

CIDA Philippine Program
GENDER EQUALITY MONITORING REPORT
PRIVATE SECTOR DEVELOPMENT PROJECTS
May 2007

HIGHLIGHTS

Overall, the PSD projects have done better than when last monitored in May 2006. Several gender equality results have been noted. There is enhanced capacity of staff in some projects to incorporate gender equality in project analysis and M&E tools. Projects have improved opportunities for women and men to gain skills, business advice, or access to markets. There is likewise an increasing body of evidence that business advice and/or participation in trade fairs has contributed to the creation of new jobs and generation of income opportunities, particularly for women. Moreover, when assessed using the Philippines' *Harmonized Gender and Development Guidelines*, the projects rated well, with scores for project management, implementation and M&E falling within the limit of "gender-sensitive."

While there were gains made during the past 12 months, most of the PSD projects need to improve in such areas as: (1) allocation of resources for gender equality, including the hiring of part-time gender equality experts who can provide critical inputs during project implementation; (2) incorporation of gender analysis in industry or sector reports that will serve as a basis for planning; (3) application of tools that have already been developed and building of commitment and capacities within the project for managers and staff to use the tools; and (4) choice of strategic interventions that can help achieve expected gender equality results, particularly increased income and employment of women.

One key lesson from the experiences of the PSD projects of CIDA in the Philippines thus far is: attention must be paid to gender equality in every step of project planning and implementation, and it needs to be strategic, with the right implementation support from CIDA and the executing agency, and incorporated in the project monitoring and evaluation.

BACKGROUND

The Interim Strategy of the Philippine Program of the Canadian International Development Agency (CIDA) aims to "contribute to poverty reduction in the Philippines through equitable, sustainable development." It pursues this goal through its two programming areas: governance and private sector development (PSD).

The PSD program, which is the focus of this monitoring report, seeks "[t]o support the development of sustainable small and medium enterprises that create more, better and decent jobs for both men and women." The realization of this objective rests on the attainment of four results:

- 2.1. Improved policies, legislative and regulatory frameworks that facilitate SME [small and medium enterprise] development;
- 2.2. Increased capacity of organizations to deliver business support services to SMEs;
- 2.3. Improved access by SMEs to financing; and
- 2.4. Increased SME capacity to mobilize resources, expand market access and increase employment.

Gender and environment are crosscutting themes that should be integrated into planning and management in all CIDA programs and projects, including PSD projects. The CIDA gender equality policy has three objectives, namely:

1. To advance women's equal participation with men as decision-makers;
2. To support women and girls in realizing their full human rights; and
3. To reduce gender inequalities in access to and control over the resources and benefits of development.

This monitoring report covers the CIDA-supported PSD projects that have been ongoing since the last monitoring of PSD projects in May 2006. The report is based on information gathered through a combination of methods and sources: reports submitted by projects; interviews with the gender equality consultant or focal person and other key implementers in the project; and, in two projects, interviews with subproject partners. It also incorporates comments of projects on an earlier version of the report.

CIDA PSD PROJECTS

As of May 2007, CIDA had five PSD projects in various stages of implementation. Of these, one is ending in September 2007 and another in March 2008. A third has been extended until November 2008. These current projects are:

- *Business Advisory Project, Phase 2 (BAP)*, a five-year project (2003-2008) implemented by the Canadian Executive Service Organization (CESO) and a local partner, the Philippine Business for Social Progress (PBSP) for the Corporate Volunteers for Enterprise Development (CVED) program. It was originally focused on assisting individual SMEs through the delivery of business advice of Canadian Expert Advisers (EAs).
- *Private Enterprise Accelerated Resource Linkages Project, Phase II (Pearl2)*, a five-year project (2002-2007; extended to November 2008) that is being implemented by Agriteam Canada Consulting Ltd. A successor project of two previously CIDA-funded projects, the Enterprise Support Project and the first phase of the Private Enterprise Accelerated Resource Linkages Project, Pearl2 focuses on three initiatives to promote the development of SMEs. These are: (1) sectoral enhancement, which seeks to support the development of key labor-intensive sectors, as identified by the Department of Trade and Industry (DTI), and within each sector, to work with strong sector associations; (2) partnership development facility (PDF), which is a responsive mechanism; and (3) capacity development for investment promotion (CDIP).
- *Promoting Youth Employment in the Philippines (PYEP)*, a two-year project (2005-2007) with the International Labor Organization (ILO), Manila Office; it has been granted a no-cost extension until 30 September 2007. The project seeks to facilitate the creation of employment opportunities for young women and men in the Philippines by (1) supporting efforts of the Philippine government and other partners to formulate and implement an integrated policy and program package for youth employment at national and local levels; and (2) implementing action programs with key youth targets including school leavers, young women and men with low skill jobs, the unemployed, youth in the informal economy, and entrepreneurs.

- *Promoting Rural Industries and Market Enhancement (PRIME)* program, a five-year project (2005-2010) implemented by the Philippine Development Assistance Programme, Inc. (PDAP). The project is designed to facilitate the participation of rural poor in enterprises that enhance food security, increase household income and create jobs. PRIME has four components: micro-enterprise development, enhancing participation in the market, policy analysis in support to rural micro-enterprises/industries, and strengthening the institutional capacity of PDAP. To date, the program focuses on three industries: muscovado sugar, organic rice and seaweeds.
- *Private Enterprise Partnership (PEP)-Philippines* Project with the International Finance Corporation (IFC), which runs for four years to June 2009. It aims to support the growth of small and medium enterprises and to improve their value addition to the economy. The project aims to achieve this through five business lines that reflect the global strategy of IFC for technical assistance, namely: access to finance (A2F), business enabling environment (BEE), infrastructure, sustainability, and value addition to firms (VAF).

Another CIDA project, the Gender-Responsive Economic Actions for the Transformation of Women (or GREAT Women) Project, straddles the governance and PSD programming areas. It aims at creating an enabling environment at the national and local levels for women's economic empowerment. It focuses on women micro-entrepreneurs and workers in micro-enterprises.

GENDER ISSUES IN PSD AND CIDA RESPONSE

As discussed in the May 2006 monitoring report, there are two clusters of gender equality issues that should be addressed by interventions that seek to assist the private sector. One set pertains to human resources; the other, to issues besetting enterprises. The continuing relevance of these issues to CIDA programming in the Philippines is discussed in this section.

Human Resources Issues

The key issues related to human resources include both supply-side constraints, which shape women's decision to join the labor market or venture into business, and demand-side hiring and working conditions that affect the productivity, welfare and status of women and men workers. One issue that affects many supply-side gender issues is the *unequal gender division of labor*. It constrains women's participation in the labor force; limits many women to economic activities that could be easily integrated into their household responsibilities; and, among employed workers, a doubling of burden, as they have to attend to household responsibilities before and after work. Other specific gender and development (GAD) issues are:

1. *Differences in the quality of labor supply and labor market situation*, with women, as a group, being more formally educated, but tending to cluster in certain fields and men gravitating towards other fields. Unemployment among "middle-educated" workers is particularly high. The job search seems to be harder on young women who have been in school longer but have not stayed long enough to complete college. But in areas where a college education makes a difference, as in the civil service and in big business firms, women have better chances of finding a job than do the men. Yet women are generally paid lower, on the average, than men.
2. *Pre-employment biases* that are manifested in job advertisements, which explicitly state gender preferences for certain positions.

3. *Lack of awareness and appreciation of the gender issues women workers face, such as unequal gender division of labor at home and in the work place, sexual harassment and other forms of gender-based discrimination. This blindness to gender-related problems faced by women workers has been noted even among women owners of small and medium enterprises who generally come from a more privileged class than their workers.*

RELEVANCE TO THE CIDA PROGRAM: *These issues are relevant to Expected Results 2.4 of the CIDA Strategy for the Philippines. Pearl2 is indirectly addressing the issues of gender-based discrimination against women workers and lack of sensitivity to the gender needs of workers in its initiative to raise awareness and secure commitment to gender equality within the business service organizations (BSOs) and within SME members of the BSOs. The gender equality filters used by BAP (particularly PBSP-CVED) in diagnosing businesses that are applying for business advice assistance alert volunteer advisers to gender issues in the work place. ILO-PYEP, for its part, can help address high youth unemployment—including the case of middle-educated unemployment—through its enterprise program for female and male youth workers.*

Enterprise Issues

Issues that beset enterprises differ according to their scale of capitalization and operation. *Micro-enterprises and micro-entrepreneurs, many of whom are women, face the following issues:*

1. *Little social protection, with the few social protection policies for micro-entrepreneurs and informal-sector workers yet to be fully enforced.*
2. *Women's preference for certain types of micro-scale operation (such as small stores) that will not interfere with the care of their home and family but will address consumption needs of their households.*
3. *Limited access to credit, with micro-enterprises often constrained to borrow from micro-financing sources that grant low loan ceilings, or from loan sharks who extend larger loans but at very high cost.*
4. *Gender-role stereotyping in the training and technical assistance extended to women and men micro-entrepreneurs that tend to keep women in low-value enterprises.*

RELEVANCE TO THE CIDA PROGRAM: *All the expected results (2.1, 2.2., 2.3, and 2.4) of the CIDA PSD program. PRIME and the GREAT Women Project both have components that involve micro-enterprises. PRIME, however, needs to address issues (3) and (4) more actively to achieve its target of 40% women participation or membership in rural enterprising communities, or RECs. So far, its interventions have been with men-dominated rural micro-enterprises.*

In the case of *small and medium enterprises*, the gender issues facing women entrepreneurs in particular include the following:

1. *Institutions or rules of the market governing credit that favor people who own assets. Real-estate collateral requirements of financial institutions tend to favor men who, unlike women, are more likely to own properties. Moreover, despite the revised Family Code, financial institutions continue to require female borrowers—even women in business and/or those who have property to offer as collateral—but not male borrowers to get their spouse to sign the loan documents.*

RELEVANCE TO THE CIDA PROGRAM: *Expected Results 2.1 and 2.3. ILO-PYEP, PRIME and IFC-PEP are designed to help bring about changes in policies in their respective areas of influence. At least as designed, IFC-PEP could facilitate access to credit through alternative collaterals or credit schemes and simplification of processes for accessing loans to lessen transaction cost.*

2. *Assumptions held by business networks/service organizations that women and men entrepreneurs face the same constraints and opportunities.* The assumptions are partly abetted by the absence of a discussion of gender-related issues in industry profiles, supply or value chain analyses, and similar business studies.

RELEVANCE TO THE CIDA PROGRAM: *Expected Result 2.2. Pearl2 has produced a video material that highlights the message that addressing gender equality makes good business sense, which can be used in raising the awareness to gender issues of BSOs and SMEs. Pearl2 had included sex-disaggregated data in its State of the Sector Reports, but no gender analysis of constraints and opportunities facing women and men entrepreneurs in the sector. Meanwhile, the industry profiles produced so far under PRIME have no mention of gender issues at all.*

3. *Limited access that women have to non-financial resources, particularly information about product standards, improvements in technology, and available services from government, business service or industry organizations.*

RELEVANCE TO THE CIDA PROGRAM: *Expected Results 2.2 and 2.4. So far, the Business Advisory Project (CESO-BAP and PBSP-BAP) has been providing direct business advice to either specific enterprises or cluster of enterprises, and has been targeting women-dominated SME clusters. Pearl2 has set gender equality targets for participation in its project-supported activities, including trade fairs, capacity development, and the like. It has likewise encouraged business service organizations to promote and support women entrepreneurs and women leaders in policy-making bodies.*

PROGRESS, RESULTS AND ISSUES

The gender equality monitoring conducted in May 2007 focused on the progress made by the five PSD projects vis-à-vis gender equality; their management, implementation, and monitoring and evaluation (M&E) processes; and emerging results and lessons that were identified by the project and/or the Gender Equality Adviser.

During the period covered by this report, the projects that were fully operational were collecting and reporting sex-disaggregated data. Ever since the May 2006 monitoring report, however, other important movements have been noted (see annex, for details). Some of the progress had been in such problem areas as poor gender equality results reporting and lack of an operational gender equality strategy that includes a sound gender analysis of the issues relevant to the project.

First, two projects (PRIME and BAP) have drawn up their *formal* gender equality strategy, although probably a few years later than expected. (IFC-PEP and Pearl2 have outlined their strategy in their respective Project Implementation Plans [PIP], while ILO-PYEP has “equal participation of women and men” as an implicit gender strategy.) The BAP 2006 gender equality strategy reaffirmed the two-pronged strategy that BAP has adopted from the beginning—advocacy with client-enterprises, for them to provide opportunities to both women and men; and “gender equality as a project,” or consciously assisting women enterprises—and strengthened the monitoring and reporting of gender

equality initiatives and results. It also came with specific immediate actions that CESO-BAP and PBSP-BAP would take. These actions have yielded some results and have shown PBSP-BAP in particular, that follow-up steps are needed to prepare its volunteer advisers to use the gender equality information in the Business Diagnostic Report (BDR) and to realize that solving business problems might require responding to gender issues first.

Second, two projects (BAP and IFC-PEP) have formulated tools that would guide the project in analyzing the gender dimension of future subprojects or interventions, while a third (PRIME) has completed a tool (the PRIME Capacity Indices, or PCI) that would track the progress made by PDAP, the Business Development Service Providers (BDS), and the RECs along key domains, including GAD or women's participation. A fourth project (Pearl2) has produced a video that could be used to encourage BSOs and SMEs that taking steps to promote gender equality can be beneficial to the business as well.

Third, two of the three projects that will be ending in 2007 or 2008 have begun documenting and reporting evidences of gender equality results. For probably the first time, the BAP annual report contains more discussion of gender equality initiatives and emerging effects of assistance to individual or SME clusters. With the help of a Canadian graduate student, Pearl2 has one case study that traces the flow of funds and employment generated down the value chain of an export product. Two similar value chain analyses are being prepared by Filipino business student interns.

And lastly, two projects have been instituting strategies for sustaining their GAD initiatives. CVED or PBSP-BAP has taken over the business advisory activities of BAP although PBSP-BAP still needs to master the project's clustering approach. Crafting the project's gender equality strategy in mid-2006 came at a perfect time for PBSP-BAP, and reportedly helped to strengthen the winding down operations of CESO-BAP. Meanwhile, Pearl2 has put in motion a sustainability and communication strategies for its gender equality business case initiative.

All these efforts have contributed to the achievement of a number of results that improve the gender equality situation and address very specific gender issues. The matrix in the annex shows the results per project, which can be summarized as follows:

- *Enhanced capacity of project staff to incorporate gender equality in project analysis and M&E tools.* This is evident in the ability of the PRIME staff to incorporate GAD indicators in the PRIME Capacity Indices, and the openness of the PBSP-BAP staff to the inclusion of gender equality filters in the Business Diagnostic Report of BAP. The development of a gender-sensitive BDR also demonstrates the usefulness of delivering capacity development inputs on gender equality outside a formal training mode, that is, during meetings or monitoring visits by the Gender Equality Adviser and the Post Officer.
- *Improved opportunities for women and men to gain skills as trainees, facilitators or trainers.* In ILO-PYEP, women have been given about the same chance as men to be trained or certified as Start Your Business (SYB) trainers (53% women) and Know About Business (KAB) facilitators (56%). In CESO-BAP, women account for almost half of the owners and/or managers trained by Canadian EAs in client enterprises.
- *Greater access of women entrepreneurs to information/advice and markets.* CESO-BAP has targeted among its clients clusters that were dominated by women-owned enterprises or with enterprises that employ mostly women, which probably resulted in women accounting for half of the clients assisted by the EAs. The BAP clients—women and men—received specific technical assistance based on a business diagnostics: streamlining

of bookkeeping and financial management system, time and motion study to make the work flow more efficient, advice to invest in a more efficient equipment or production technology, and improvement of work conditions to build workers' loyalty. Pearl2, for its part, has supported the holding of trade fairs and participation of SMEs and BSOs in international and regional trade fairs. To date, the project has funded the participation of 541 women to such fairs. Women constitute about 59% of all Pearl2-supported trade fair participants. They also account for almost 57% of all participants in Pearl2 workshops and training programs.

- *Increased employment and income opportunities particularly for women.* The case study that was undertaken by Pearl2 to generate information about how its interventions have contributed to poverty reduction suggests that women (who are mostly found among the gatherers) have equitably shared in the money that flowed down the chain, and their earnings have doubled as a result of the increase in economic activity by 70% throughout the supply chain. BAP, which works directly with SMEs or SME clusters, reported that the BAP assignments have increased direct employment by 589 new jobs, of which 73% went to women, and an additional 722 subcontracting jobs, a substantial number of which may have also gone to women.¹

A significant portion of the employment generated by the PSD projects may not only be in the formal, socially-protected sector, but also in the informal, unprotected sector, where much of subcontracting takes place. The latter can result from "traditional" organization of work, or it might be a consequence of technical advice to SMEs. To improve sales or income, some business advisers might focus on enhancing labor productivity through reorganizing work: shifting some parts to the home, so that "women can work at their own pace" or can "arrange their time division between home and 'work' better." However, shifting the basis of payment from fixed salary or wage to piece-rate may be *informalizing labor*. This can happen when the new work arrangements are accompanied by deterioration in work contracts of some workers, as when employers extend government social security and health insurance coverage to their regular, salaried workers, but not to piece-rate workers. Care should be taken to ensure that projects adhere to the CIDA Philippines PSD objective of helping to create *decent jobs*, not just any kind of work.

The areas where more emphasis should be given are:

- Allocation of resources for the hiring of part-time GAD experts who can provide critical inputs during project implementation;
- Incorporation of gender analysis in industry or sector reports that will be used for industry or sector planning;
- Choice of strategic interventions that can help achieve expected, substantial gender equality results; and
- Application of tools that have already been developed and building of commitment and capacities within the project for managers and/or staff to use the tools.

¹ Based on additional data for fiscal year 2006-2007 supplied by CESO-BAP, the high positive impact on women's employment was most evident in women-dominated clusters in the Visayas, where much of the new jobs were created. In Mindanao, where 58% of the workers hired by the SME clusters assisted by the project were men, many of the additional or new jobs also went to men.

ASSESSMENT OF PROJECT MANAGEMENT AND IMPLEMENTATION

Part of the focus of the May 2007 monitoring activity was the assessment of the gender-responsiveness of project implementation using the Philippines' *Harmonized Gender and Development Guidelines*. Launched in 2005, the *Harmonized Gender and Development Guidelines* covers various stages of the project cycle. It has been endorsed by the Philippine Development Forum in 2006 and again in 2007, and it is being actively promoted by the Philippine government.

The checklist for project design is used to ascertain the project's quality at entry for gender equality. The maximum GAD score is 20, with the actual score interpreted as follows: less than 4.0, GAD is invisible in the project design; 4.0 to 7.9, project design has promising GAD prospects; 8.0 to 14.9, the project design is gender-sensitive; and 15.0 or more, the project design is gender-responsive.

In mid-2006, the Gender Equality Adviser assessed the project approval documents and project implementation plans of all CIDA projects as part of CIDA's GAD monitoring report to NEDA. The GAD quality-at-entry rating for the PSD projects appears in the first column under "GAD rating" in the matrix annexed to this report. The second GAD rating pertains to the result of the assessment of the management, implementation and M&E of the projects monitored.

For the project implementation and monitoring and evaluation phase, two checklists of the Guidelines were applied: Box 16 for project management and implementation and Box 17 for M&E. The key elements of the combined checklists are as follows:

1. Supportive project management and leadership
2. Technically competent staff to integrate GAD in the project, or willingness to tap external GAD expertise
3. Committed Philippine partner (especially government agency)
4. GAD implementation processes and procedures
5. Inclusion of indicators that measure gender differences in outputs and outcomes
6. Sex-disaggregated and gender-related information in database
7. Gender equality and women's empowerment targets met
8. Efforts to address gender issues arising from its implementation
9. Participatory monitoring and evaluation processes that include meeting or consulting with women and men beneficiaries

Box 16 covers the first four elements, while Box 17, the other five. Each of the elements has a maximum score of two (2), except for the seventh element which has four (4). The total maximum score is 20, and the actual score can be interpreted in the same way as the GAD rating for project design.

Of the five PSD projects monitored, only three could be assessed using the combined checklists. In the case of PRIME, it was too soon to expect result, thus element #7 was not applicable, pegging its maximum possible score at 16. In the case of IFC-PEP, the project has recently begun its subprojects, it has no major government partner (making element #3 inapplicable), and the monitoring system has yet to be finalized. For IFC-PEP, therefore, only Box 16 was used, but the maximum possible score was reduced to 6 points.

The five projects as designed were gender-sensitive or better. They rated well, with the lowest score at 9.0. The three projects that were designed before 2005 got scores ranging from 9.0 and 10.5. However, in 2006 they strove to put gender equality mechanisms and strategies in place that would help produce gender equality results. In all three projects, the GAD rating has risen during project implementation.

In sharp contrast, because the more recent projects were able to use the Guidelines during PIP preparation, their quality at entry rating was better, and they had been adjudged as potentially gender-responsive projects. The two projects, however, have been slow in getting the gender equality mechanisms in place, applying the tools, or identifying priority gender equality strategies. As a result, their GAD rating at the implementation phase dipped, suggesting a lesson that *while quality at entry rating is important, it is probably as critical, if not more so, to get the gender equality elements right during project implementation as well.*

LESSONS LEARNED

The project matrix in the annex enumerates lessons from the experiences of the PSD projects to date. In addition to these lessons identified, a review of the completed projects and the ongoing projects suggests several factors that help promote gender equality in CIDA projects.

1. For projects to be gender responsive, it is not enough to have an excellent design—one that incorporates gender analysis, identified gender issues and strategies, and that incorporates gender equality in the logical framework analysis. The next test will be in the implementation of the project, which will require a clear, operational gender equality strategy that is based on a good analysis of gender issues that are relevant to the project; availability of tools that will guide project staff and partners in the analysis and design of gender equality interventions, willingness to tap GAD expertise to provide continuing technical inputs to the project, a monitoring system and database that incorporate gender equality indicators and sex-disaggregated and gender information, clear strategies for achieving gender equality and women's empowerment results, and a strategy for sustaining gender equality initiatives and results of the project. All these involve commitment from the CEA and the project implementation team, and the support of the Project Team Leader at Headquarters and the officer at the Post.
2. Gender equality strategies to be truly meaningful need to be developed as concrete plans for the project are being developed. This will ensure that gender equality targets are part of the operational implementation or work plan, resources are allocated to produce these targets, and activities are supported that will contribute to achieve project results. Among the results should be enhanced gender equality in participation, access to and control of resources and benefits, and more gender-equitable workplace practices.
3. Project-contextualized inputs in gender analysis, planning, monitoring and evaluation, and reporting need to be provided by the CEA or similar implementing agency to the project in the first year of project implementation. These inputs have reportedly helped teams translate "gender equality" into operational and practical terms. As the BAP experience suggests, the project could have benefited greatly had the teams developed the capacity to do this early during the project life.

4. Gender equality tools (gender equality criteria or guidelines, business diagnostic report, capacity indices, video and case studies) provide projects with practical guides for analyzing and responding to gender equality issues and for tracking and capturing progress and results. These tools, however, need to be animated. Project managers, staff and partners have to be animators, able to use and apply the tools and to design gender equality interventions so as to extract the maximum utility from the tools. Different modes of developing capacities need to be explored.
5. Industry profiles, analyses of value chains and status of sector reports are important bases for sector or industry planning. Because of this, it is important to incorporate not only sex-disaggregated employment data at various layers of the chain, but, as well, a gender analysis the industry or sector, and the constraints, needs and opportunities faced by women and men entrepreneurs at different parts of the chain.

Four lessons that were noted in the November 2006 gender equality monitoring report on the CIDA governance projects are also salient to PSD projects. These are:

1. Commitment of the project team leader (PTL) to pursue gender equality issues with the CEAs and the project management offices. Periodic queries about how the project is doing on gender equality issues as part of the PTL's monitoring questions have made projects aware of the importance of promoting gender equality and/or addressing gender issues relevant to their projects.
2. Instructions from the Country Program Manager for PTLs and other officers from HQ to touch base with the CIDA/PCCO Gender Equality Adviser. Where the instructions were observed, the meetings have kept gender equality in the agenda of missions from HQ, and have guided the missions on issues that need to be discussed with the projects.
3. Support to gender equality by the Post, as Post officers are the ones who are in constant and direct contact with the projects. The Post officer in charge of the PSD portfolio has been consistent in his advice or instructions to the projects to identify the gender equality problem that they need to address and to take the necessary action to respond to it. He has also instructed the monitor for PRIME to meet with the CIDA/PCCO Gender Equality Adviser before his monitoring visits and to consider gender equality in his monitoring activities. As a result, the PRIME monitor's reports have highlighted the gender situation in the RECs and sectors assisted by PRIME and recommended possible action that PRIME can take to achieve its gender equality target: gender-specific targeting of RECs, as most of the RECs it is working with have very few women members.
4. Translation of the project's gender equality strategy into operational terms by the CEAs and their field representatives and consultants.

ANNEX

Developments, Results and Lessons from CIDA Private Sector Development Projects

(The GAD rating is based on the application of the *Harmonized Gender and Development Guidelines* to the project design/implementation plan for the quality at entry rating, and for the second rating, on project implementation and M&E for the period June 2006 to May 2007.)

| Project (Duration) | GAD rating | | Developments during the monitoring period and comments | Emerging results and lessons |
|--|---------------------|---------------------------|---|--|
| | Quality at entry | Implementation and M&E | | |
| CESO-BAP and PBSP- BAP (formerly known as CVED) (2003-2008) | 9.0 | 11.8 13.0 | <p>Followed through on the plans made during the June 2006 gender analysis and planning workshop. Specifically,</p> <ol style="list-style-type: none"> 1. The project has formulated a gender equality strategy for the remaining life of the project that, as a result of the gender analysis done by the project, includes as key gender equality results (1) greater access by women to and control over credit, (2) greater access of women entrepreneurs to training and professional development opportunities, (3) increased participation of women in decision-making in their respective sectors, (4) strengthened capacity of the project clients to promote gender equality, and (5) reduction of discriminatory practices against female workers and improved work conditions. 2. PBSP-BAP has revised its Business Diagnostics Report, by including a number of gender equality and environment filters, and reporting tools. 3. Expert advisers are now being given by the CEA written instructions on gender equality issues, while volunteer advisers (VAs) of PBSP-BAP are more systematically being oriented on gender equality and the environment. Some VAs participated in the March 2007 session on gender equality and environment. (In June, the project had begun to conduct orientation sessions on gender equality to its VAs in different island groups.) 4. In addition to the continuous collecting and reporting of sex-disaggregated data, CESO BAP is preparing case studies to capture results of assistance to clusters, such as | <p>Emerging results: Systematic gender equality initiatives began in mid-2006, but some results have already been reported and/or noted:</p> <ul style="list-style-type: none"> • Greater commitment to promoting gender equality, particularly in the case of PBSP-BAP. • Enhanced appreciation/awareness among CESO-BAP and PBSP-BAP staff of ways of integrating gender equality in their project, including at M&E • Improved clarity in how to promote gender equality • In a few cases where the revised BDR was used, gender issues were flagged, potentially helping VAs to respond to the issues. • Realization among VAs that they could have responded better to gender issues in their past assignments had they known how to identify the issues in the first place. • Some gender results at the cluster/enterprise level, partly resulting from targeting women-dominated clusters: improved efficiency of operations in women enterprises, increased employment of women (and men) workers, and better working conditions, particularly for women workers. <p>Lessons:</p> <ul style="list-style-type: none"> • Gender equality tools are good, but the staff must have the skills to use the tools and the VAs the skills to address the gender issues identified in the |

| Project (Duration) | GAD rating | | Developments during the monitoring period and comments | Emerging results and lessons |
|--|---------------------|---------------------------|---|--|
| | Quality at entry | Implementation and M&E | | |
| | | | <p>improved efficiency and production of women-dominated clusters or enterprises, enhanced labor productivity of women workers, etc.</p> <p>5. The annual project progress report for 2006/07 included the following information: women VAs account for 42% of the VAs in the CVED roster; women constitute almost half of the client-enterprise managers and staff trained by CESO-BAP EAs and staff; and 73% of the new jobs (direct employment) generated as a result of the BAP assignments went to women.</p> <p>6. Not reported but available from the CVED reports and data base are the following information:</p> <ul style="list-style-type: none"> • 58% of the clients (owners/managers) in Mindanao were women; for Luzon and the Visayas, the figure is lower (49% and 48%). The percentage of client-enterprises that were women-owned or managed was highest in tourism (Visayas and Mindanao), food processing (Luzon, Visayas), and small-scale manufacturing (Mindanao) and services (Luzon). | <p>BDR.</p> <ul style="list-style-type: none"> • The project could have benefited more (i.e., clearer idea as to how to integrate gender equality in the project) had the gender analysis and planning workshop been given at the start of the project. <p><i>Comments:</i> To improve sales or income, some business advisers focus on enhancing labor productivity through reorganizing work (shifting some parts to the home, so that “women can work at their own pace” or can “arrange their time division between home and ‘work’ better”) or shifting basis of payment from fixed salary or wage to piece-rate. These new work arrangements can <i>informalize labor</i>, particularly when these result in deterioration in the work contract, as when employers extend government social security and health insurance coverage to their regular, salaried workers, but not to piece-rate workers.</p> |
| Pearl2 (2003-2007; extended to November 2008) | 10.5 | 10.5 | <p>Project efforts have focused on the sustainability strategy of knowledge products, services and approaches (such as the production of the State of the Sector Reports, or SSR; delivery of training courses developed by Pearl2, like the Executive Directors Series); and gender equality initiatives. The SSR activity that is being turned over to partner institutions includes the incorporation of sex-disaggregated data, but not the analysis of needs and constraints faced by women and men entrepreneurs in the sector.</p> <p><i>Sectoral enhancement component:</i></p> <p>1. The project has produced a video to help make a business case for gender equality. After it was shown to different types of audience (DTI and other government agencies,</p> | <p><i>Emerging results:</i></p> <ul style="list-style-type: none"> • It is too early to expect any gender equality results from the business case initiative. • Three Pearl2 partner institutions interviewed in May 2007 were aware of gender equality as a cross-cutting theme, but they interpreted this mainly as gender balance in participation in activities and collecting and reporting sex-disaggregated data. • Based on the single case study, the following results were noted: <ul style="list-style-type: none"> • Gatherers (61% of whom are women) have equitably shared in the funds that flowed down the chain. |

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| | | | <p>business groups, Women's Studies and GAD practitioners, CIDA partners, and the ODA Gender and Development Network), there was a strong demand for the material. As Ed Sutherland ruefully noted, the video has been disseminated before a mechanism for its use (in training sessions, meetings, etc.) has been developed.</p> <ol style="list-style-type: none"> 2. Pearl2 contracted Isis International-Manila, a feminist communications group, to prepare a communications strategy for Pearl2, including preparing materials for promoting gender equality among BSOs and SMEs, pre-testing these materials, conducting session, and developing a process of replication. The strategy should stress key gender equality principles to promote gender-equitable business practices among SMEs (see second lesson). 3. SSR surveys have sex-disaggregated data, but the report needs to enhance gender analysis to identify gender issues in the industries. 4. Pearl2 also maintains sex-disaggregated database re participation in trade fairs, product development and other BSO activities subsidized by Pearl2, but again there is a need to improve gender analysis and translate the analysis into action. 5. The project has anecdotes about increased employment and sales as a result of participation in trade fairs, but project documentation does not have a particular slant on impact of participation in trade fair on women and men entrepreneurs. <p>Partnership development facility (PDF)</p> <p>There are no expressed gender equality results or indicators for this component, but the project continues to track gender composition of participants in trade fairs organized by PDF partners, international business missions, and local and international trainings. There are anecdotes about increased</p> | <ul style="list-style-type: none"> • Per capita income of workers might not have changed, but the number of people earning an income (particularly among the gatherers) has doubled as a result of the increased economic activity (more than 70% over 5 years) that was noted throughout the supply chain. <p>Lessons:</p> <ul style="list-style-type: none"> • The incorporation of gender analysis of the industry or sector as part of the SSR should be made prior to the transfer of the SSR product/technology to partner institutions. • Project partners' understanding of what promoting gender equality means has been limited to participation and data collection/reporting. Isis and Pearl2 will need to enhance the present interpretation to include, probably more importantly, the project's core messages about gender-equitable business practices: <i>equal pay for work of equal value, reconciliation of work and family life, occupational safety and health related to positions predominantly done by women, job security, initiatives for education, and use of new technologies.</i> <p>Additional lesson: On the timing of project activities, E. Sutherland noted that if he were to do a similar project, he would probably begin with sectoral enhancement first, look at the gaps, and based on these, craft the subprojects to be supported by the PDF.</p> |

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| | | | <p>employment and sales as a result of participation of women and men SMEs in trade fairs.</p> <p>Monitoring and evaluation:</p> <ol style="list-style-type: none"> 1. Sex-disaggregated participation data (training, trade fairs) and membership/leadership data continue to be collected. 2. A case study using value chain analysis was done by a Canadian graduate student to trace the effects of project assistance to an export company in Cebu City with suppliers and sub-contractors in Bohol province. There was a conscious effort to include gender-related information, but the analysis of the gender data can be enhanced. Now, Filipino business student interns are doing supply chain analysis of bamboo furniture and fashion accessories. 3. Progress reports present sex-disaggregated data on consultants commissioned by Pearl2, but it is not clear how this data can be used. 4. Consultants commissioned to conduct evaluation studies are required in their Terms of Reference (TOR) to state Pearl2's contribution to gender and environment. | |
| ILO-PYEP (2005-2007; extended to September 2007) | 9.0 | 10.5 | <p>The project has but a few months to run. During the monitoring period, the project has accomplished the following:</p> <ol style="list-style-type: none"> 1. It organized a GAD orientation session for consultants in January 2007. It was attended by two consultants and some partners who were implementing demonstration projects that have either ended or about to end. 2. The project has hired a new national coordinator who, like the previous coordinator, had some GAD training. There were plans in early 2006 to hire a part-time gender equality consultant, but this never materialized. While the project | <p>Emerging gender equality results:</p> <ul style="list-style-type: none"> • Some 70 Start Your Business (SYB) trainers have been certified, of whom 37 (53%) are women • Some 78 Know About Business (KAB) facilitators have been trained, of whom 44 (56%) are women. In addition, an average of 65% of the students who were pilot testing the KAB in their TLE subject were female. • The gender issues written up in the Youth Profiles were reportedly considered in the crafting and implementation of local strategies, programs or |

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| | | | <p>could draw on the ILO/Manila specialists, including the GAD specialist, these specialists cover more than just the Philippines.</p> <p>3. Efforts to integrate gender equality have involved mainly inviting young women and men to trainings, consultations and other project activities; collection and reporting of sex-disaggregated data on participants in trainings, consultations, and forums; and use of non-sexist language in training materials and manuals. (In April/May 2006, two training of facilitators for Know About Business [KAB] reportedly included a specific session on gender.) The first two (participation and sex-disaggregated data) are reflected in partners, consultants, and project reports.</p> <p>4. The contracts of consultants or external collaborators include a gender equality proviso. Apart from sex-disaggregated participation data in consultants' reports, generally very little mention is made of gender equality in the content of trainings. The January 2007 GAD session for consultants drew only two consultants. One consultant who did not attend the session said that the notice came too late and he already had other meetings scheduled.</p> <p>5. The youth profiles that were prepared by a consultant included sex-disaggregated data and a discussion of the aspirations and employment and entrepreneurship problems faced by young women (especially unemployed married young women) and men. Moreover, surveys and focus group discussions to generate information for the profiles sought the participation of young women and men.</p> <p>6. In January 2007, the project reported that it has allocated some funds for the development of PYEP's Gender Framework. As of mid-May 2007, however, nothing had been done to develop the framework.</p> | <p>solutions for the youth in project sites. However, at least one LGU partner wanted more data to better understand and use the findings for her city.</p> <p>Lessons:</p> <ul style="list-style-type: none"> • The workshop for project partners that took place in January 2007 came too late, just a few months away from the original end of the project. Participants from demonstration subprojects claimed it was too late to make use of what they learned from the workshop. • Merely instructing partners or consultants to attend to or promote gender equality in their sub-project or activity may not be adequate. Because they are asked to report sex-disaggregated information on trainees, beneficiaries, etc., they often assume that doing this would be complying with the gender clause. • The project should have provided guidance on more substantive treatment of gender equality issues in its subprojects. It could have also explored how GAD initiatives of its partners (e.g., Centex in Marikina City) could have been tapped for a gender-sensitive way of promoting youth employment. • The KAB activity provided the ILO project the opportunity for ILO's first partnership with the Department of Education (not part of the original project partners). However, the project should have exerted more effort to draw in ILO's traditional partners. This could be done in the extension period by involving the ILO sector specialists more. • Had LGU partners been consulted, they could have provided inputs to the design of the youth profiling survey and focus group discussion. |

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| PRIME (June 2005- 2010) | 15.0 | 8.7/16.0 | <p>Project efforts related to gender equality began only in late 2006. So far, the project has accomplished the following:</p> <ol style="list-style-type: none"> 1. Prepared the PRIME Capacity Indices (PCI) for tracking performance in the different components/partners of the project. A review of the PCI shows that the GAD indicators were included in the different forms, as follows: <ul style="list-style-type: none"> • For BDS providers, a set of GAD indicators is part of the organizational capacity domain. GAD has a weight of 10%. Minimum and developmental targets have been identified for participation (number of women in policy making, governance and management; and number of women staff) and projects/ programs related to women and development in rural economies. • For RECs, “women’s participation” is given a weight of 10%. Minimum and developmental targets have been identified for two participation indicators (% of women in membership, and number of women in governance and management). As in the case of BDS capacity indicators, the women’s participation indicators for RECs form part of organizational capacity. The REC indicators, however, also include a gender indicator under “Enterprise Capacity” (number of women with micro enterprises). 2. Identified a staff member as gender equality focal person, in addition to her other responsibilities in the project. So far, four female staff members have been named to the post since July 2005, and none has acted as focal person for more than nine months. 3. Contracted a gender equality expert to help craft the project’s gender equality strategy, something that the project should have done at the onset of project implementation. By end of May 2007, PRIME still has to set its priority gender equality strategies for the current | <p><i>No gender equality results as of yet. The project has been very late in formulating its gender equality strategy and it has yet to identify its priority gender equality interventions for the present fiscal year.</i></p> <p>Lesson: Gender-responsive project design does not automatically mean that the project would be managed and implemented in a gender-responsive way and that it would produce gender equality results. The implementing partner needs to have in place—as soon as possible—the various elements that would contribute to the achievement of gender equality deliverables.</p> <p>Comments:</p> <ul style="list-style-type: none"> • PRIME has committed resources to gender equality by hiring a consultant to prepare the GAD strategy. Given the apparent difficulty of the project to get gender equality initiatives on the ground, it could hire a part-time gender equality adviser or consultant who could provide critical gender equality inputs. • Since an operational gender equality strategy is being finalized just now, gender equality is being forced to fit into project components and activities. PRIME needs to decide as soon as possible what the focal gender equality interventions would be for the year. • Industry profiles and analyses of value chains should incorporate analyses of relevant gender issues for these reports to be useful in identifying opportunities for gender equality interventions. • The BDS-level PCI could have under M&E documentation of success stories that focus on |

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| | | | <p>fiscal year and to reflect this in this year's work plan.</p> <p>4. Produced industry studies that will serve as a basis for planning for the project intervention in the industry. Not one of the published profiles, however, includes a gender analysis of the industry. Moreover, the TOR for the value chain analysis consultant does not require an analysis of relevant gender issues.</p> | <p>gender equality, and periodic review of the gender strategy; and inclusion of GAD tools in Indicator B6. For REC, there may be a need to track capacity of MEs and organizational capacity of RECs, by sex of the operators/owners. These data can feed into the success case stories and GAD monitoring.</p> |
| IFC-PEP (2005-June 2009) | 15.0 | 4.0/6.0 | <p>Some gender equality mechanisms have been put in place during the monitoring period. Specifically:</p> <ul style="list-style-type: none"> • GAD guidelines for program managers, which provide gender analysis questions at different points of the cycle; this took into account the Philippines' harmonized GAD guidelines. • Named a gender equality focal person (A. Fausto) and hired a short-term consultant to craft the GAD guidelines. The project plans to tap IFC gender resources as needed. | <p>Programs are just rolling out, and at least one program has applied the GAD guidelines to understand and mitigate potential risks. It is too soon to expect any gender equality result.</p> |