</td>
</tr>
<tr>
<td>Area of forests co-managed by user groups with representatives of the poor</td>
<td>Percentage of forests managed by user groups with the representatives of the poor</td>
</tr>
<tr>
<td>Access to sanitation facilities by women</td>
<td>Access to sanitation</td>
</tr>
<tr>
<td>Hours spent per day collecting water by women and children living in rural areas (noting seasonal variations)</td>
<td>Percentage of the poor with access to safe drinking water</td>
</tr>
<tr>
<td></td>
<td>Amount of time spent by the poor collecting water</td>
</tr>
<tr>
<td></td>
<td>Distance traveled by the poor to collect water</td>
</tr>
<tr>
<td>Percentage of poor farmers with access to sustainable irrigation facilities</td>
<td>Percentage of irrigated are in total cultivated area of the poor</td>
</tr>
<tr>
<td>Percentage of people living in substandard housing (rural and urban figures)</td>
<td>Percentage of poor with substandard housing</td>
</tr>
<tr>
<td></td>
<td>Average house space per household</td>
</tr>
<tr>
<td>Proportion of the health burden of the poor related to environmental factors - disease incidence related to environmental factors disaggregated by age (vulnerability of children under 5, for example)</td>
<td>Immunization coverage</td>
</tr>
<tr>
<td></td>
<td>Infant mortality rate</td>
</tr>
<tr>
<td></td>
<td>Child mortality rate</td>
</tr>
<tr>
<td></td>
<td>Maternal mortality rate</td>
</tr>
<tr>
<td></td>
<td>Use of health facilities</td>
</tr>
<tr>
<td></td>
<td>Time taken to travel to nearest health facility for the poor</td>
</tr>
<tr>
<td>Proportion of the poor living in ecologically fragile areas</td>
<td>Percentage of the poor living on marginal land such as ecologically fragile highland areas, riverside areas</td>
</tr>
<tr>
<td>Proportion of poor living in ecologically fragile areas whose main source of livelihood is agriculture (either subsistence agriculture of farm laboring)</td>
<td>Proportion of the poor living in ecologically fragile areas whose main source of livelihood is agriculture.</td>
</tr>
<tr>
<td>Access to non-farm sources of livelihood for the poor living in ecologically fragile areas</td>
<td></td>
</tr>
<tr>
<td>Hours spent per day/week collecting fuel wood by women and children in rural areas</td>
<td>Percentage of the poor using firewood, straw, thatch, cow dung, leaves, etc</td>
</tr>
<tr>
<td></td>
<td>Time spent collecting firewood by the poor</td>
</tr>
<tr>
<td>Percentage of common property land available to women for collecting fuel wood and non-timber products</td>
<td>Percentage of poor women with access to common property land for collecting fuel wood and other non-timber products.</td>
</tr>
<tr>
<td>Percentage of poor fisher folk with access to adequate fish catches</td>
<td></td>
</tr>
<tr>
<td>Percentage of the population living in areas prone to flooding</td>
<td>Percentage of poor people living in flood-prone areas</td>
</tr>
<tr>
<td>Number of poor people killed by environmentally related disaster</td>
<td>Number of deaths due to environmental disasters</td>
</tr>
<tr>
<td>Number of poor people made homeless by environmentally related disasters</td>
<td>Number of poor displaced by landslides</td>
</tr>
<tr>
<td></td>
<td>Number of poor displaced by fire</td>
</tr>
</tbody>
</table>
3. Data source and frequency of monitoring

The study relied on various data sources in the validation of its country indicators. It provides a list of these sources and frequency of monitoring required for each of the indicators and suggests whether particular kinds of information may be available from existing sources or not. Based on this information, decisions can be made by agencies as to whether they want to borrow specific indicators or not. The document also provides a list of poverty monitoring priority indicators for Uganda, which can be studied, borrowed and appropriately applied in designing monitoring systems.

D. Conclusion

These sets of indicators provide excellent scope for exploring the poverty-environment relationship and refining the monitoring system appropriately. They can help people adopt, modify and develop new indicators based on rationale and justification provided by this research. The document serves as a guide in deciding the selection of indicators, since most of the proposed indicators have already tested in the three countries. However, data availability can be a major constraint in the measurement of the indicators. While pilot testing these indicators, data on access to land, co-management of forests, housing and environmentally related natural disasters was available. But date measuring other aspects, such as dependence on ecologically fragile land, was not available. Therefore, data availability for selected indicators should be an important criterion in deciding the choice of indicators from this list.

_Poverty and the Environment: Measuring the Links_ is available at IUCN library and [www.dfid.gov.uk](http://www.dfid.gov.uk)
The Why and How of Gender Sensitive Indicators

A. Overview
This is project level handbook and guide on Gender Sensitive Indicators developed for the Canadian International Development Agency by Dr. Tony Beck of the Institute for Asian Studies at the University of British Columbia and Dr. Morton Stelcner of Concordia University’s Department of Economics after 14 months of research. Both the guide and handbook focus on the need for gender sensitive indicators at the country and project level and prescribe techniques for the formulation of qualitative and quantitative indicators. The guide focuses on the linkages of the indicators with stated project objectives, provides definitions and differentiates qualitative and quantitative indicators by giving practical examples from various sectors. The handbook focuses more on the selection of indicators at the project level, furnishing practical examples by way of illustration.

The guidebook is one of the first of its kind, providing a list of gender sensitive indicators along with the justifications for them and the rationale influencing their selection. It also focuses on the technical aspects of their development and selection. Four projects were assessed in the course of developing the gender-sensitive indicators. These include agriculture training in Bangladesh, women’s empowerment programme, work and labour force participation in Egypt and water supply and sanitation in Honduras.

B. Best Elements
The document explains the concept of gender sensitivity and provides the rationale for developing gender sensitive indicators. It provides techniques for selecting indicators, categories of indicators, types of indicators and a list of indicators for the macro level and for the project level.

The guide provides qualitative and quantitative indicators to measure participation and provides technical guidance on this issue. The project level indicators are linked to the country level indicators. Examples of projects which have been successful in selecting the right indicators and those projects which have failed to do so are useful in term of the implications for the stated project objectives.

C. Best Elements that can be borrowed
i. Rationale for Gender Sensitive Indicators
The rationale provided in the guide for gender sensitive indicators in the planning, monitoring and evaluation of programs can be used by agencies for advocating the use of gender sensitive indicators in projects supported by them.

ii. Selection of qualitative and quantitative indicators
The definition, rationale and strategies for the selection of qualitative and quantitative indicators can be used for incorporating gender agendas at the project level and ensuring that gender performance can be captured in measurable terms on the basis of adequate, necessary, timely and relevant information. The calibration of a project’s gender sensitivity requires quantification of relevant gender related information.

Definition of qualitative and quantitative indicators
- **quantitative indicators** can be defined as measures of quantity, such as the number of people who own sewing machines in the village.
- **qualitative indicators** can be defined as people’s judgment and perceptions about a subject, such as the confidence those people have in sewing machines as instruments of financial independence.
iii. **Indicator types**
The elaboration of the two indicator types in the document is of particular use in project and program design. Type 1 indicators are quantitative indicators whose results are relatively easily quantifiable. Type 2 indicators are qualitative and whose results are less susceptible to quantification as they typically concern social processes which can only be evaluated through qualitative analysis.

**Examples of Type 1 and Type 2 Indicators**
- Raising the participation of women in FUG by 50% in x District over 5 years (Type 1)
- Increasing poor women's decision-making ability in FUG by 50% over 5 year (Type 2)

iv. **Checklist**
The checklist for the selection of indicators is useful for project level design. The list is as follows:

**Criteria for the selection of indicators**
- Indicators should be developed in a participatory fashion including all stakeholders wherever possible
- Indicators must be relevant to the needs of the user, and at a level that the user can understand.
- All indicators should be sex-disaggregated
- Both qualitative and quantitative indicators should be used
- Indicators should be easy to use and understand
- Indicators must be clearly defined
- The number chosen should be small. A rule of thumb is that up to six indicators can be chosen for each type of indicator (input-outcome)
- Indicators should be technically sound
- Indicators should measure trends over time
- The ultimate focus should be on outcome indicators.

v. **Successful and unsuccessful examples of project in identification of right indicators:**
Examples of projects which have succeeded and failed on this count, the description of methodological problems in the identification of appropriate indicators and the recommendations on the appropriate type of indicator for each given objective of the project are all extremely useful at the generic level in developing monitoring systems. The guide suggests the following indicators (next page in a box) for the water supply and sanitation project in Honduras.

D. **Conclusion**
This guide and field level handbook is a very useful resource for identifying gender sensitive indicators. The various steps involved in indicator selection, the criteria to be applied, the indicator categories and types are clearly explained and therefore easy to grasp. Practical examples drawn from various projects help clarify the need for selecting appropriate indicators. This is an innovative document that can contribute to projects in poor countries and is of particular use in orienting the staff and gender focal persons in organization towards more gender sensitive objectives.

*The Why and How of Gender-Sensitive Indicators* is available at at IUCN Library and [www.acdi-cida.gc.ca/index_e.htm](http://www.acdi-cida.gc.ca/index_e.htm)
Indicators for the water supply and sanitation project in Honduras

**Gender Sensitive Indicators for Water Supply and Sanitation Programme**

**Input Indicators:**
Number of technical personnel by sex (engineers, administrators and support staff); managers and coordinators (construction, education, watershed); educators and promoters (6 men and 6 women); coordinators for women's groups; building and office facilities; vehicles; office equipment; educational material and facilities; construction equipment and materials.
Amount of funding.

**Process Indicators**
Improvement in water quality measured by changes in coliform levels.
Provision of potable water measured in project documentation by the number of communities affected (e.g. gallons/person/day).
Percentage of beneficiaries who store drinking water in covered containers, by sex.
Percentage of beneficiaries who use and maintain constructed latrines, by sex.
Provision of materials (e.g. wood, bricks, stones); skilled and unskilled labor, financial support; advice on appropriate location and technologies of facilities (e.g. pit and pour, pour flush latrines) and environmental/agricultural land-use conflicts.
Percentage (or number of women involved in supervisory, construction, data collection, and maintenance and operation activities.
Representation of women on water management and village development committees.
The percentage of local leaders who are women.
Percentage of women attending training sessions.
Women's involvement in non-traditional activities such as collection of construction materials, digging and filling trenches, public relations (fund raising, advertising), local leadership and attendance at training.
Role of watersheds and inter-relationships among watersheds, water supply, latrines, and health and hygiene; emphasis placed on women and children.
Proper use and cleaning of latrines, house cleaning, and personal hygiene.

**Output Indicators**
Facilities (micro-watersheds, water systems, latrines) completed.
Continuing levels of community and women's participation in local organizations.
REFERENCES

Aguilar, Lorena et. al, (2002), In Search of the Lost Gender, Equity in Protected Areas, IUCN.


FAO, (1990), The Community’s Toolbox: The idea, methods and tools for participatory assessment, monitoring and evaluation in Community Forestry, Rome, Italy.


World Food Programme, (2003), Natural Resource Management and Livelihoods: From Policy to Practice, WFP/DFID
Volume Two: Annotated Bibliography
MONITORING GENDER, POVERTY AND SOCIAL EQUITY IN NATURAL RESOURCE MANAGEMENT
<table>
<thead>
<tr>
<th>CLASSIFICATION:</th>
<th>No. 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion paper</td>
<td>Dimension of social equity: Poverty</td>
</tr>
<tr>
<td>Manual/guideline</td>
<td>Geographical area: Brazil and Asia</td>
</tr>
<tr>
<td>Case study</td>
<td>NRM sector: Environment</td>
</tr>
</tbody>
</table>

**Title:** Changing Views on Change: Participatory Approaches to Monitoring the Environment

**Author(s):** Joanne Abbot and Irene Guijt

**Publisher/institution:** SARL

**Date:** July 1998  **Pages:** 96

**Available at:** [www.particenvtalmonitoring.pdf](http://www.particenvtalmonitoring.pdf)

**IUCN Library, Bakhundole, Lalitpur, Kathmandu**  
**E-mail:** library@iucn.org.np  **Tel:** +977 1 5528761, 5528781

**Summary:**

This discussion paper reviews participatory approaches to monitor environmental change. It draws on published literature, interviews with practitioners and the practical experiences of a research project on the monitoring of sustainable agriculture in Brazil. The authors focus on the use of monitoring approaches in the context of tracking environmental change in general and of projects focusing on environmental regeneration. This paper discusses various project-led approaches to participatory monitoring of the environment and other approaches to noting, recording and monitoring change which are initiated within and by community members.

This discussion paper outlines key steps in indicator-based participatory monitoring and describes three categories of approaches to participatory environmental monitoring that seem to have been successful in providing a basis for community involvement. These are: 1) methodologies developed from the use of participatory rural appraisal (PRA) 2.) oral testimony, and 3.) ecological methods.

The annex describes ten case studies of participatory monitoring of the environment.

**Keywords:** approach, monitoring, methodologies

**Call no:** RA10.240  
**Language:** English
Title: *In Search of the Lost Gender (Equity in Protected Areas)*

Author(s): Loren Aguilar, Itza Castaneda, Hilda Salazar with the collaboration of Guiselle Rodriquer and Jackeline Siles

Publisher/institution: The World Conservation Union (IUCN)

Date: February 2002  Pages: 224

Available at: [www.generoyambiente.org/ES/publications_uicn/moduloapi/moduloapi.htm](www.generoyambiente.org/ES/publications_uicn/moduloapi/moduloapi.htm)

IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail: library@iucn.org.np  Tel: +977 1 5528761, 5528781

Summary:

This document is a conceptual and methodological proposal that provides tools, techniques and recommendations to build processes to promote gender equity perspectives in protected areas. It was validated in three countries—Costa Rica, Mexico and Kenya. This document was developed to facilitate protected areas planning, management and administration to seek greater social equity, particular among men and women. It is expected to be useful to governmental and non-governmental institutions, academic organizations or institution focusing on the social sector that are interested in promoting gender equity.

The methods and tools (pg. 71-113) presented may be applied in different situations during the implementation of conservation initiatives within the protected area. Some methodological tools are also useful for the purposes of field application.

The document provides detailed guidelines on the implementation of gender-sensitive monitoring and evaluation systems for the effective management of protected areas together with examples of gender-sensitive indicators. It also incorporates a useful directory of literature on gender and protected natural areas and suggests areas and aspects that require further exploration. This document has been discussed in detail as a best resource document in Volume 1 (Best Practices) of this bibliography.

Keywords: methodology, tools, indicators, monitoring, evaluation

Call no: RB41.080  Language: English
Summary:

This paper deals with the practical application of the Sustainable Livelihood (SL) approach to NRM. It reviews the different uses of this approach in four projects (three from Namibia and one from Kenya) and incorporates the lessons learnt from them. The four projects are: i) participatory planning of Wildlife Integration for Livelihood Diversification—Namibia, ii) assessment of the impact of tourism on rural livelihoods—Namibia, iii) review of the livelihood strategies of households in Caprivi and its implications for the Community Based Natural Resource Management Program—Namibia, and iv) assessment of the economic and livelihood impact of wildlife enterprises in Kenya. The analysis of the application of this approach in these projects highlights three distinct benefits: i) understanding people’s livelihoods and incorporating that knowledge into the implementation of projects, ii) the methods employed in livelihood analysis, and iii) the ways in which the livelihoods approach was developed, shared and used.

The document also lists the advantages and disadvantages of the livelihoods approach and analysis, which will of be use in guiding development organizations and professionals make appropriate choices for specific projects.

Keywords: approaches, analysis, methods
Summary:

This report is a synthesis of the material prepared by BRIDGE at the Institute of Development Studies. It provides a detailed analysis of poverty trends, poverty measurement, and the relevance of households and labor markets for gender and poverty issues. This is a useful resource in formulating development policy, planning and implementation, as well as for research, oriented towards exploring the gendered nature of poverty and poverty processes in order to develop gender-sensitive approaches to addressing poverty and promoting sustainable livelihoods.

The paper argues that composite indicators, such as gender-disparity adjusted HDI, and single indicators of female well-being at aggregated levels show a weak association with overall measures of both economic progress and human welfare. The relationship between gender discrimination and poverty processes, therefore, merits more detailed investigation and analysis. The paper suggests: i) the need for more attention to gender-disaggregated data collection in large-scale household surveys, specially focusing on allocation of labor, other productive resources, assets, claims and incomes, ii) the development of gender–sensitive participatory methodologies and gender-aware approaches to project level poverty monitoring, and iii) more detailed and systematic data on the work hours, income sources, expenditure patterns, assets and claims of different types of households, both male- and female-headed, and exploratory methods to understand the relationship between gender and poverty in a better way.

A strong focus of the paper is to develop an understanding of the methodological issues in studies on poverty and female headship. These methodological issues are explored in Appendix 1 and Appendix 2 of the document, which summarize selected empirical studies of female headship and poverty. The paper also includes a practical example of gender and poverty in Ghana. A list of selected, current research on poverty and gender is also included in the Appendix. This resource is very useful for a deeper understanding of the relationship between gender and poverty.

Key words: gender analysis, methodology, framework

Call no: UG00.079  Language: English
Title: Gender Equality for Sustainable Agriculture Development: Practical Manual

Author(s): Bijaya Bajracharya, Padmasana Sakya, Jyoti Aryal and Chabilal Poudyal

Publisher/institution: Sustainable Soil Management Program (SSMP)

Date: 2000 Pages: 111

Available at: Sustainable Soil Management Program (SSMP) Tel: +977 1 5521377
E-mail: psussmp@wlink.com.np

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np Tel: +977 1 5528761, 5528781

Summary:

This manual is a guide for community training in understanding the concept of gender equality for sustainable agricultural development. Chapter I explains the process of the manual preparations and the importance of gender equality in agricultural programs. Chapter II lists series of participatory tools and the procedures of their application, supported by practical examples and case illustrations. Participatory tools such as time-line analysis, Venn diagram, problem tree analysis and activity profiles and their gender sensitive application are presented in pictorial form. Chapter III provides information on efforts that have been made to help trainees and communities understand the consequences of access, control and benefit sharing between men and women. It also describes four instances where gender equality was successfully incorporated resulting in a positive effects on access, control and benefit sharing between men and women.

This manual is particularly important for those interested in the integration of the gender dimension into existing participatory tools. The tools presented in the manual are also useful in developing monitoring and evaluation strategies. The examples of success can be included in training material. Diagrammatic and pictorial representation makes it a user-friendly document that is ideal for training.

Key Words: tools, methods

Call no: UG00.078 Language: Nepali
Title:  Guide to Gender- Sensitive Indicators

Author(s): Dr. Tony Beck and Dr. Morton Stelcner

Publisher/institution: Canadian International Development Agency (CIDA)

Date: August 1997  Pages: 92

Available at: www.cida.gc.ca

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np  Tel: +977 1 5528761, 5528781

Summary:

This guide explains why gender-sensitive indicators are useful for measuring the results of the Canadian International Development Agency’s (CIDA) development initiatives. It concentrates on projects with an end user-focus and shows how gender-sensitive indicators can and should be used in both integrated and WID (women in development)-specific projects in combination with evaluation techniques. The main aim of this guide is to promote conceptual and methodological understanding of indicators, with special emphasis on gender-sensitive indicators. It also offers suggestions and guidance for the use of gender-sensitive indicators in projects with end-user focus. Since this guide is aimed at the project level, it is of particular use to agencies keen on strengthening the women in development and gender equity evaluation components of their projects.

The guide also provides a comprehensive bibliography assist the reader explore the conceptual and practical aspects of indicators in greater depth and detail.

The guide has annexes listing different examples of the use and application of the indicators. Though the document does not directly focus on natural resource management indicators, its comprehensiveness and range make it a very useful guide for agencies and personnel in Natural Resource Management to develop appropriate and realistic indicators. This resource has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.

Keywords: indicators, methodologies, tools

Call no: UG10.023  Language: English
CLASSIFICATION:  No. 7

----------...Discussion paper
......Manual/guideline
..........Case study

Dimension of social equity: Gender
Geographical area:
NRM sector: General

Title: The Why and How of Gender-Sensitive Indicators
       A Project Level Handbook

Author(s): Dr. Tony Beck and Dr. Morton Stelcner

Publisher/institution: Canadian International Development Agency (CIDA)

Date: August 1997   Pages: 28

Available at: www.cida.gc.ca

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np   Tel: +977 1 5528761, 5528781

Summary:

This handbook reviews the main approaches in the use of gender-sensitive indicators and recommends criteria in determining the choice of indicators to be applied. This handbook concentrates on gender integrated and women in development projects that focus on end users/stakeholders. It also presents specific ways of developing qualitative and quantitative indicators.

For a brief document it covers a lot of important conceptual ground. It provides the rationale for why gender-sensitive indicators are important. It also focuses on developing the indicator work plan (identifying objectives, identifying external factors as potential risks/enabling features, deciding which types of indicators are appropriate and over what timeframe, developing qualitative analysis, etc.). Though the document concentrates on education projects in providing guidelines for choosing indicators, it nevertheless lends itself to adaptation in NRM projects. The handbook also incorporates a summary of guidelines and checklists to be used in developing gender-sensitive indicators. This resource has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.

Keywords: indicators

Call no: UG10.011   Language: English
**CLASSIFICATION:**

<table>
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<th>Dimension of social equity:</th>
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</thead>
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<td>Geographical area:</td>
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<td>Environment</td>
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**Title:**  Developing Baseline Gender Indicators and Analysis for Country Program Planning  
A Resource Guide

**Author(s):** Tony Beck with assistance from Helen Thomas and Laura Harries

**Publisher/institution:** Asia Branch, Canadian International Development Agency (CIDA)

**Date:**  October 1995  
**Pages:**  80

**Available at:**  IUCN Library, Bakhundole, Lalitpur, Kathmandu  
**E-mail:** library@iucn.org.np  
**Tel:**  +977 1 5528761, 5528781

**Summary:**

This guide is intended to assist the CIDA Asia Branch to identify key gender equity issues, highlighting priorities for programming initiatives and measuring results at the country level. It provides a sample menu of gender indicators (Annex A) that can be used to establish country-level base-line gender disaggregated data on the status of women, which will facilitate project-specific gender analysis.

The document deals with the development of a set of clear priorities and a sound information base at the country level, through the use of baseline gender-sensitive indicators and gender analysis. The use of such indicators and analysis is expected to improve effectiveness through better planning.

Through examples the document also explains the nature of and distinction between quantitative and qualitative indicators, and includes checklists for the choice and use of gender indicators. Attention is particularly directed to Table 3.13, which lists indicators that illustrate how the environment affects gender roles as well as how gender affects environment. This guide is a very useful reference in developing gender indicators in natural resource management.

**Keywords:** indicators, analysis

**Call no:**  UG10.021  
**Language:**  English
**CLASSIFICATION:**

<table>
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<td>Geographical area: Nepal</td>
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</table>

**Title:** Assessment of the Role of Women in Water Resource Use in the Annapurna Conservation Area

**Author(s):** Chandra Bhadra and Bhaskar Singh Karky

**Publisher/institution:** King Mahendra Trust for Nature Conservation (KMTNC)

**Date:** December 2002  
**Pages:** 47

**Available at:** King Mahendra Trust for Nature Conservation (KMTNC)  
**E-mail:** info@kmtnc.org.np  
**Tel:** +977-1- 5526571, 5526570

**Summary:**

This research study assesses the role of women in water resource use in the Annapurna Conservation Area to better understanding the function and potential of women in resources use and management with a view to improving the gender balance as between women and men in the future.

The document enumerates and explains the tools and techniques used for data collection (complementary use qualitative and quantitative methods, gender analysis techniques, drudgery graphing), the sampling framework, statistics used for gender analysis (cross- tabulation, t-test and correlation) and the conceptual framework (Figure 1).

The document also puts out its research results in terms of the analyzed data, the summary of findings and interpretation. Since the document is the outcome of action research it recommends strategies and action that can be implemented to further enhance the position of the women as beneficiaries, participants and agents in water resource use and management.

This document not only provides an in-depth analysis of socio-economic aspects, it is also helpful for developing and refining monitoring indicators.

**Key words:** tools, indicators

**Call no:** RB71.040  
**Language:** English
Summary:

This case study analysis is presented in two volumes. Volume I contains the policy and institutional analysis of organizations involved in the Dolakha Ramechhap Community Forestry Development Project (DRCFDP). Gender perspectives and recommendations are also included in this volume. Volume II consists of the Annexure, with analyses of the data collected at the two field sites, and with institutions. The summary of analysis generated from the data provided in Volume II has been incorporated in Volume I. For that reason, two volumes should be reviewed together for a better understanding of the analytical process.

Volume I (page 98) provides a checklist for monitoring forestry projects to establish their level of gender sensitivity. Several gender analysis tools and methods have been listed in volume II with practical examples of their application in DRCFDP. Rather than focusing on the theoretical aspects of the tools and methods used for gender analysis, the document demonstrates their practical application in community forestry interventions. Further, analysis of the information generated is used for drawing conclusions and recommendations. For this reason, the document is useful for further guiding the analysis of information generated from the application of qualitative methods and tools. This document is one of the best examples of the lucid descriptions of qualitative methods for monitoring and evaluation.

Key words: analysis, methodology, checklist, monitoring, methods, framework

Call no: UG00.072  Language: English
Title: Project Cycle Management Technical Guide - SEAGA (Socio-Economic and Gender Analysis Programme)

Author(s): Clare Bishop in collaboration with the Socio-economic and Gender Analysis (SEAGA) Programme

Publisher/institution: Food and Agricultural Organization (FAO) of the United Nations

Date: 2001 Pages: 104

Available at: www.fao.org/sd/SEAGA

Summary:

The main purpose of this manual is to create a new synergy by bringing together project management practices and socio-economic gender issues within the conceptual framework of SEAGA. This exercise draws on existing theoretical perspectives and methods, including project management, the logical framework, rapid appraisal techniques, participatory approaches, gender analysis and stakeholder identification. This manual is useful for practitioners at the operational level in government, non-government organizations, civil society organizations and the private sector.

The structure of the manual is based on key project cycle: project identification, project design, project appraisal, proposal preparation and monitoring and evaluation. In each section, various concepts and techniques are discussed prior to demonstrating their practical application, with examples based on three case studies developed from field experience in Eastern Africa. The document also provides checklists and procedures (reviewing of primary data and identification of information needs, collection of primary data and findings and recommendations) for project monitoring and evaluation. The tools and methods provided in this guide are useful in informing the cycle of the natural resource management projects and initiatives.

Keywords: approaches, framework, tools, monitoring, evaluation

Call no: PD54.001 Language: English
**Title:** The Community’s Toolbox: The Idea, Methods and Tools for Participatory Assessment, Monitoring and Evaluation in Community Forestry

**Author(s):** D’Arcy Davis Case

**Publisher/institution:** Food and Agricultural Organization (FAO) of the United Nations

**Date:** 1990 **Pages:** 159

**Available at:** [www.fao.org/docrep/X5307E/x5307e00.htm](http://www.fao.org/docrep/X5307E/x5307e00.htm)

**Summary:**

This manual focuses on the methods and tools for participatory assessment, monitoring and evaluation in community forestry. The manual modifies and adapts many of the traditional monitoring and evaluations methods and tools to make them more participatory. The community toolbox lists and describes these participatory methods and tools (group meetings, open ended stories, participatory action research, farmer’s own record, nursery records, popular theatre etc.), which are of use both to field personnel and to community participants. The methods and tools can be appropriately adapted for monitoring and evaluating the gender, poverty and social equity dimensions of NRM initiatives.

The manual consists of three sections. Section one introduces the new approach and the benefits to be gained from its application. This section also provides some two-way communication exercises for field personnel. Section two provides the methods (participatory assessment, participatory monitoring, participatory evaluation, information analysis) for determining information and the ways in which the information can be analyzed and presented. Section three describes the information collecting tools and offers some suggestions for the selection of appropriate tools. Since the manual can potentially be used by field staff in many countries across the world, it provides simple explanatory diagrams that enables users, irrespective of culture or nationality, to better understand the concepts. This resource has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.

**Keywords:** methods, tools, monitoring, evaluation

**Call no:** PB100.007 **Language:** English
Title:  A Gender Analysis of Women’s Participation in Community Forestry

Author(s): Gyanu Chhetri and Sita Rana

Publisher/institution: Nepal Australia Community Forestry Project, Kathmandu, Nepal

Date: 1995  Pages: 16

Available at: Nepal Australia Community Forestry Project (NACFP)
E-mail: info@nacfp.wlink.com.np  Tel: +997 1 5551704

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np  Tel: +977 1 5528761, 5528781

Summary:

This discussion paper uses a case study approach to examine issues related to women’s participation in community forestry development in Sindhu Palchok and Kavre Palanchok districts of Nepal. It focuses on the extent of women’s participation in and benefits received from community forestry and examines the decision-making processes in community forestry. It also reviews the role of the Department of Forests (DoF) staff in involving women in community forestry. Altogether, six Forest User Groups from four sites were studied.

The paper summarizes the level and conditions of women’s participation in community forestry and recommends measures that will help improve the scale and quality of participation in forestry projects.

This is a useful resource both for planning projects and designing monitoring frameworks.

Key Words: analysis

Call no: UG00.070  Language: English
Title: *Linking Policy Interventions and Livelihood Impacts— Identifying Potential Livelihood Indicators*

Author(s): Matthew Chadwick, Oliver Springate-Baginski, John Soussan and Piers Blaikie

Publisher/institution: Livelihood-Policy Relationships in South Asia

Date: Undated

Pages: 29

Available at: [www.york.ac.uk/inst/sei/prp/pdfdocs/working_paper_5_indicators_220903.pdf](http://www.york.ac.uk/inst/sei/prp/pdfdocs/working_paper_5_indicators_220903.pdf)

Summary:

This paper primarily aims to stimulate discussion on indicators and their use in relation to sustainable livelihoods (SL). Defining the term indicator and the key features of good indicators, the paper then proceeds to develop a conceptual framework for employing indicators as tools to assess the livelihood impacts of natural resource management policies. Using the SL framework, it also examines the role of indicators in the assessment of policies and projects and outlines an approach for the identification of sustainable indicators by linking the project’s policy process model with the sustainable livelihoods model. The approach is illustrated with case studies from Nepal and Bangladesh.

Keywords: indicators, framework, model

Call no: GA00.058

Language: English
This paper compiles various resources, including research output, in the area of natural resource management. Three types of expertise have been considered in this paper: i) expertise in common pool resources, ii) PRA and iii) livelihood analysis. The paper explains the concept of common pool resources, the rationale for its use being itself a research theme.

The paper is an effective guide to available common pool of resources. Thus, it provides information on where to find expertise on livelihood analysis, on the application of sustainable livelihoods framework, or on the application of participatory methods. In addition, it also provides information on which methods were applied, where they were applied, and what the outcomes were. It also includes descriptions of several PRA tools accompanied by diagrammatic illustrations and case studies.

The document is particularly important for those interested in learning more about the concept of common pool resources and the application of PRA for research and analysis. Its bibliography is also very useful.

**Key Words:** tools, analysis, methods
Title:  *Training Resource Book on Gender Implications in Farming System Approach*

Author(s):  P. Das, S.K. Dais, D. Basu and R.P. Singh ‘Ratan’

Publisher/institution:  National Research Centre for Women in Agriculture  
Indian Council of Agriculture Research (ICAR)  
93 Dharma Vihar, Khandagagiri - P.O. Bhubaneswar - 751 030

Date:  July 1996  
Pages:  88

Available at:  ICIMOD Library, Kathmandu  
E-mail:  rathapa@icimod.org.np  
Tel:  +977 1 5525313

IUCN Library, Bakhundole, Lalitpur, Kathmandu  
E-mail:  library@iucn.org.np  
Tel:  +977 1 5528761, 5528781

Summary:

This training resource focuses largely on the gender implications of the farming system approach with the objective of enhancing the capability of development practitioners develop research and extension as well as policy agenda for addressing gender issues and other related social concerns within the farming system approach.

The manual includes gender focused agro-eco-system analysis, which includes the dimensions and steps in the analysis of agro-ecosystem. PRA tools (map, transect, wealth ranking, seasonal ranking, flow diagram, matrix ranking, decision tree, decision matrix, venn Diagram etc) have been used for pattern analysis. The gender analysis framework, which helps in project formulation by promoting efficiency, equity and sustainability, is also discussed. Though this manual does not directly focus on monitoring indicators for gender in farming systems, it can be used as a guide to develop monitoring indicators using the different frameworks and matrices that are presented in it. It also contains practical examples illustrating how analysis of agro-ecosystem can be conducted.

Key Words:  tools, analysis, framework

Call no:  UG00.073  
Language:  English
This guide, describing the Methodology for Participatory Assessment (MPA), is a practical tool for developing sustainable services to the poor through the use of participatory methods. Though the document deals with integrating gender and poverty issues in sustainability assessments of community drinking water and sanitation initiatives, the principles and the approach are applicable to participatory initiatives in other areas too.

This guide presents the analytical framework and sustainability indicators. These indicators can also be used as criteria for designing demand-responsive services. Though the MPA was developed to monitor sustainability in completed projects, it has the potential to help introduce gender and poverty sensitive participation into all phases of large investment projects.

This guide is successful in pulling together key social and sustainability indicators into a single, user-friendly tool. This resource has been discussed in detail in Volume 1 (Best Practices) of the bibliography.
Summary:

This paper documents the monitoring system of SNV Nepal and describes the different levels of objectives and the different levels of monitoring as well as their linkages. The attributes and characteristics of these Indicators along with their shortcomings are also discussed.

The document suggests areas for revision in the existing log-frame of SNV. The analysis of each indicator is accompanied by a description of whether it is measurable or not, how frequently data needs to be collected for measurable indicators, the required data collection mechanism and the allocation of responsibility for the collection of information. Though the manual is specifically about the SNV monitoring system, the analysis of indicators and the recommended suggestions to overcome shortcomings are useful pointers for other organizations to dissect and diagnose their own monitoring mechanisms.

Key Words: indicators, methods

Call no: PA00.008

Language: English
This module provides concrete suggestions and recommendations for incorporating gender equity perspectives into every stage of the project cycle. In this sense, it can be used both at the beginning of the implementing and when changes are being introduced in processes that have already begun.

The module suggests processes to be followed to construct gender equity indicators. It discusses important issues like definitions of indicators, their importance, the ways to construct good indicators, gender indicators and their uses and the variables involved in the process of constructing them. The key suggestions for rural development initiatives can be incorporated into the activities of projects to promote gender equity. This module provides the methodology and steps for a definitive system of gender equity indicators for rural development initiatives.

The document is useful for development projects to learn more about how to construct gender equity indicators and the suggested indicators (p 83) will help in the assessment of the progress of gender equity within projects.

Keywords: indicators
**CLASSIFICATION:**

| Discussion paper | Dimension of social equity: **Gender and Poverty** |
| Manual/guideline | Geographical area: **Agriculture** |
| Case study | NRM sector: **Agriculture** |

**Title:** Macro Level Handbook - SEAGA - Socio-Economic and Gender Analysis Programme Gender Analysis in Macroeconomic and Agricultural Sector Policies and Programmes

**Author(s):** Barbara Evers and Jane Harrigan in collaboration with the Socio-economic and Gender Analysis (SEAGA) Programme, Gender and Population Division and Policy Assistance Division

**Publisher/institution:** Food and Agricultural Organization (FAO) of the United Nations

**Date:** 2003 **Pages:** 105

**Available at:** [www.fao.org/sd/SEAGA](http://www.fao.org/sd/SEAGA)

**IUCN Library, Bakhundole, Lalitpur, Kathmandu**

**E-mail:** library@iucn.org.np **Tel:** +977 1 5528761, 5528781

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**Summary:**

The aim of this handbook is to help agricultural policy makers and planners in the developing countries and FAO staff to understand why and how gender considerations should be incorporated into their work. It updates them on theoretical developments as well as gives practical guidance on how to integrate gender into policy and sector work. The handbook illustrates through the use of the macro-meso-micro framework the relevance of gender in policy from both the efficiency and equity points of view.

The document uses examples to demonstrate how to mainstream gender analysis in agricultural sector policies and programs through institutional analysis, baseline gender analysis, budgeting, monitoring and evaluation. It provides references and information on additional resources to support further work and more in-depth treatment of policy issues when conducting policy and capacity building work at the country level.

The handbook provides suggestions on how to monitor gender objectives in agricultural programs by linking inputs to outputs, impacts, outcomes and program goals, the types of quantitative and qualitative indicators necessary to monitor gender objectives in agricultural programs and how to build support for better monitoring and evaluation (p 94)

This document is useful to officials, trainers and development agents involved in agricultural policy-making, agricultural planning and programs.

**Keywords:** framework, indicators, analysis, monitoring, evaluation

**Call no:** UG00.086 **Language:** English
Title: Integrating a Gender Dimension into Monitoring & Evaluation of Rural Development Projects

Author(s): Lucia Fort, B.L. Mattinez and Madhuchhanda Mukhopadhyay

Publisher/institution: The World Bank

Date: 2001 Pages: 12

Available at: www.worldbank.org/gender

Summary:

This toolkit for integrating gender into monitoring and evaluation has been developed to assist project task teams and partners to recognize and address gender concerns in designing rural development sector projects. It also provides guidelines to monitor the progress in gender integration during implementation and to evaluate its impact in achieving overall rural well-being.

The toolkit explains why it is necessary to integrate gender into rural development projects and into monitoring and evaluation. It describes why and how to integrate gender into monitoring and evaluation. Figure 1 (p 3) presents the levels of gender integration into projects, ranging from project identification to project goals. It also focuses on participatory monitoring and evaluation, providing checklists and indicators.

Annex 1 presents gender integration in a typical rural development project (narrative summary, gender sensitive performance indicators, monitoring and evaluation, data source, assumptions). It also incorporates key questions to ask when "engendering" the project design summary. Annex 2 presents suggested data collection and analysis methods for rural development projects. Annex 3 presents a rural score card for assessing rural well-being through a gender lens which focuses on indicators that can be used to measure progress in achieving the overall goal of rural well-being. This toolkit is useful in designing NRM projects.

Keywords: monitoring, evaluation, indicators, checklist
**Summary:**

This guide for project Monitoring & Evaluation (M&E) has been prepared to help project managers and M&E staff to improve the quality of M&E in IFAD supported projects. The guide focuses on how M&E can support project management and engage project stakeholders in understanding project progress, learning from achievements and problems, and agreeing on how to improve both strategy and operations. This guide also provides comprehensive advice on how to set up and implement an M&E system together with background ideas that underpin the suggestions.

The document is divided into eight sections and they are aimed at addressing the needs and concerns of four levels of stakeholders, i.e. project managers, M&E staff, consultants and IFAD coordinating staff. Section 1 is the introductory chapter and explains how the guide can be used. Section 2 discusses how M&E can be used to manage projects in order to maximize their impact on poverty reduction. Section 3 is about linking project design, annual planning and M&E and identifies areas where adequate attention to the M&E system needs to be paid. Section 4 is about setting up the M&E system and section 5 is about identifying who needs what information for what purposes in a successful M&E system. Section 6 provides guidelines for gathering, managing and communicating information and section 7 points to areas for building capacity in M&E. Section 8 explains critical elements required for reflecting critically to improve action.

The glossary of M&E concepts and terms, annotated examples of the project Log Frame Matrix, methods for monitoring and evaluation and a list of relevant resources are also included in the annexes that give deeper insights into M&E systems. This document has been elaborated in detail in Volume 1 (Best Practices) of the bibliography.

**Key words:** matrix, indicators, monitoring, evaluation, methods
Title:  **Status Monitoring of Service Providers (NGOs/CBOs) involved in Community Forestry Programme**

Author(s):  B.D. Gurung

Publisher/Institution:  Nepal Swiss Community Forestry Project (NSCFP)

Date:  April, 2001  Pages:  16

Available at:  SDC, Kathmandu

E-mail:  kathmandu@sdc.net  Tel:  977-1-5524927

IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail:  library@iucn.org.np  Tel:  +977 1 5528761, 5528781

Summary:

This documents outlines the findings of the status monitoring of non-governmental organizations/community based organizations (NGOs/CBOs) who are partners in the Nepal Swiss Community Forestry Project (NSCFP). Among one of NSCFP’s aim was to pilot test the assessment approach in Dolakha district for later replication in other NSCFP districts.

The document evaluates and categorizes the local service providers of Dolakha district and incorporates a matrix with criteria for ranking them. The matrix has four dimensions of institutional measurement. A set of indicators, applicable in any institutional analysis, has been provided under each dimension. The four dimensions specified in the document are: i) institutional strength, ii) work performance, iii) sustainability, and iv) networking. These dimensions can be adopted by other agencies for monitoring of community based organizations.

The strength of the matrix employed by the document is that it is a self assessment tool using which concerned stakeholders can involve themselves in process of evaluation and come to appropriate conclusions about whether they fulfill the necessary criteria set by NSCFP for potential project partnership. Use of this tool can also enable stakeholders identify areas for further improvement so as to attain eligibility for NSCFP partnership.

Key Words:  indicators, matrix, analysis, approach, monitoring, evaluation

Call no:  GE31.065  Language:  English
**CLASSIFICATION:**

- Discussion paper
- Manual/guideline
- Case study

Dimension of social equity: Poverty
Geographical area: Poverty
NRM sector: Environment

**Title:** Guidelines for Impact Monitoring

**Author(s):** Karl Herweg (CDE), Kurt Steiner (GTZ) Loep Slaats (KITS)

**Publisher/institution:** Unpublished

**Date:** NA  Pages: 180

**Available at:** IUCN Library, Bakhundole, Lalitpur, Kathmandu  
E-mail: library@iucn.org.np  Tel: +977 1 5528761, 5528781

**Summary:**

The main aim of this guideline is to make impact monitoring easier by providing introductory literature, methodologies and tools and suggests options for low-cost and relatively low-tech monitoring methods. The document is designed to ensure ease of access to and use of information, transparency of user-guidance and coherence of presentation. The guideline is useful for program and project coordinators and managers in initiating monitoring procedures, selecting indicators and methods, assessing results, organizing user-oriented outputs, presentation and dissemination and devising the system for the storage of information gathered from the impact-monitoring of sustainable land management.

The guide outlines a seven-step monitoring procedure and provides a toolkit that offers methodological options consisted with the steps selected for monitoring the impact of sustainable land management initiatives.

Though the guide does not focus on monitoring poverty, gender and social equity in natural resource management, it can be adapted for monitoring these issues.

**Keywords:** monitoring, methodology, tools, indicators

**Call no:** PB100.008  Language: English
This document is a guide to the integration of socio-economic and gender issues in irrigation. This guide has been developed in the context of Socio-Economic and Gender Analysis Programme (SEAGA). The purpose of this guide on irrigation is to support gender-responsive participatory planning of irrigation schemes and to integrate socio-economic and gender issues in the planning process. This guide will be useful for the development practitioners who are involved in planning, design and implementation of irrigation programmes.

This guide consists of three parts - Part 1 applies SEAGA to different stages of project cycle (identification and preparation, design, implementation, monitoring and evaluation). In this section description and importance of monitoring indicators together with incorporating socio-economic and gender issues in logical framework are provided. It also presents a comparative conventional and participatory monitoring and evaluation methods which can be used in irrigation programmes. Part 2, presents ten participatory and visuals tools (resource mapping, seasonal calendar, task analysis by gender, access to and use of resources, Venn diagram, water use matrix, problem ranking and problem analysis chart, options assessment, water group functioning-the three star game) that can be used in the planning and design process. The tools are adapted to an irrigation context and each includes a short description of the purpose of the tool, the procedure for use and a practical example. Part 3 includes four training exercises and five case studies that can be used in a training programme on socio-economic and gender issues for irrigation professionals.

**Keyword:** Gender analysis, tools, methods
Title: Gender Checklist: Agriculture

Author(s): Shireen Lateef

Publisher/institution: Asian Development Bank, Manila

Date: 2003 Pages: 54

Available at: www.generoyambiente.org/act_secciones/archivas/873_1_58_agri2PDF

IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail: library@iucn.org.np Tel: +977 1 5528761, 5528781

Summary:

This checklist is designed to assist Asian Development Bank staff and consultants in implementing ADB’s policy and strategic objectives on gender and development. This checklist is tuned to help the concerned personnel in identifying gender issues in the initial social assessment (ISA) during the fact-finding phase of project preparatory technical assistance. It also contains guidelines on the preparation of gender-sensitive terms for the ISA and the social analysis. The checklist follows a gender analysis framework and is intended to be comprehensive, flexible and adaptable. The checklist is also useful for monitoring natural resource management projects. It also incorporates practical case examples in order demonstrate good practices in mainstreaming gender in the ADB’s agriculture projects.

This document provides tools and checklist for the analysis of irrigation, watershed management, fisheries, coastal zone management and livestock programs, along with suggested strategies for the incorporation of gender in these areas of intervention. This is a valuable resource for planners and implementers of projects in NRM as well.

Key Words: Checklist, tools, analysis, strategy, monitoring

Call no: UG00.081 Language: English
Title: Livelihood Baseline Survey. Findings from Quantitative and Qualitative Studies in the Seven Hills Districts of LFP Programme Area

Author(s): Livelihoods and Forestry Programme in Collaboration with TANGO International, Inc. USA and Development Vision Nepal

Date: September 2003 Pages: 105

Available at: Livelihood and Forestry Programme - Nepal
Tel: +977 1 411022
IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np Tel: 977-1-5528781/5528761

Summary:
This quantitative and qualitative study provides reliable information on the current livelihood status of rural households, the current use of forest resources and the functioning of community forest user groups. The overall objective of the document is to develop a clearer understanding of the livelihood context in which the program works and to generate current information. The baseline study uses a set of livelihood indicators that can be monitored over time to assess the impact of program interventions. This baseline survey report provides the indicators used for poverty assessment in Nepal.

Keywords: approach, indicators

Call no: GA00.057 Language: English
Title: A Profile of the Community-Based Monitoring Systems of Three Zambian Rural Development Projects - National Parks and Wildlife Services ADMADE Program, CARE Livingstone Food Security Project and CLUSA Rural Group Business Program

Author(s): Andy Lyons

Publisher/institution: USAID/Zambia

Date: November 1998  Pages: 63

Available at: www.dec.org/pdf_docs/PNACD821.pdf

Summary:

This paper is a case study of the monitoring systems of three community based development projects funded by USAID/Zambia. All the projects profiled have tried to integrate monitoring into their activities. The document present an overview of the goals and activities of each project, the objectives of the monitoring system, the philosophy and strategy informing the design of the monitoring program, the logistics of monitoring, along with examples of monitoring materials and monitoring data which pertain to performance indicators for USAID/Zambia’s strategic objective one.

Appendix 1 of the paper is a monitoring bibliography which can be used by the readers for further reference. Appendix III provides the spider model self assessment tool for Community Based Organizations (CBO), which can be used by organizations explore their own strength and weakness, reflect on their own performance and identify priorities for change. Appendix IV presents a self-evaluation tool for monitoring. Appendix V presents impact monitoring data for USAID/Zambia’s strategic objective one. This appendix outlines the type of information that could be monitored by the three projects in order to measure the progress towards USAID/Zambia’s strategic objectives. This document is useful for rural development projects and development practitioners and has been elaborated in detail in Volume I (Best Practices) of this bibliography.

Keywords: monitoring, strategy, model, tool, evaluation

Call no: GD50.014  Language: English
This report develops and assesses current approaches to managing common property forest resources and biodiversity for sustainable livelihoods in the middle hill region of Nepal. It also proposes monitoring systems that will enable various stakeholders to plan forest management activities. The project has adopted participatory action research (PAR) approaches, especially for detailed field investigation. A case study approach was used to examine local level monitoring practices within the forest management-planning framework.

It focuses on developing approaches to assist forest users in forest management planning, using methods that are inclusive of different people’s needs and interest and which enable users to learn from new experiences through monitoring. The main findings of the research describe current practices of forest management and constraints to developing effective monitoring systems. The document also describes the process and methodology for developing monitoring systems for use by the forest users. It also recommends strategies for developing planning and monitoring systems with forest users.

**Keywords:** approaches, monitoring
This case study analyses gender and equity (caste) issues in the forestry sector in Nepal within a macro-meso-micro framework. The study focuses on two government programs: the Community Forestry Development Programme and the Community Leasehold Forestry Programme (LFP). The macro level is interpreted to mean forestry policy and legislation; the meso level relates to the public sector responsible for translating forestry policy into practice, in this case, the Department of Forests and foreign donors; the micro level refers to community level organizations, in this case, community user groups. The study traces the gendered impact of policy and legislation through the meso level and the responses at the micro level.

The report has five chapters. Chapter one analyzes the gender implications of forest policies. Chapter two examines the Department of Forests’ capacity for program implementation from a gender perspective and the associated constraints and difficulties. Chapter three outlines the various gender approaches and activities adopted by donors and the challenges faced by them in achieving gender equality. Chapter four analyzes the dynamics of user groups as institutions and the differences between male and female groups. This chapter also provides the rationale for the promotion of women’s group in achieving gender equality in community forestry. Chapter five deals with the ways to address gender inequality at the macro and meso levels and the possible benefits that could result at the micro level.

This study is useful in developing gender analysis methodologies for impact assessment of forestry projects, particularly in Nepal. The list of relevant references appended to the study is extremely helpful for more detailed exploration of methodological issues and concerns.

Key words: analysis, methodology, framework

Call no: UG00.074
Language: English
Title:  *Navigating Gender: A framework and a tool for participatory development*

Author(s):  Arja Vainio-Mattila

Publisher/institution:  Ministry for Foreign Affairs, Department for International Development Cooperation, Helsinki, Finland

Date:  1999  Pages:  60

Available at:  [www.global.finland.fi](http://www.global.finland.fi)

IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail:  library@iucn.org.np  Tel:  +977 1 5528761, 5528781

Summary:

This manual helps in the application of theoretical understandings of gender issues in practical work. It includes key concepts and definitions, and introductions to alternative gender analysis frameworks. Using case studies, the document illustrates the use of these frameworks in the analysis, preparation, implementation and evaluations of programs. This guide is useful both as a study guide and as a resource for group discussion.

Among the guidelines and frameworks for gender analysis incorporated in the study are Rapid Gender Analysis Framework (pg. 26), the FAO framework (pg. 29), Gender Analysis Matrix (pg. 35). These are accompanies by suggestions and instructions on how to use them. It also provides various steps to be followed for gender analysis in monitoring and evaluation of projects and programs.

This guide is useful for project planning and monitoring and evaluation.

Key Words:  framework, tools, gender analysis, monitoring

Call no:  UG10.003  Language:  English
This discussion paper is divided into five chapters. Chapter I describes the socio-cultural context and the opportunities for and patterns of employment of Nepali women in the public sector. Chapter II describes the eligibility criteria and the agencies responsible for personnel management and lists the special provisions for women in the Civil Service Act, 1993. Chapter III presents the current gender composition of the civil service, the entry-level barriers for women, the work environment, and career and capacity development opportunities for civil servants. Chapter IV deals with the forestry sector and describes the representation of women and ethnic groups in the forestry sector civil service, the level of gender sensitivity of existing policies and the problems and issues related to gender representation in forestry. The last chapter deals with the human resource scenario and issues and problems related to HRD in Forestry sectors. This chapter also recommends the HRD policy to be adopted by the Ministry of Forest and Soil Conservation in order to address gender equity within the ministry.

This discussion paper is useful for assessing the current HRD needs of the MOFSC and the capacity of forestry sector civil servants.
### Title:
*Intermediate Level Handbook - SEAGA - Socio-Economic and Gender Analysis Programme*

### Author(s):
Rosalie Norem in collaboration with the Socio-economic and Gender Analysis (SEAGA) Programme, Gender and Development Service

### Publisher/Institution:
Food and Agricultural Organization of the United Nations

### Date:
2001

### Pages:
184

### Available at:
[www.fao.org/sd/SEAGA](http://www.fao.org/sd/SEAGA)

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### Summary:
The purpose of this handbook is to strengthen the idea of participatory development among intermediary agencies that operate between government level policy makers and individuals and households at the community level. It is designed to assist small and medium size organizations such as community-based groups.

The document provides the concepts, tools, guidelines and examples of organizational planning and processes used around the world and encourages the application of Socio-economic and Gender Analysis (SEAGA) concepts and tools. The material presented here is designed to help build capacity in three areas: i) structures and processes internal to organizations and institutional thinking about what might work better, ii) working and planning more effectively with partners in development at all levels and, iii) monitoring, evaluation and feedback about development work. These tools can be modified and adapted in NRM projects.

### Keywords:
**tools, monitoring, evaluation, analysis**

**Call no:** MD40.002

**Language:** English
**Title:** Poverty and the Environment: Measuring the Links

A Study of Poverty-Environment Indicators with Case Studies from Nepal, Nicaragua and Uganda

**Author(s):** Fiona Nunan with Ursula Grant, Godfrey Bahiigwa, Telly Muramira, Pushkar Bajracharya, Diana Pritchard, Mariano Jose Vargas.

**Publisher/institution:** Department for International Development (DFID)

**Date:** February 2002

**Pages:** 71

**Available at:** DFID, Nepal

Tel: 977-1-5531308, 55422980

IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail: library@iucn.org.np Tel: +977 1 5528761, 5528781

**Summary:**

This report incorporates the key findings of a study conducted to develop and pilot test a set of generic environment indicators for potential use in the Poverty Reduction Strategy Papers (PRSPs). These indicators were developed through a review of environmental issues related to the poor and the findings were specifically drawn from participatory poverty assessment. The draft indicators were pilot tested in three countries—Nepal, Nicaragua and Uganda.

The generic indicators proposed in the document can be modified and used by other organizations as per their needs. The indicators provided by the document include environmental indicators, sustainability indicators for natural resource management and policy, criteria and indicators for sustainable forest management, as well as livelihood indicators.

Annex B of the document elaborates on environment indicators specific to Nepal (Table B1). These indicators suggest that the poor appear to be increasingly marginalized as environmental deterioration and income inequalities increase. Selective approaches and strategies will be required to address these issues based on the identified indicators. Annex A and C also provide poverty-environment indicators for Uganda and Nicaragua. This document has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.

**Key words:** indicators

**Call no:** Language: English
Summary:

This paper analyses results from fieldwork in Okhaldhunga and Ramechhap districts conducted jointly by the Nepal Swiss Community Forestry Project and the Sustainable Soil Management Program. The fieldwork tested a methodology for pro-poor integrated development planning with community forestry users groups developed by these agencies through participatory action research. The fieldwork concluded that the tested methodology is workable with technically feasible development options. However, it also highlights the constraints of conducting pro-poor development within an inherently inequitable local context. The paper analyzes these constraints and provides options for alleviating equity problems in user groups to allow community development activities to benefit the poorer user group members of the community forestry program.

Page three describes the methodology used in this paper. The methodology used to identify the development problems of the poor and the possible solutions to them is a combination of modified PRA and RRA tools. An institutional analysis was also undertaken in one user group. The steps followed in the action research process include i) well being ranking to identify the poorest households, ii) household interviews to identify livelihood concerns and needs, iii) focus group interviews to consolidate the understanding of livelihood concerns and needs and to assess the feasibility of development actions, and iv) an analysis of institutional sustainability through Venn diagram, semi-structured interviews and a matrix of sustainability factors.

Based on the findings and a critical analysis the methodology for pro-poor has been refined to provide very specific information and joint decision making that includes the poor.

This methodology is useful for policy planning, implementation and monitoring and evaluation.

Key Words: methodologies, tools, analysis
CLASSIFICATION:

Discussion paper
Manual/guideline
Case study

Dimension of social equity: Poverty
Geographical area: Asia
NRM sector: Environment

Title: Impact Monitoring—Approaches and Indicators
Experiences of GTZ-Supported Multi-Sectoral Rural Development Projects in Asia

Author(s): Durga P. Ojha

Publisher/institution: GTZ (German Technical Cooperation)

Date: December 1998 Pages: 126

Available at: ICIMOD Library, Kathmandu
E-mail: rathapa@icimod.org.np Tel: +977 1 5525313

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np Tel: +977 1 5528761, 5528781

Summary:

This report on impact monitoring contains methods, instruments and indicators which have been tested and applied in Asia. Although this document deals with the practices of Regional Rural Development Projects in Asia, it is useful for rural development and poverty alleviation projects and rural development practitioners in different parts of the world.

The report catalogues impact monitoring of living conditions, natural resource/environment and capacity building. This checklist can be used for identifying suitable indicators for new and ongoing projects. This impact monitoring system can be adapted or modified according to the needs of specific project situations.

Key words: monitoring, indicators

Call no: PB100.005 Language: English
This paper presents a common framework of criteria for project evaluation. These evaluation criteria reflect the IFAD strategic Framework 2002-2005, the current institutional need of the International Fund for Agricultural Development (IFAD) to give stronger emphasis to impact assessment and the need to provide some measures of the contribution to the achievement of the International Millennium Development Goals (i.e. reducing extreme poverty, universal primary education, gender equality, reducing infant and child mortality, reducing maternal mortality, access to reproductive health services, reversal of losses of environment with the strategy of sustainable development). The accompanying tables define the criteria and provide a set of key evaluation questions to help in implementing them. The paper suggests that the consistent application of the framework will ensure that the impact of projects is systematically assessed, that results and performance are comparable across projects and project categories, that generic lessons are more easily identified, and that a consolidation of portfolio performance and results is more feasibly provided.

Three main criteria for evaluation have been incorporated in the paper in Box 1, which is titled “Evaluation Criteria: A Guiding Framework”. The first criterion is impact of the project on poverty (IRP), which incorporate indicators like i) physical and financial assets, ii) human assets, iii) social capital and peoples’ empowerment, iv) food security, v) environment and communal resource base, vi) institutions, policies and regulatory framework, vii) sustainability, and viii) innovation and replicability. The second criterion is performance of the project (PP), which consists of three major indicators to assess impact. These indicators are i) relevance of objectives ii) effectiveness and iii) efficiency. The third criterion is performance of partners (PT), which incorporates dimensions such as adequacy of design, responsibilities, ownership, capacity and degree of engagement in poverty alleviation together with flexibility in implementation.

Even though the impact evaluation framework guideline is specifically designed for the evaluation of IFAD projects, the criteria and indicators can be applied in NRM projects. The other significant aspects of the paper include definitions of impact of poverty, factors affecting sustainability, definitions of performance, and ratings, aggregations and weighting techniques.
### Title: Indicator Development and Selection Guide

**Author(s):** Performance Review Unit, Strategic Planning and Policy Division, Asia Branch  

**Publisher/institution:** CIDA, Ottawa, Canada  

**Date:** May 1996  

**Pages:** 39

**Available at:** [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca)

**E-mail:** library@iucn.org.np  
**Tel:** +977 1 5528761, 5528781

**Summary:**

This guide was developed to assist CIDA’s Asia Branch Project Managers in the development and selection of indicators to measure the performance and development impact of their projects. It focuses on the practical realities of project management and is divided into two parts. Part I provides a general overview of what indicators are and how they should be developed and selected. Part II contains specific details on where the development and selection of indicators needs to be considered in the course of project management. The guide is structured within the Result Based Management Framework of CIDA.

The document incorporates specific examples of qualitative and quantitative indicators and explains the differences between these two types of indicators. It also provides a stepwise guide for the identification, selection and use of these indicators. The critical issues to be considered in selecting indicators for the Logical Framework Analysis have also been highlighted. Indication development and selection flowchart provided in Annex 1 explain in a simple way the steps to be followed in developing indicators. Annex C provides a sample collection of tables required for baseline information to be gathered for the development of required indicators.

Though the guide does not directly focus in integrating gender, poverty and social equity in natural resource management, it is nevertheless useful for the development of indicators for these three dimensions.

**Key words:** Indicators, approach, framework

**Call no:** DE30.002  
**Language:** English
Summary:

This publication provides an insight into the functioning of USAID environmental projects through the practice of gender analysis and suggests measures for improvement. The guidebook will help project implementers and policy makers better understand gender issues in natural resource management and assist them in addressing these issues. The document provides an understanding of how different kinds of natural resource management projects have treated gender issues in the design and other stages of the project cycle.

The guide suggests some implicit and explicit strategies to address gender issues. These fall under five different categories. These are i) decision making, ii) female contribution or participation, iii) access to resources, iv) control over resources, and v) benefits. The magnitude and definition of each of these strategies are significant since they indicate the goal level for achieving either greater equity or project efficiency through applying gender as a crosscutting variable. Page 10-12 describes steps and processes to achieve the strategies.

The review concludes with a set of postulates for further research and monitoring. This document can guide projects in identifying causal factors and in monitoring and evaluation. It has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.

Keywords: analysis, strategy, monitoring, evaluation
This discussion paper was conceptualized on the basis of the lessons learnt from community forestry projects about unequal benefit sharing by the poor and their lack of access to and participation in community forest user groups and other structured and unstructured social forums and institutions. The document begins by analyzing the contributions made by community forestry for the improvement of forests and people’s livelihoods. According to the paper, community forestry has contributed mainly to i) capital formation in rural communities and ii) policy and governance reform of various organizations and agencies. The document also outlines the constraints that impede the poor from benefiting from forestry initiatives. The Conceptual Framework for Pro-Poor Livelihood Improvement in Community Forestry provides the rationale for the development and integration of pro-poor strategies and actions. This conceptual framework establishes the various poverty linkages in community forestry project implementation and how they intersect with the governance structure. The document also provides tools, guidelines and checklists for the inclusion of the poor, based on class, caste, gender, ethnicity and location disparity.

The paper provides details applicable to every stage of a project’s cycle, such as need identification, project planning and implementation. The guidelines, tools, formats, checklists and semi-structured questions incorporated in the annex have been pilot tested with various community forestry users group in Dolakha district.

NSFP is in the initial stage of implementation of this social equity strategy. It is therefore too early for lessons to emerge yet. Even so, the resources provided in the document can be borrowed and used for the objectives of social equity and inclusion in NRM, particularly for monitoring and evaluation.

Key words: tools, checklists, strategy, framework, caste, ethnicity, poverty

Language: English
Economics, poverty and equity indicators: Consolidation of the methodology for forest user groups in Nepal

Michael Richards, Maksha Marajan and Keshav Kanel

Overseas Development Institution, London

July 2000

IUCN Library, Bakhundole, Lalitpur, Kathmandu

library@iucn.org.np  Tel: +977 1 5528761, 5528781

This report is a follow-up and consolidation study to develop an economic methodology for measuring the benefits accruing from community forestry in Nepal. This report is strongly influenced by the need for a methodology to monitor and assess equity indicators in phase 2. This study was conducted in two FUGs (Garjuwa Pakha forest users group (FUG) and Baisekham FUG).

The equity indicators include gross margin per female workday, the percentage of forest product collection by women and the average hours women spend collecting forest products per day. The study strongly recommends the use of key informants at various stages in the methodology, such as in wealth ranking exercises, identifying the range and sources of products collected, unit values and costs, assessing the economic value of particular products, and even for the calculation of findings. It also proposes methodologies for participatory economic analysis, sensitivity analysis, and equity analysis. The conclusion proposes a number of principles for guiding the selection of appropriate economic equity indicators. These are useful for deriving a set of equity indicators for community forestry in Nepal in general. The analysis of equity indicators is accompanied by supporting tables and graphs.

The baseline economic and equity study of forest users groups in 2001-2002 is useful for application in similar projects.

methodology, indicators, approach

Call no: GE31.076  Language: English
## Title
*Review of NARMSAP’s Social Mobilization Approach in Community Forestry and Soil Conservation and Watershed Management*

## Author(s)
SAMANATA

## Publisher/institution
Natural Resource Management Sector Assistance Programme, Ministry of Forests and Soil Conservation

## Date
2003

## Pages
65

## Available at
NARMSAP, Kathmandu  
Tel: 997 1 5528491  
IUCN Library, Bakhundole, Lalitpur, Kathmandu  
E-mail: library@iucn.org.np  
Tel: 977-1- 5528781/5528761

## Summary
This document is a review of the experience gained from social mobilization through female motivators in the two major components of the NARMSAP program, i.e. Community Forestry Field Implementation Component (CFFIC) and Soil Conservation and Watershed Management Component (SCWMC). The review was carried out with the active involvement of stakeholders at all levels. The learning generated from these consultations has been incorporated in the document.

The document focuses primarily on the effectiveness of the social mobilization approach of NARMSAP with a particular emphasis on the identified strategies and indicators of the program. NARMSAP recruited female motivators as a strategy for the promotion of social equity. The selected indicators of social equity are: i) representation, ii) voice and visibility, and iii) implementation of decisions made by women and dalits in the program. The study found both the strategies and the indicators to be effective in incorporating the needs of socially excluded groups and women.

The review also suggests monitoring and evaluation indicators along with a set of sub-indicators within the three broader indicators, which can be applied in relation to social equity issues in the NRM projects of other organizations as well.

## Key words
strategy, indicators, monitoring, approach

## Call no
GE31.075  
Language: English
Title:  *Poverty Orientation guidelines*

Author(s):  Swiss Agency for Development and Cooperation (SDC)

Publisher/institution:  Swiss Agency for Development and Cooperation (SDC), Nepal

Date:  December 1999  Pages:  8 (excluding annexes)

Available at:  Swiss Development Cooperation (SDC), Nepal

E-mail:  kathmandu@sdc.net  Tel:  +977-1-5524927

IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail:  library@iucn.org.np  Tel:  +977 1 5528761, 5528781

*Summary:*

The purpose of this guideline is to enable SDC-Nepal to provide new sector concepts, programs, projects and project phases with principles and choices for poverty orientation. The guideline also provides the basic outline of controlling (SDC includes poverty relevant aspects in its controlling system, particularly in monitoring and evaluation) for poverty orientation with simple tools for monitoring poverty incidence and verifying the effects of projects on poverty. The guideline is intended for the use of the co-ordination office and projects financed by SDC in Nepal.

The document provides some monitoring tools for poverty alleviation such as impact monitoring, participatory monitoring and base line surveys. The guideline incorporates a monitoring system that has been developed at three levels: objectives (annex 1), sectors (annex 2a, 2b, 2c, annex 2c especially focuses on impact monitoring of NRM) and poverty sensitive indicators focusing on different dimensions (annex 3).

*Keywords: tools, monitoring, indicators*

*Call no:  UD20.022  Language: English*
Title: **Poverty-Environment Indicators**

Author(s): Priya Shyamsundar

Publisher/institution: The World Bank, Environment Department

Date: January 2002   Pages: 32

Available at: IUCN Library, Bakhundole, Lalitpur, Kathmandu

E-mail: library@iucn.org.np   Tel: +977 1 5528761, 5528781

Summary:

This paper focuses on identifying the different ways in which indicators can be used to understand the poverty-environment interaction and to monitor poverty reduction resulting from environmental changes. A graphic description of different indicators and examples from water and sanitation projects (figure 1) is presented. The paper addresses two aspects of the environment that affect the poor—environmental conditions which impact on the health of the poor and natural resource conditions that affect the income and security of poor households. The document also focuses on indicators that can be used to monitor the impact of environmental quality on health of the poor. Table 2 presents some immediate and impact indicators that are mainly used to monitor three common environmental health problems faced in poor countries. The paper also looks at the more complex issue of natural resource management and poverty together with the indicators and data needed to monitor change. Table 5 and boxes 4 and 5 present indicators and examples that show the extent to which poor people depend on resources. Table 6 presents a set of poverty indicators within the state-poverty-response framework to monitor deforestation and its income impacts on the poor.

The paper also identifies some poverty-environment indicators presented in Poverty Reduction Strategy Papers (PRSPs). This document has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.

**Keywords:** indicators, monitoring, framework

**Call no:** UD20.023   **Language:** English
Summary:

The “tools for gender analysis” focuses on ways to use gender analysis to increase the effectiveness of development programs and projects for sustainable resource management. It presents an overview of gender considerations in development and suggests analytical tools that can be used to increase the effectiveness and sustainability of projects. The primary goal of the document is to introduce simple and inexpensive tools for incorporating gender concerns into planning, monitoring and evaluation practices of organizations.

The document brings out how gender differences define people’s rights, responsibilities and opportunities in resource management and discusses tools for gathering data and analyzing gender as a variable in households and community organizations. These include wealth ranking, in depth household interviews, focus group discussions and group interviews, participant observation. Sample questions using scales and Gender-Sensitive Monitoring of Progress (GMPP) have been recommended for monitoring.

According to the document, tools like confirmation surveys are useful in providing numerical data on gender-based responsibilities and access to resources for the purpose of project monitoring and evaluation. Other tools included are Gender Analysis Activities Profile (GAAP) and Gender Analysis Matrix (GAM), which have been adopted by Kenya for engaging both men and women in analyzing project impact on gender roles at community level. The formats presented for the different tools help in a clearer understanding of the application of these tools.

Key words: analysis, tools, methodologies, monitoring, evaluation
This manual addresses the constraints to equitable, effective and sustainable development. The document has five sections: an overview of socio-economic and gender analysis (SEGA), Part I provides the conceptual framework, Part-II lists the strategies and tools, Part III outlines scenarios and Part IV deals with measuring effectiveness.

The manual presents and illustrates the socio-economic and gender analysis (SEGA) approach as applied to SARTHI (Social Action for Rural and Tribal Inhabitants of India). This discussion provides insights into the practical application of the SEGA approach.

The document provides 40 tools and strategies for socio-economic and gender analysis. These tools focus on organizing strategies, gathering information, raising awareness, identifying priorities, assessing needs, planning and formulating projects. Instructions and examples guiding the use of these strategies and tools are also provided.

Part III contains 10 case studies on how the SEGA approach and its participatory tools can be applied in a variety of contexts. The aim of this part is to provide field personnel with examples of appropriate use of model components and tools in different situations. Part 1V suggests indicators for determining program and project effectiveness. Many of these indicators focus on monitoring and evaluation. These can be suitably adapted to specific situations.

**Key words:** approach, tools, analysis, model, strategies, monitoring, indicators.
This paper discusses Gender Sensitive (GS) Indicators for monitoring the impacts of a specific project. It can also be used for monitoring the relationship between men and women and how natural resources evolves and changes over time. These systematic GS indicators will help in the formulation of a more sustainable and effective development response, which will contribute towards achieving the Millennium Development Goal by 2015.

The paper outlines the benefits of gender mainstreaming and the reasons for lack of gender mainstreaming in monitoring and evaluation (Box 1 and 2). It also discusses Pressure-State-Response (PSP) indicator framework. PSP can be widely applied in several technical areas owing to its strengths in causal logic and its flexibility. This framework is also suitable for understanding the relationship between gender and socio-economic factors.

The document primarily focuses on how GS indicators can be developed in the management of natural resources. It looks at the following six dimensions for the development of indicators: Dimension—1 women’s and men’s descriptors, Dimension 2—women’s and men’s access to agricultural inputs, Dimension 3—women’s and men’s access to land, Dimension 4—women’s and men’s time dedicated to the sustainable management of natural resources, Dimension 5—women’s and men’s (indigenous) knowledge associated with the management of natural resources, Dimension 6—women’s and men’s participation in the development of response strategies. The paper also provides examples of the kinds of indicators that can be used for capturing each dimension and suggests methodologies on how to develop these indicators.

Key words: indicators, framework, methodologies, monitoring

Call no: UG00.085  Language: English
| CLASSIFICATION: |
|-----------------|-----------------|
| Discussion paper| Dimension of social equity: Gender |
| Manual/guideline | Geographical area: Gender |
| Case study | NRM sector: Agriculture |

**Title:** Handbook for Mainstreaming. A Gender Perspective in the Agriculture Sector

**Author(s):** Helen Thomas, Beth Woroniuk and Johanna Schalkwyk

**Publisher/institution:** Swedish International Development Cooperation Agency (Sida) Department for Natural Resource Management and the Environment

**Date:** 1997 **Pages:** 31

**Available at:** IUCN Library, Bakhundole, Lalitpur, Kathmandu

**E-mail:** library@iucn.org.np **Tel:** +977 1 5528761, 5528781

**Summary:**

This handbook is a reference tool to assist SIDA mainstream gender in agriculture. The overview provides key issues in the agricultural sector from a gender equality perspective and provides key insights and arguments related to gender quality in agriculture.

This document consists of three parts:

1. An analysis of the linkages between gender equality and agriculture, which can guide sector analysis and policy development and the setting concrete measurable goals. Food security as a framework for gender analysis has also been incorporated and is based on food availability or adequate food production, economic access to available food and nutritional security, which often depends on the availability of non-food resources associated with health, education etc.
2. The rationale for the discourse on agriculture. These include talking points, which can guide the policy dialogue in both social justice and effectiveness perspectives.
3. Guidance for mainstreaming gender in different phases of the planning cycle: sector analysis, project formulation/appraisal, annual reviews/monitoring and evaluation. It includes a series of questions to be asked at different phases of the planning cycle. It also incorporates critical questions related to the planning cycle, with comments and justifications as to why these questions are important for planning purposes.

**Keywords:** analysis, framework, monitoring

**Call no:** UG00.083 **Language:** English
Title: Nepal Australia Community Resource Management and Livelihood Project: Strategy and Guidelines for Mainstreaming Gender and Equity Considerations into Project Activities

Author(s): URS Sustainable Development Project Managers and Consultants, Canberra Australia

Publisher/institution: AusAID (Australian Agency for International Development)

Date: September 2003  Pages: 33

Available at: IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np  Tel: +977 1 5528761, 5528781

Summary:

This report focuses on the strategy and guidelines for mainstreaming gender and equity consideration in project activities. It incorporates a matrix, which details the Nepal Australia Community Resource Management and Livelihoods Project’s (NACRMLP) practical strategy for gender and equity mainstreaming. The matrix identifies the key issues and constraints in relation to the first four components (institutionalizing sustainable natural resource management systems, income generation and equity within rural communities, sustainable resource management and upper slopes community-based resource management). The paper proposes strategies to address these issues and provides indicative activities, which are matched with performance indicators and expected outcomes. The report also explains the ways in which gender and equity issues will address the fifth component—project management. The intention of the project is that its management practices will serve as a role model.

Annexes 1 provides a working paper on gender and equity, which is part of the project’s original design document. It also includes a valuable bibliography and a scholarly review of gender and equity issues as they are applied in community resource management in Nepal and the experience of past projects. The strategy and guidelines provided here can be adapted by similar projects.

Keywords: strategy, indicators, matrix

Call no: UG00.075  Language: English
This document focuses on the practical lessons gleaned from extensive fieldwork in the Makalu-Barun area and is of use to other organizations. It proposes a system for the monitoring forest resources and forest management in the Makalu-Barun Conservation Area and National Parks. However, it is not designed to include gender, poverty and social equity. Nevertheless, the methods and monitoring approaches provided here can be applied for examining the gender, poverty and social equity aspects of NRM.

Table 1 presents an overview of the methods for collecting information on the forest, forest conditions and forest product-use levels of community forest user group (CFUG)-managed forests. Section 2 presents the working approach and methods (participatory forest assessment, permanent plot method) for monitoring forest resources, differentiating between tasks for the CFUGs and the field staff. Section 3 presents the approach to monitoring the operational plan implementation, forest product off-take and institutional development of CFUGs based on self-monitoring/evaluation of CFUGs.

The annexes provide different formats (data collection form for participatory forest assessment, plot forms for forest monitoring by permanent plot method, block summary forms for forest resource monitoring, report format for participatory monitoring/evaluation of CFUG forest management activities) for monitoring.

Keywords: methods, approaches, monitoring, evaluation
Title: *Diversity Makes the Difference: Actions to guarantee gender equity in the application of the Convention on Biological Diversity*

Author(s): Guidelle Rodrigues Villalobos, Montserrat Blanco Lobo and Francisco Azofeifa Cascante

Publisher/institution: IUCN - The World Conservation Union

Date: February 2004 Pages: 123

Available at: [www.generoyambiente.org/publicaciones_iucn/biodiversity/modulebiodiversity.htm](http://www.generoyambiente.org/publicaciones_iucn/biodiversity/modulebiodiversity.htm)

Summary:

This book highlights the importance of biodiversity by making visible and illustrating the differentiated relations that women and men establish with nature and the consequences thereof with regard to development promotion.

The book is divided into three chapters. The first chapter reflects on the biological and cultural dimensions of diversity, how the Convention on Biological Diversity (CBD) recovers them, and the need to clearly set out the principle that equity also entails a gender dimension. The second chapter illustrates, from the gender equity perspective, the uses, knowledge, protection actions and distribution mechanisms related to biodiversity resources. The arguments and issues raised in this chapter are also supported with examples that can be used during group reflection and discussions on the topic. The last chapter sees national biodiversity strategies as opportunities to strengthen the equitable participation of women and men.

The book provides several practical examples drawn from field-level realities and several gender analysis methods, such as the relationship between social structure and environment, access to resources and gender relations. The process of applying the decision tree at the filed-level is also described.

Key Words: methods, analysis

Call no: UG00.080 Language: English
**CLASSIFICATION:**

Dimension of social equity: Gender
Geographical area: Asia
NRM sector: Forestry

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**Title:** Gender Analysis and Forestry: Training Package

**Author(s):** Vicki. L. Wilde and Arja Vainio-Mattila

**Publisher/institution:** FAO, Forests, Trees and People Programme.

**Date:** 1995 **Pages:** Nine booklets (400 pages in total)

**Available at:** www.fao.org

**IUCN Library, Bakhundole, Lalitpur, Kathmandu**

**E-mail:** library@iucn.org.np **Tel:** +977 1 5528761, 5528781

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**Summary:**

This training package consists of nine booklets for gender analysis in forestry and was prepared with extensive input from trainers and foresters in Bangladesh, Bhutan, India, Nepal, Sri Lanka and Thailand. It contains a user’s guide, which provides an overview of the structure and contents of the training package. It also describes the Gender Analysis & Forestry Framework used by FAO. The booklet, “Who will use this training package” defines the target audience of the training package. It also explains the step-wise process for gender training and provides training methods and techniques. It also provides training notes to guide trainers in the use of the Gender Analysis & Forestry Framework at training workshops. The third booklet deals with the use of the training package by different levels of people, such as trainers, trainees and training-coordinators. The fourth booklet summarizes the contents of each section to be covered in gender analysis training. The content to be covered in organizing gender analysis training in forestry includes topics such as i) how to design and carry out participatory training workshops, ii) how to use rapid rural appraisal (RRA) to develop case studies, iii) how forestry can benefit from gender analysis, iv) management level and field level frameworks and training notes, and v) case studies as ready-to-use training material presenting examples of success from Bhutan, Nepal, Sri-Lanka, Thailand and Bangladesh.

The gender analysis tools and frameworks provided here can be adapted for other NRM projects and can be used for generating case studies using gender analysis techniques.

**Key Words:** methodology, analysis, framework

**Language:** English
Title: Field Level Handbook—SEAGA—Socio-Economic and Gender Analysis Programme

Author(s): Vicki Wilde in collaboration with the Socio-economic and Gender Analysis (SEAGA) Programme, Gender and Development Service

Publisher/institution: Food and Agricultural Organization of the United Nations

Date: 2001 Pages: 135

Available at: www.fao.org/sd/SEAGA

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np Tel: +977 1 5528761, 5528781

Summary:

The purpose of this handbook is to support participatory development planning at the community level. The tools provided in this handbook can help insiders and outsiders work together to identify key development patterns, understand livelihood strategies and build consensus about development priorities and action plans. Though it is based on actual experiences in agriculture, forestry and fisheries, it is generally applicable for rural development and development agencies working directly with local communities in developing countries.

The handbook focuses on the linkages between economic, environmental, social and institutional patterns, which together constitute the development pattern. It regards the understanding of gender, wealth, ethnicity, caste and other social differences within communities to be fundamental in comprehending livelihood strategies and development priorities. The poor and the marginalized are ensured a voice. It also provides toolkits specifically designed to support participatory processes. The toolkit consists of a number of rapid rural appraisal tools and a series of questions to facilitate and deepen analysis. The handbook can be used for monitoring and evaluation indicators.

Keywords: tools, strategies

Call no: UG00.087 Language: English
Title: Sustainability Indicators for Natural Resource Management and Policy
A Framework for Research on Sustainability Indicators for Agriculture and Rural Livelihoods

Author(s): Phil Woodhouse, David Howlett and Dan Rigby

Publisher/institution: Department for International Development of the United Kingdom
Natural Resources Policy Advisory Department (NRPAD)

Date: February 2000 Pages: 38

Available at: www.les.man.ac.uk/ses/research/CAFRE/indicators/wpz.pdf

Summary:

This paper is one of a series of working papers prepared under the research project “The effects of policy on Natural Resource Management and Investment by Farmers and Rural Households in East and Southern Africa”. It uses the sustainable rural livelihood (SRL) approach as a framework for analyzing management and investment in natural resource use. The purpose of developing this framework is to address the needs of policies and project interventions to reduce rural and urban poverty. Alternative versions of the SRL framework are also provided. The paper also enumerates the five capitals (natural, physical, human, financial and social) of the SRL framework. The five dimensions of sustainability (productivity, security, protection, viability, acceptability) have also been discussed, together with examples of different indicators through the sustainability cobweb model.

The paper also includes a series of issues which needs to be considered in order to operationalize and evaluate this indicator framework in Uganda and South Africa. Various other frameworks and models, like Pressure-State-Response (PRS), Driving force Pressure State Impact Response (DPSIR), have also been discussed in the document. It also provides a matrix of sustainability indicators (table 1) and sustainability indicators-summary of measurement and data requirements (table 2).

Keywords: framework, approach, indicators, matrix

Call no: AA00.026 Language: English
Title: Mainstreaming Gender Equality Perspectives in Bilateral Development Cooperation Focused on the Environment.

Author(s): Beth Woroniuk (Team Leader), Juliet Hunt, Tabeth Matiza Chiuta

Publisher/institution: Swedish International Development Cooperation Agency (SIDA)

Date: 1998  Pages: 33 (excluding annexes)

Available at: ICIMOD Library, Kathmandu
E-mail: rathapa@icimod.org.np  Tel: +977 1 5525313

IUCN Library, Bakhundole, Lalitpur, Kathmandu
E-mail: library@iucn.org.np  Tel: +977 1 5528761, 5528781

Summary:

This aim of this document is to mainstream gender equality perspectives in bilateral development cooperation focusing on the environment. Examples of good practices are presented throughout the report and concrete examples of factors that support the mainstreaming of gender equality perspectives are discussed.

An inventory (1. those used to consider environmental aspects—for example, environment impact assessment guidelines, 2. those specifically aimed to support the integration of a gender perspective in environmental programming, 3. those aimed at supporting a gender equality mainstreaming strategy across a wide range of programmes and sectors, and 4. those used to implement participatory approaches) have been included. The paper suggests that gender consideration should be a part of the project analysis because in general, agency environment tools rarely include gender equality considerations. It also provides examples of the attempt to bring equality considerations into specific environmental tools. Annex 2 provides methodologies that focus on gender equality and environment issues, which are based on natural resource management. Relevant references to numerous other documents are also included. Annex 3 provides an initial framework that reflects the linkages between gender equality and the environment. This framework provides specific areas for consideration in monitoring and assessing the impact of projects, with specific examples of how and why gender inequalities and differences are relevant for such analysis and monitoring.

Key words: tools, methodologies, monitoring, framework, environment

Call no: UG00.082  Language: English
Summary:

This document is intended for those involved in programming and monitoring natural resource management and livelihood activities. More specifically, it has been prepared to enable the program staff of WFP in designing, implementing and monitoring activities that focus on i) strengthening local NRM practices in order to support livelihood strategies, ii) help people secure access to and control over natural resources, iii) diversify livelihood strategies by reducing people’s dependence on natural resources, iv) strengthen links between environmental and socio-economic sustainability, v) decrease the vulnerability of people’s livelihoods to recurrent shocks, and vi) address institutional blockages that impede securing sustainable livelihoods. The guideline gives very high emphasis to the monitoring aspects of programs and suggests several tools, methods and key questions to answer while monitoring WFP/NRM related project activities. This guideline can be considered a best tool for monitoring NRM activities and methods and the questions provided in the guide can be directly applied to other NRM projects.

The guideline emphatically views monitoring as a key aspect of every intervention and therefore argues that the monitoring format should be developed clearly, considering applicability as a guide for those responsible for monitoring. It links the monitoring aspects with the broader conceptual framework of livelihoods and NRM. This resource has been elaborated in detail in Volume 1 (Best Practices) of this bibliography.
Annex 1

Additional Resources: websites and electronic newsletters

www.africa.ufl.edu/asq/v6/v6i1.htm
African Studies Quarterly’s Special Issue: Gender and Soil Fertility in Africa
Cassidy, L., Gladwin, C. and Hoon, P. 2001. Soil fertility is the number-one natural resource in Africa; yet during the last two decades its depletion on smallholder farms has led to stagnant or decreasing per capita food production. Unexamined, except in this special edition of the African Studies Quarterly, are the gender impacts of the soil fertility crisis in Africa. Papers in the special issue examine a variety of development interventions, which have been used to reach women farmers to improve their soils and increase their yields. Such methods include fertilizer vouchers and grants, microcredit, small bags of fertilizer, agroforestry and legume innovations, and increased cash cropping by women. Results show to African policy makers which methods potentially work and have a greater ability to reach women farmers with different household compositions so that they can reverse the alarming trend toward declining per capita food production.

www.awid.org
This resource highlights the impact of fundamentalism on women in particular, identifies trends and strategies to counter them and share comprehensive, cross-regional information and analysis to promote gender.

www.cgiar.org
The Participatory Research and Gender Analysis Program of the CGIAR develops and promotes methods and organizational approaches for gender-sensitive participatory research-related activities in the fields of agriculture, forestry, fisheries, policy, and environment.

www.dawn.org.fj
This is the website of one of the largest women’s organization based in the south, Development Alternatives with Women for a New era (DAWN), a network of women scholars and activists who are working for development alternatives that are equitable, gender just and sustainable. The web site includes links and resources to research themes, regional engagements, publications and general information and debates on the theme of gender and development.

www.developmentgateway.org/gender
The Gender and Development page of the Development Gateway of the World Bank is envisioned as an Internet platform for gender and development-related resources, information, and dialogue. The objective is to enhance the effectiveness of development efforts worldwide through sharing knowledge of gender-sensitive analysis, actions and policies. This website is very rich in case studies where gender issues play a part in successful development programs. It provides links to networks and organizations that have been formed to address gender issues, and analytical work on the connections between gender and effective development. The Gender and Development Page is a tool for all those working to advance gender equality by improving the lives of poor women and men. More specifically, the information on this site will be of interest to NGOs and government offices that address gender issues, development officials who are planning projects and wish to ensure that gender questions are addressed, and researchers or academics who believe that specific gender-based problems exist and should be studied.
Women, Pesticides and Sustainable Agriculture:

Pesticide use and exposure among women is a central issue in the move towards a sustainable future. These substances are environmental toxins which have been defined as “chemical compounds that are created and dispersed into the environment specifically in order to kill living creatures known as pests, be they insects, weeds, bacteria, fish, snails, birds, rodents or other forms of life.” (1) Agenda 21 clearly outlined an agenda for sustainable agriculture that includes reduced reliance on pesticides through a variety of steps, which would reduce exposures, including enhanced reliance on integrated pest management.

www.echonet.org

ECHO reviews a great variety of sources for practices of potential benefit. An excellent source for agricultural development ideas and seeds.


FAO is the lead United Nations agency for agriculture, forestry, fisheries, and rural development. The gender site focuses on methods and examples of how to improve women’s access to opportunities and resources.


SD-Dimensions’ “Publication Page” of The Food And Agriculture Organization contains over 100 sustainable development publications available electronically. These publications cover a wide range of issues, including biodiversity, natural resource management, land tenure, communication for development and, gender issues.


Gender sensitive indicators: A key tool for gender mainstreaming

FAO. 2001. This article gives an introduction to recent work of FAO on the use of gender-sensitive indicators for gender mainstreaming. Such indicators provide an effective mechanism to ensure that programs and projects give due consideration to the different roles and responsibilities of different members of the society.

www.fao.org/sd/seaga/index_en.htm

The Socio-Economic and Gender Analysis (SEAGA) Program is part of United Nations Food and Agriculture Organization (FAO). SEAGA was established to incorporate socio-economic and gender considerations into development projects programs of the United Nations. Their approach to planning and implementation is participatory. SEAGA has developed gender-mainstreaming handbooks for the field level, intermediate level and macro level. The handbooks focus on irrigation, the project cycle, household resource management, incorporating gender in on-farm management of plant genetic resources, micro finance, socio-economic and gender analysis in emergency operations.

www.fao.org/WAICENT/FAOINFO/SUSTDEV/Wpdirect/Wpan0001.htm

Jaques du Guerny. March 1996. This essay analyzes the power relationships demonstrated in female land ownership and tenure. Male-female constraints and disparities are addressed as shown in Latin America, Africa, and the Middle East, especially as they related to sustainable agricultural development and poverty.

www.fao.org/WAICENT/FAOINFO/SUSTDEV/Wpdirect/Wpan0027.htm

Women's Role in Rice Farming

Tiina Huvio. November 1998. This essay focuses on the rice production industry, mostly in Asia and Africa. It provides an analysis of gender roles, land availability and ownership, and poverty as it relates to the production, and continues with an in-depth look at technological improvements which could improve conditions for men and women alike.
Gender and Participation in Agricultural Development Planning
S. Sontheimer, 1998. This SD-Dimensions Special is based on documentation produced for a “Workshop on Gender and Participation in Agricultural Planning: Harvesting Best Practices”, held in Rome on 8 -12 December, 1997.

www.flamme.org
This website provides an archive on women and women’s NGOs in Africa with information concerning the Dakar and Beijing Platforms for Action and assessment process in Africa, information about the UN and regional process, and NGO inputs and linkages with other regional review processes.

www.focusintl.com/widnet.htm
A very substantive web site that, among other things, includes a database on gender and development. The web site includes several useful resource bases divided into three overall areas: Statistics, Themes and Resources, and are available in both French and English.

www.gema.org
This is an information platform about gender and rural development. It provides useful information related to gender mainstreaming and delivery of services to rural women, and promotes the exchange of information about gender and rural women between program executors and rural development programs.

www.genderlinks.org.za/
Gender Links’ primary area of focus is the transformation of gender relations in and through the media by: Conducting research on gender disparities in the internal structures and editorial output of the media, as well as working with media institutions to develop corrective policies; Developing gender training materials for the media, and assisting media training institutions in applying these; Creating and sharing content that demonstrates how a gender perspective can be integrated into media coverage; Taking advantage of opportunities presented by information and communication technologies for advancing gender equality; Strengthening the media and communication skills of gender activists and women in decision-making. In addition Gender Links leverages its skills and expertise by providing research and advisory services on gender and governance more broadly. In all its work, Gender Links strives to build strategic partnerships and networks and to serve as a catalyst for gender transformation by working through existing structures.

www.GenderReach.com/pubs/lb7.htm
Sowing the Seeds of Opportunity: Women in Agribusiness
Gender Reach, December 1999. Work in agribusiness by women constitutes a significant proportion of their formal sector employment in developing countries.

www.globalfundforwomen.org
The Global Fund for Women is a grant-making foundation supporting women’s human rights organizations around the world working to promote economic independence, increasing girls’ access to education, and stopping violence against women. The site highlights economic opportunity and independence for women, increasing girls access to education improve women’s health and reproductive rights, stop violence against women, political participation, lesbian rights, women with disabilities, access to information technology.

www.home.yawadoo.com/mondefemmes.orgx/
The site of ‘Le Monde Selon Les Femmes’ provides information on training and development concerning women’s issues. Promotes gender equality in the work place and communication of women in developed and developing countries. Online publication.
**www.huairou.org/**
The web site of the Huairou Commission, very active in the field of gender equality and women’s rights in human settlements development, with which Habitat has had very strong collaboration over the years.

**www.icrw.org/**
The International Center for Research on Women also focuses on international advocacy. Provides past research online, and lists current research projects. Themes include Poverty Reduction, HIV/AIDS, Reproductive Health, Social Change, Adolescence, Policy and Advocacy.

**www.idrc.ca/acb/showdetl.cfm?&DiD=6&Product_ID=2651&CATID=15**
In rural Africa and the Middle East, many ecosystems are on the verge of collapse. The interplay of social, ecological, and political-economic forces has compromised the ability of farmers to sustain their precious soil. As a result, farmers, and especially women farmers, face a constant daily struggle to survive.

**www.idrc.ca/gender/**
The Gender and Sustainable Development Unit of IDRC promotes and facilitates gender mainstreaming within the center, and gender sensitivity in research for sustainable development. It covers themes such as Land Ownership, Training, Natural Resource Management, Employment, Communication for Development, Environment, Health

**www.idrc.org/genderlinks**
Natural Resource Management and Food Production - IDRC’s Gender Links
This website of IDRC provides useful information about all ongoing activities of IDRC related to gender. It contains list of useful resources-books, research reports, magazine and newsletter and ongoing programs and projects of IDRC, useful gender links together with useful resources available at IDRC. It is regularly updated by IDRC and new resources are constantly added.

**www.ids.ac.uk/bridge/**
Bridge is a part of IDS (International Development Studies) at the University of Sussex and specializes in information and analysis regarding gender equality and women’s rights. Bridge’s objective is to assist development professionals and organizations to integrate gender concerns into their work. They have a substantive and extensive resource base on issues relating to this field and when using their gender information exchange, GENIE, it is easy to access Gender Country Profiles as well as to get hold of gender experts and consultants. In this section, information on best practice databases and other resource bases can be found through “key word” searches.

**www.ids.ac.uk/eldis/gender/Gender.htm**
A useful resource center with a large number of links and information, including publications, Gender Country Profiles (including statistics), research themes, network contacts and thematic e-mail lists. Eldis web site on gender also offers a constant update on new information and publication (Can be linked through Bridge web site).

**www.ifpri.cgiar.org/**
Intra-household impact of the transfer of modern agricultural technology: a gender perspective
IFPRI Food consumption and Nutrition Division. Discussion Article 85. The data suggest that group-based programs targeting women have a greater potential to address gender relations within the household and society than do programs targeting women as individuals. In male-dominated societies where women have limited access to internal or external support networks, programs targeting women as individuals that do not also provide alternative sources of support are bound to fail in their gender goals. [PDF Version]
**www.ifpri.cgiar.org/themes/mp17/gender/gender.htm**

GENDEV is an e-mail network of the International Food Policy Research Institute (IFPRI) that focuses on intra-household and gender aspects of food and agricultural research. It is set up to provide mutual support and encouragement to researchers working on gender and intra-household issues at CGIAR centers, NARS, and related NGOs involved in food and agricultural policy.

**www.ifpri.org/themes/mp17/gender/gender.htm**

Gender Differentials in Farm Productivity: Implications for Household Efficiency and Agricultural Policy

H. Alderman, et al. 1995. This paper challenges one of the main tenets of agricultural economics—that households behave as though they are single individuals, with production factors allocated efficiently between men and women. The efficient allocation of production factors is assumed to be true in virtually all models of the household in the economics literature, and it implies that yields will be the same on all plots planted to the same crop within a household in a given year, adjusting for plot characteristics.

**www.inforesources.ch/**

Info Resources is a newsletter, which is regularly updated. It provides information on recent work and initiatives of different agencies. It is a source of information on natural resources in international cooperation, focusing on agriculture, forestry and environment. It contains abstracts of recent research, case studies, new projects and new initiatives of different agencies. For example the December Issue of the newsletter contains the abstract of a study carried out by FAO entitled “Gender and natural resource management: Where do we stand”, “Poverty and environmental degradation in drylands” a Norageric working paper abstract, “Modeling natural resource management: An instrument for negotiation” etc. Access is based on membership.

**www.kari.org**

The Kenyan Agricultural Research Institute is an agricultural institute seeking to acquire and contribute knowledge and creative solutions that are participatory and client oriented, gender sensitive, holistic and system-oriented.

**www.myrada.org**

MYRADA is an NGO managing rural development programs in three states of South India and produces publications dealing with problems facing such development.

**www.netaid.org/**

NetAid is a recent partner of The Development Gateway which joins the Poverty topic page as a Cooperating Organization.” It is a Network of people and organizations. The international community has set a goal of cutting extreme poverty in half by 2015. Poor countries cannot reach this goal alone; significant progress requires a supportive partnership for development between poor and wealthy countries. To help forge this partnership, NetAid’s mission is to mobilize people in developed countries to make ending extreme poverty a global priority. Combining innovative programs with new technologies, and working in partnership with the United Nations and the private sector, NetAid is building a network of everyday people committed to working for a world without extreme poverty.

**www.netfemmes.cdeacf.ca/**

This site acts as a network of information exchange among women in developed and developing countries. Provides bibliographic records of new publications and of the documents from women’s groups in various countries around the world.
The website features the work of the MERGE program - Managing Ecosystems and Resources with Gender Emphasis (MERGE), Tropical Conservation and Development Program, Center for Latin American Studies, University of Florida. It was developed to strengthen the understanding of gender issues in natural resource management for both academic researchers and local technicians responsible for the implementation of natural resource management projects. Its strategy focuses on gender, participatory approaches with local communities, and resource management to address both conservation and development goals. The website features case studies.

The role of women in livestock production in the Mantaro Valley – Peru
E. Fernández-Baca. 1996. Until recently it has been assumed that all the small-scale mixed farming systems in the Mantaro Valley of Peru were managed by men, while the women were in charge of reproductive activities. For this reason, most livestock development projects, as well as extension and training programmes, were directed exclusively towards men. Now, however, the traditional distribution of agricultural tasks according to gender has been acknowledged.

The web site includes useful gender mainstreaming guidelines, reports and research as well as publications and a very useful source book on concepts and approaches. Provides links to other related sites on gender equality and women’s rights.

Women Human Rights Net is a collaborative Information and Communication Technology project developed by an international coalition of women’s organizations (including UNIFEM and One World Online). It includes links to several relevant web sites as well as access to resources and publications in the field, it also includes forums for dialogues and discussion on the area of women’s rights.

This is a mega site containing useful and reliable information on gender and the information to improve understanding and impact of actions involving sustainable human development in Central America.

This site provides information on gender-sensitive participatory methods and approaches particularly on management of crops and natural resources.

Self-Employed Women’s Association (SEWA) is an Indian organization of poor, self-employed women workers. The site features resources, links, information on campaigns and women’s organizing and links.

Provides an on-line database of gender and development materials and an interactive space where gender practitioners can share ideas, experiences and resources. Contains texts, case studies, checklists, tools, and methods.

The basic web site for information on UN’s work and commitment to gender equality and women’s right. Here you find links to all major UN agencies such as DAW, CSW and UNIFEM, as well as all information on all crucial documents, such as the CEDAW and the Platform for Action, and the processes surrounding them.
www.un.org/womenwatch/world/#
A web site including information on all regions with country specific information such as Gender Profiles, national Follow-up of the Beijing Platform of Action, national plans of Action based of the Platform for Action, the national report to the CEDAW Committee (Unofficial) NGO reports (the so-called “shadow report”) and references and coordinates to the national responsible machineries, such as Ministry of Women Affairs and similar organs.

www.undp.org/gender
UNDP’s Gender in Development center advises, supports, and facilitates UNDP gender equality policy, dialogue and practice, and promotes the empowerment of women. The site offers information about best practice examples, their policy and links to tools for building capacity for organizations to mainstream gender in their work. It includes themes such as: Environment, Governance, Health, Poverty and Micro-Credit, Science and Technology, Gender and ICTs, Statistics and Indicators, Violence Against Women. The web site contains useful guidelines (in the form of a “Gender Mainstreaming Information and Learning Pack”) as well as samples of “Good Practices” in the area of gender mainstreaming. The site provides data and statistics in the form of studies, and research as well as references to indicators to use for gender mainstreaming.

www.undp.uz/GID/
This website reports on the gender activities of the UNDP Regional Gender in Development Program in Central Asia, the Caucasus, and Turkey. It includes issues such as: Improving Women’s Political Participation and the Responsiveness of Governments to Gender Related Problems

www.unhcr.ch
In the last few years, UNHCR has developed a series of special programs to ensure women have equal access to protection, basic goods and services as they attempt to rebuild their lives. This website showcases the work done by UNHCR in this regard.

www.unifem.org
UNIFEM is the women’s fund at the United Nations that provides financial and technical assistance to innovative programs and strategies that promote women’s human rights, political participation, and economic security. Also incorporates women’s issues and concerns in national, regional and global agendas of the United Nations.

www.wld.org/
WLD, or Women, Law and Development is a web site with very useful resources and news on women’s rights from a legal perspective. A newsletter can also be found on the web site with the latest update in the area, as well as links to other relevant sites and organizations.

www.womenaction.org/
Information, communication and media network that provides global information, communication and media network that enables NGOs to actively engage in the Beijing +5 review process with the long term goal of women’s empowerment, with a special focus on women and media.

www.worldbank.org/gender/
The World Bank has a very comprehensive and useful web site on gender equality with resources, data and links. The site both gives general data such as very useful statistics given country by country, as well as analysis on specific themes on topics such as transport and technology as well as poverty reduction strategies and rural development. The web site also provides links to another resources and partners in the area of gender mainstreaming.
The World Bank Group’s mission is to fight poverty and improve the living standards of people in the developing world. Poverty Net is created and updated by the World Bank regularly which comprises of resources related to various aspects of poverty. The Poverty Net site is maintained by the Poverty Reduction Group, which is a part of the Poverty Reduction and Economic Management Network at the World Bank. It is made up of several nets such as safety nets, impact evaluation safety nets, health and poverty, poverty reduction strategies, pro-poor growth and inequalities, social capital and voices of the poor. Useful literature on poverty, social capital, inequality, pro-poor growth and inequalities, and poverty reduction strategies can also be accessed through this web. Current literatures on poverty related issues and impact evaluation studies are regularly posted in this web.

Provides information on research centers focusing on gender issues. Provides access to an electronic library that offers links to articles.
Gender-related electronic newsletters

a. **Name of bulletin:** AWID Carrefour  
**Publisher:** The Association for Women’s Rights in Development (AWID)  
**Geographic focus:** Worldwide  
**Language:** English, French, And Spanish  
**Periodicity:** Not available  
**Themes:** Women’s Human Rights, Gender Equality, Sustainable Development, Policy, Institutional and Individual Change  

How to subscribe: E-mail: awid@awid.org  
Website: www.awid.org

b. **Name of bulletin:** AVIVA  
**Publisher:** Women’s Worldwide Web  
**Geographic focus:** Worldwide  
**Language:** English  
**Periodicity:** Monthly  
**Themes:** Free Listings of Women’s Groups, Services, and Events Worldwide  

How to subscribe: E-mail: development-gender-subscribe@egroups.com  
Website: www.aviva.org

c. **Name of bulletin:** CrisisWeb  
**Publisher:** International Crisis Group  
**Geographic focus:** Worldwide  
**Language:** English, French, Spanish, and Russian  
**Periodicity:** Not available  
**Themes:** Field-Based Analysis, High-Level Advocacy, Prevention and Containment of Conflict, Gender and Conflict Issues  

How to subscribe:  
Website: www.crisisweb.org

d. **Name of bulletin:** Development Gateway  
**Publisher:** Not available  
**Geographic focus:** Worldwide  
**Language:** English  
**Periodicity:** Not available  

How to subscribe:  
Website: www.developmentgateway.org

e. **Name of bulletin:** Gender Awareness Information Networking System (GAINS)  
**Publisher:** The United Nations International Research and Training Institute for the Advancement of Women (INSTRAW). Its purpose is to keep NGOs and civil society groups informed about increasing opportunities for interacting with GAINS in development projects.  
**Geographic focus:** Worldwide  
**Language:** English  
**Themes:** Women and Development
How to subscribe: Website: www.gains.iatp.org.ge

f. Name of bulletin: Gender Beat
Publisher: Not available
Geographic focus: Worldwide
Language: English, French
Periodicity: Not known
Themes: Gender and/or Development-Related Events and Initiatives Worldwide

How to subscribe: E-mail: asako.osaki.undp.org

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g. Name of bulletin: Gender Information Exchange (Genie) Update
Publisher: BRIDGE
Geographic focus: 
Language: English
Periodicity: Monthly
Themes: Gender-Related Donor Resources and Gender Resources Information Exchange

How to subscribe: E-mail: genie@ids.ac.uk
Website: www.genie.ids.ac.uk

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h. The Gender CG Newsletter
The Gender CG Newsletter is intended to be a hardcopy complement to the GENDEV (formerly Gender CG) Network, an electronic network that connects researchers working on gender and intra-household issues in the areas of agriculture, natural resources management, food security, and nutrition
Website: www.generoyambiente.org/articulos_estudios/docs/dp06.pdf

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i. Name of bulletin: id21 News
Publisher: Development Research Reporting Service, University College, London
Geographic focus: Worldwide
Language: English
Periodicity: Monthly
Themes: Development, Social and Economic Marginalisation, Ecological Sources of Conflict Impact of Development Issues on Gender, Health Resources, Policy Solutions

How to subscribe:
E-mail: id21@ids.ac.uk
Website: www.id21.org

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j. Name of bulletin: IWTC Women’s Globalnet
Publisher: New York: International Women’s Tribune Center
Geographic focus: Worldwide
Language: English
Periodicity: Not Available
Themes: Initiatives and Activities of Women Worldwide, Gender Issues, Human Rights, Development, Economics, Environment

How to subscribe:
Send blank message to iwtc-womensglobalnet-subscribe@igc.topica.com

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k. Name of bulletin: UNIFEM CURRENTS
Publisher: United Nations Development Fund for Women
Geographic focus: Worldwide
**Language:** English  
**Periodicity:** Monthly  
**Themes:** Gender-Based Events and Initiatives, Human Rights, HIV/AIDS United Nations Gender-Based Projects, Political Campaigns and Developments Relating to Gender

**How to subscribe:**  
E-mail: majordomo@undp.org with the following command in the body of your message: subscribe unifem-currents <email address of new subscriber> (example: subscribe unifem-currents, jessica.humphreys@undp.org)

1. **Name of bulletin:** Women’s International News Gathering Service (WINGS)  
**Publisher:** WINGS  
**Geographic focus:** Worldwide  
**Language:** English  
**Periodicity:** Not Available  
**Themes:** Produces and distributes current affairs program by or about women. Available on local radio, short wave radio, internet, and cassettes. Mailing list provides updates on stories and new information about women’s media.

**How to subscribe:** Website: [www.wings.org](http://www.wings.org)

m. **Name of bulletin:** Women, Ink  
**Publisher:** New York: International Women’s Tribune Center  
**Geographic focus:** Worldwide  
**Language:** English  
**Periodicity:** Yearly with Monthly Updates  
**Themes:** Catalogue of Cutting-Edge Publications on Women and Development

**How to subscribe:** E-mail: wink@womenink.org
# Annex 2

## List of Annotated Bibliography Entries by Keyword

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<td>2.</td>
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<td>Aguilar, Loren; Castaned, altza; Salazar, Hilda; with collaboration of Rodriquer, Guiselle and Siles, Jackeline - February 2002</td>
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*All resources are in English with the exception of No. 5 which is in Nepali.*
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<td>Linking Policy Interventions and Livelihood Impacts - Identifying Potential Livelihood Indicators</td>
<td>Chadwick, Matthew; Oliver, Springate-Bagonski; Soussan, John and Blaikie, Piers</td>
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<td>Fort, Lucia; Martinez, B.L and Mukhopadhyay, Madhuchanda - 2002</td>
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**IUCN HQ**
Rue Mauverney 28  
Ch-1196 Gland  
Switzerland  
Tel. (41 22) 999 0001  
Fax: (41 22) 999 0002  
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63 Sukhumvit 39  
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Sukhumvit Road, Wattana  
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Fax: (66 2) 662 4388  
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**IUCN Nepal**
P.O. Box 3923  
Bakhundole, Lalitpur  
Kathmandu, Nepal  
Tel. (977-1) 5528781/5528761  
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