

# **ANALYSIS OF GENDER AND INDIGENOUS ISSUES WITH REGARD TO USAID/BOLIVIA'S 2005-2009 STRATEGY**

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# **ANALYSIS OF GENDER AND INDIGENOUS ISSUES WITH REGARD TO USAID/BOLIVIA'S 2005-2009 STRATEGY**

## **I. INTRODUCTION: BACKGROUND AND SUMMARY OF OBJECTIVES**

### **Purpose of the Report**

The USAID/Bolivia Mission has made significant progress in integrating gender into its new strategy, into most of its activities, and into recent RFAs and RFPs for new and follow-on activities. This report is intended as a resource guide to support the Mission in its subsequent efforts to ensure that gender and sociocultural issues are integrated into the new activities under the recently approved strategy. Therefore, the report provides: 1) illustrative statistical information on gender and ethnic disparities in economic and social sectors; 2) comments on the Strategy by sector with suggestions for strengthening some of the strategic directions of the Missions program with regard to gender and sociocultural inclusion; 3) a summary of project-level interventions that support gender and sociocultural inclusion; 4) published and web-based resources on gender and indigenous issues by sector; and 5) training materials used in the workshop on August 17, 2004 in Spanish and English. A logical next step in this process would be to work with individual SO Teams and their activity implementers to develop action plans for gender and sociocultural inclusion. Many current activities, such as Bolfor and Concade already have gender action plans, and many others, such as most of the health and democracy programs have gender strategies or components. There is an opportunity, with new activities, to make sure that gender and indigenous issues are integrated directly into initial work plans and start-up activities and into project-level monitoring and evaluation plans.

### **Background**

Early strategy design period, the USAID/Bolivia received technical assistance from Deborah Caro who conducted an initial analysis of Strategic Objective teams' concept papers and other documents and provided recommendations on ways to integrate gender into its strategy. The consultant also met separately with each of the strategic objective teams to learn about their program and activities analyses and provided recommendations for the implementation phase of the strategy.

Since the completion of the earlier consultancy and as a result of the 2003 social crises in Bolivia, further analyses by USAID have concluded that social exclusion and poverty are among the main causes for conflict. Social exclusion is an underlying cause of much of the political, economic, and institutional instability in Bolivia. Despite recent efforts to create a more inclusive, responsive government, the legacy of Bolivia's long history of discrimination based on ethnicity and socioeconomic class leaves many citizens feeling isolated and alienated, with limited access to social services and limited political participation. The indigenous population, women, and the poor are the principal, often overlapping, groups which suffer the consequences of social exclusion.

## **Purpose of the Consultancy**

- To support the Mission to identify gender-based and cultural constraints and opportunities that may affect achievement of its strategic objectives or affect gender and social equity outcomes.
- To develop guidelines for addressing these constraints and opportunities in the design of Mission activities linked to the strategy.
- To identify strategies that increase women's and men's (especially those who are indigenous, poor, and young) participation to enhance their legal status, improve their health, increase their income, enhance their decision-making relative to more powerful groups, and support their sustainable use of resources.
- To help SO Teams to develop indicators to measure increased social inclusion

## **Tasks:**

- Review USAID/Bolivia's draft strategy to assess how gender and indigenous issues have been incorporated, and make recommendations for how the issues identified in the strategy can be appropriately addressed in Mission activities and tracked through its PMP in order to more effectively overcome gender and social constraints;
- Work with the Mission SO teams to identify social (especially gender-related) and ethnic constraints and structural inequalities in Bolivia that prevent women and men from fully benefiting from and participating in the Mission's program. In conjunction with the SO teams and their implementing partners identify strategies to increase participation of and benefits for disadvantaged women and men in Bolivia;
- Work with the Mission strategic objective teams to develop indicators for the Performance Monitoring Plan to measure if the program is benefiting target groups, especially in terms of reducing social exclusion and increasing their access to services and benefits;
- Develop sectoral guidelines for addressing gender and indigenous issues in the design of activities under the new Strategic Plan;
- Provide a day-long training session for SO, contractor, and NGO partners on how to apply the sectoral guidelines in their activities. Work with interested groups through additional T.A. to apply the guidelines to their current and planned activities.
- Provide a 2 hour briefing to the Mission Senior Management Team on the Gender Requirements in the ADS and summaries of the sectoral guidelines developed with the SO teams.

## **Accomplishments:**

- ◆ Reviewed and Commented on the Strategy

- ◆ Prepared comments by SO for technical reviews in USAID/Washington
- ◆ Reviewed drafts of the Performance Monitoring Plans (PMPs) for each Strategic Objective
- ◆ Provided in-depth oral comments on the Democracy PMP to the task manager
- ◆ Reviewed strategic Plan of the Vice Ministry of Gender and collected statistical information from INE, CONAPO and Vice Ministry of Indigenous Affairs
- ◆ Held Meetings with Health and Democracy Projects and BTBC and interacted with CTOs of MAPA, AD, and Aid to Artisans to discuss how they are approaching gender and intercultural issues in program implementation.
- ◆ Trained 27 people on gender and sociocultural analysis.
- ◆ Interactive workshops with Socios En Salud and PROCOSI.
- ◆ Developed a list of resources on gender and indigenous issues by sector

## II. BASIC INFORMATION ON GENDER AND INDIGENOUS POPULATION THAT RELATE TO USAID'S PROGRAM

Social indicators demonstrate the great disparities that exist within the country between rural and urban populations, between indigenous and non-indigenous, and between men and women. I would suggest including the key MDG social indicators in here.

Here are some numbers that could be incorporated into the text to give it more of an evidence base. These statistics, largely taken from the Instituto Nacional de Estadística also provide some possible indicators for measuring the relative impact of USAID programs on men and women.

Income	Men	Women	Difference
Urban	Bs. 1351	Bs. 773	Women earn 43% less than men
Rural	Bs. 346	Bs. 95	Women earn 73% less than men

Source: *Análisis de la Equidad de Genero 1992-2002*, Clave Consultores 2003

Household Headship	Men	Women
Headship	75.56	24.44
Single parent households	8.38	67.41

Source: INE

Employment Sector	Men %	Women %	Difference
Economically Active population	68.13	41.41	
Formal	68.6	31.4	Two to one
Informal	48.7	51.3	Almost 3% more women
Domestic Service	3.1	96.9	Highly feminized
Extractive sectors (mining, logging, etc)	48.38	35.51	
Industrial sector	10.93	10.09	Equal
Service sector	40.7	54.4	

Source: INE

Land Titles	Men	Women	Both
1956-1960	98.8%	1.2%	unavailable
1996- 2001	23.8%	6.08%	58.4%

Source: *Análisis de la Equidad de Genero 1992-2002*, Clave Consultores 2003

Education	Men	Women
Rural Illiteracy	14.42%	37.91%
Urban Illiteracy	2.48%	10.01%
Urban School Attendance	83.97%	81.40%
Rural School Attendance	76.41 %	72.88%
Rural School Attendance 15-19	43.60%	30.74%
Average number of years of schooling (Urban)	10.1	8.45
Average number of years of schooling (Rural)	5.18	3.14
Secondary School Attendance (14-18)	52.5%	49.7%

Source: *Análisis de la Equidad de Genero 1992-2002*, Clave Consultores 2003

People without official documents	Men	Women
Total	23.28	32.71

Source: INE

Political Participation	Men	Women
Mayors	92.3%	7.7%
Council Members	84.9%	15.1%

Source: *Análisis de la Equidad de Genero 1992-2002*, Clave Consultores 2003

**¿En qué medida a Ud. le gustaría que el 2025 el presidente de todos los bolivianos (as) sea una mujer?**

	N	%	% Acumulado
<b>Nada</b>	389	10,7	10,7
<b>Poco</b>	1129	31,2	42,0
<b>Mucho</b>	1973	54,6	96,5
<b>No sabe/no precisa</b>	126	3,5	100,0
<b>Total</b>	3617	100,0	

Source: ECADI-03

**¿En qué medida a Ud le gustaría que el 2025 el presidente de todos los bolivianos (as) sea**

**un indígena?**

	N	%	% Acumulado
<b>Nada</b>	936	25,9	25,9
<b>Poco</b>	1129	31,2	57,1
<b>Mucho</b>	1404	38,8	95,9
<b>No sabe/no precisa</b>	148	4,1	100,0
<b>Total</b>	3617	100,0	

Source: ECADI-03

**¿En qué medida a Ud le gustaría que el 2025 el presidente de todos los bolivianos(as) sea una persona joven?**

	N	%	% Acumulado
<b>Nada</b>	253	7,0	7,0
<b>Poco</b>	813	22,5	29,5
<b>Mucho</b>	2461	68,0	97,5
<b>No sabe/no precisa</b>	90	2,5	100,0
<b>Total</b>	3617	100,0	

Fuente: ECADI-03

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**Fuente:** ECADI-03

### **III. COMMENTS ON USAID/BOLIVIA COUNTRY STRATEGIC PLAN<sup>1</sup>**

Overall the Mission has done a very good job of incorporating attention to gender and indigenous issues. I have tried to point out some ways to strengthen this focus and how it might be carried through in the design of new activities. I have prepared these comments for internal use only but would be happy to put them in a format that would be useful for the review of the Strategy later this month in Washington.

#### **Comments On Part III: Strategic Objective Narratives**

**SO1: Increased Confidence in Democratic Institutions** (Comments written in May 2004 for review of SO in Washington. The SO Team responded to these comments in June and to a large extent the PMP reflects the comments and the response)

The SO Team has made serious commitments to making gender integration and social inclusion high priorities as part of its overall commitment to supporting more equitable and inclusive judicial and political processes in Bolivia. The Mission expects to build on previous activities that included working with women legislators to develop a gender-focused legislative agenda and working with women municipal council members to strengthen their voice and vote. The Mission has also increased its focus on the special concerns of indigenous populations in Bolivia who are severely underrepresented politically and economically.

The frequent mention of these commitments throughout the document lays the groundwork for developing concrete strategies through the activities under each IR. The strategy would be enhanced, however by more specific analysis of the constraints facing women and men of different ethnic and class backgrounds in Bolivia and by the inclusion of indicators disaggregated by both sex and ethnicity to measure the impact of the Mission's Democracy Program on disadvantaged groups in Bolivia.

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<sup>1</sup> These comments were made prior to submission of the USAID/Bolivia Strategy to USAID Washington for Approval. The Strategy has since been approved. These comments are presented here for documentation purposes only and to guide any future development of activities. The rest of the report provides resources for integrating gender and sociocultural issues into activity planning, development of indicators for the PMP, and to guide implementation of ongoing activities.

**IR 1.1:** As the Mission seems to have been quite effective in putting many reforms in place (such as the CCP), a next step would be to monitor whether in practice the reforms guarantee equitable access and treatment for all Bolivians regardless of their gender or ethnicity, under the new codes. Similarly, the Mission’s innovative support for local conflict resolution through the “community justice system” would be strengthened by monitoring both equity of access and outcomes for men and women.

**IR 1.2:** It is not clear whether the new law permitting non-affiliated independent candidates will result in a more diverse legislative body or simply take the pressure off political parties to be more gender and socially inclusive in their selection of slates of candidates, and ultimately in the selection of president which the parties control with little regard to popular vote. Disadvantaged groups, especially those represented by independent candidates are unlikely to gain much power outside of the political parties. Given the relative uncertainty of the impact of these reforms on increasing representation for underrepresented groups, it is incumbent on the SO Team to disaggregate their indicators by sex, locality, and ethnicity (i.e. Number of encounters between representatives and their male and female constituents).

**IR 1.3:** The SO Team emphasizes the need to do more to integrate the needs of women and other disadvantaged groups in municipal political processes. This recommendation would be strengthened by an analysis of the constraints to participation faced by these groups and individuals and how to best overcome them. Disaggregation of information on participation, decision-making, and satisfaction would allow the Mission to track whether their equity objectives are being met.

**IR 1.4:** The SO Team’s focus on both criminal and civil oversight of corruption is critical for building social support for anti-corruption measures. The result would benefit from some prior analysis about who is affected by what kinds and venues of corruption. For instance, market women may rally in support of anti-corruption measures against municipal fee collectors, while rural communities may be more easily mobilized to denounce municipal authorities if there were clear procedures and channels for filing complaints. In order to broadly engage the public, the SO Team should encourage the GOB to address the different ways corruption affects people at different levels of Bolivian society. The Mission’s current indicator only measures white collar prosecutions and therefore is unlikely to capture the petty corruption that affects the majority of Bolivia’s poor and disadvantaged.

#### **Additional Comments from review of July 2004:**

IR 1.1 (p.17)

- Include indigenous and gender groups as monitors of justice reform
- Ensure that gender equity is also a part of community justice and work with indigenous groups to ensure that women participate in the process, have a voice, and regard the process as fair (this is also an objective of the Women’s Vice Ministry’s Strategic Plan: p. 13- *Acción 7.3: “Promover que en la aplicación de la justicia comunitaria en áreas rurales se respeten los derechos de las mujeres en el marco de la Constitución Política del Estado y los convenios internacionales.”*)
- Re illustrative activities (p.18)-

- Bullet 1: Forensic training should include modules on gender and cultural sensitivity
- Bullet 2: Civil society groups should include indigenous and gender rights groups
- Bullet 3: Study of commercial and administrative legal framework should include examination of gender-based constraints and entry barriers for women and indigenous entrepreneurs

IR 1.2 (p. 18)

- Second Paragraph: It would be useful to include actual numbers on indigenous and women members of Congress.
- Re illustrative activities (p. 19)
  - Bullet 2: Include women in training process for indigenous leaders. In some altiplano communities, there is still a parallel authority structure where male leaders have female counterparts in their wives. Within the communities, the couple, not the man alone, is recognized as occupying a position of authority. This provides an opportunity for training couples rather than male leaders only.

## **SO2: Increased Income for Bolivia's Poor**

The SO team provides a strong framework for addressing gender issues in its strategy by recognizing the need to “ensure that both men and women have unimpeded access and privileges in membership of producer associations and other aspects of economic life...” It would also be helpful to include gender and indigenous discrimination as key constraints limiting access of some groups to financial resources, agricultural technology, services, and export markets.

**IR 2.1:** Although the Mission's focus is now on the health and viability of the financial system rather than directly increasing access to credit for individual borrowers, it is still important to mitigate any barriers to financial resources based on gender or ethnicity, especially as more and more microcredit institutions become regulated.

Some questions to consider are:

- Are policies gender-equitable with respect to loan size and terms of lending?
- Is risk assessment applied uniformly to men and women regardless of their gender and ethnicity? For instance, are men encouraged to take out larger loans and therefore exposed to higher risk, or a women discouraged from taking out larger loans because they are perceived to not being able to handle larger amounts of credit? Do credit programs that mostly lend to women, because of smaller portfolios and a greater number of smaller loans impose tighter controls (e.g., village banking organizations) and higher costs that programs that lend mostly to men (e.g. agricultural credit institutions).
- Is there adequate support for different types and scales of financial and non-financial products that may respond to the different needs and interests of men and women and socioeconomic groups?

**IR 2.2:** The SO team states its intention to include women as full members in producer associations; it would be helpful to address how this will be accomplished. Women's participation in producers' groups is key to their gaining equitable access to markets and new technology. Under the proposed ID research, the SO Team has an opportunity to include examination of how the gender division of labor, economic decision-making and control of

resources within the household, community, and producer groups may affect the achievement of results or affect the relative status of men and women in different regions and among different ethnic groups.

Re PL 480 (p. 27): USAID should encourage and monitor whether Title II Cooperating Sponsors include both women and men farmers in community group analyses of needs, resource constraints, and opportunities and should identify any gender-based constraints to women participating or expressing their needs along with men's.

**IR 2.3:** It is not clear if efforts under the IR to increase the capacity of exporting businesses will also include assistance to and consideration of the special needs of small farmer producer organization and other producer associations such as artisan producer groups. Will support under this IR also include assistance to indigenous groups/communities that may want to get involved in tourism ventures? T.A. under this IR should also include examination of constraints that may affect men and women business owners differently, either because of their different roles and responsibilities, their different legal status, or the different size of their businesses. Once identified, it would be helpful to include T.A. to address the constraints (e.g., propose changes in discriminator regulations; provide support for the business sectors women's businesses tend to be concentrated in; or help businesses to access appropriate sources of capital).

**Re Indicators:** While most of the indicators the SO Team is using can not be disaggregated by sex, there are some instances where they could make the attempt. Income can be disaggregated by sex of household head and farm-level sales can be disaggregated by sex of direct beneficiaries.

### **SO3: Improved Health of Bolivians, Contributing to Their Quality of Life**

Comments on strategic approach: In a country where the maternal mortality rate (MMR) is still quite high, it is surprising that there is no mention of related data such as proportion of births attended by skilled providers or proportion of institutionalized births. Although it is unrealistic to measure MMR in a five year timeframe, it is still worth mentioning in the same way that IMR is cited in this section, especially as improving maternal health is a MDG goal and MMR is one of the Team's SO level indicators. I also recommend that gender inequality and ethnic discrimination be added to the list of constraints to improved health, especially as women's empowerment and overcoming intercultural barriers to healthcare are explicit dimensions of the strategy (as stated in last paragraph in this section on p. 31).

#### **IR 3.1:**

Re illustrative activities: the set of activities do not reflect the innovative approach described in the preceding narrative. It would be helpful to include a couple of illustrative activities that reflect attention to women's empowerment and community involvement. I am also curious as to why there is no mention of maternal health activities or activities that address a broader concept of reproductive health than family planning, such as prevention of STDs or intra-family violence under this IR. You might consider an indicator of women's empowerment under this IR.

**IR 3.2:** The Subheading is missing on p. 33 after the illustrative activities for IR 3.1.

It is not clear how clinical and community responses to maternal health will be linked as there is no mention of maternal health in IR 3.1. It would be helpful to expand the description of IR 3.2. What will be done explicitly to address some of the constraints cited in the introduction of the SO narrative? Is this IR really only about clinical protocols and better client-provider relations? Even if that is the case, it is not at all clear how the SO Team intends to accomplish these results. Will the SO Team target particular regions (i.e., of least coverage, greatest poverty, worst health indicators, etc)? The indicators for this section do not measure increased cultural responsiveness of the services.

Re illustrative activities: 2 out of 5 are focused on HIV/AIDS. Is that an accurate reflection of the balance of activities under this IR? Under bullet three, include gender in addition to cultural responsiveness. The wording of illustrative activities 2 And 3, in particular, reads more like sub-IRs or indicators than as activities.

### **IR 3.3:**

Re illustrative activities:

- Bullet 1: insert parentheses after “analysis” (including gender and sociocultural impact analysis)

I would add a bullet at the end on strengthening DILOS and community-level health oversight committees. This might even fit under IR 3.2 as a part of improving quality.

### **Re Indicators:**

The overall approach of the SO is quite innovative in the way the IRs are construed and with the focus on culture and gender as important dimensions of health programming. The indicators, however, do not reflect these innovations adequately. As suggested above, the SO Team might consider adding an indicator of women’s empowerment under IR 3.1 and an indicator of cultural responsiveness under IR 3.2. I also suggest disaggregating MMR by urban and rural in the same way as the other SO level indicators. The Team might also consider sex disaggregating % of children receiving ORT, % of chronic malnutrition, % of condom use with last sexual partner, % of infants with 3<sup>rd</sup> dose of pentavalent, % of population requesting VCT, % of patients who complete full cycle of DOTS in order to monitor any significant gender disparities in access to health care. Obviously breaking some of these indicators out by rural and urban where possible will also give an indication of how well the Team is improving quality and institutional capacity, especially in underserved areas. I appreciate the challenges presented by greater data disaggregation and the Team should make decisions based on feasibility as well as how useful the additional detail may be for assessing impact and for decision making.

### **SO 4: Forest, Water, and Biodiversity Resources Managed for Sustained Economic Growth**

The narrative of the SO does not reflect the strong emphasis on gender equity and social inclusion that has been integral to many of the environment activities supported by the Mission. Below I suggest some slight wording changes to at least draw attention to the fact that the SO does support activities that have integrated gender considerations into their design. In lieu of these changes, the SO Team may want to include a statement or two on how they will integrate attention to gender and cultural diversity into their activities, take into consideration men’s and

women's different knowledge and roles in natural resource management, and promote equitable access to program benefits.

p. 36 first paragraph: Under constraints, I would add inequitable access to land and to secure tenure in addition to inadequate land titling.

**IR 4.1** Consider rewording the next to last sentence of the first paragraph on p. 39 “The new forestry IR has been structured to address critical constraints facing the forestry sector, community based development needs **including attention to gender and social inclusion**, as well as to support the viability of the Bolivia forestry sector in general.

Under the illustrative activities: Bullet 4- In order to reflect the ongoing gender focus in the community development activities supported under the IR, I would insert n bullet 4 “Providing technical assistance **to men and women** in indigenous communities....”

I would do the same in bullet 5 – “...facilitating the participation **of men and women** in decision-making and promoting the use of improved forest management practices.”

**IR 4.2** I suggest changing local inhabitants in the first sentence in the first paragraph to “men and women” and the same for the second sentence: “Improved management with the direct participation of men and women in local communities contributes to ....”

Under the illustrative activities, I would follow through with the same wording change to again reflect the gender focus present in many of the activities, e.g., bullet 2, “Developing projects that are tailored to particular geographical areas, and to both men and women in indigenous communities, including...”

### **IR 4.3**

Re illustrative activities- bullet 1, again there is an opportunity to clarify that training is for both men and women professionals and students. If nothing else, it reminds the people who are going to design the activities that they should make these opportunities available to men and women and they should sex disaggregate data on the trainees.

Under this IR there is also a more substantive opportunity to examine men's and women's different roles in watershed management ( even urban watersheds have downstream rural users) and in urban sanitation and refuse management. There may even be some income generating opportunities that will contribute better management of refuse and waste within the urban watersheds.

## **SO 5: Licit Economy in Coca Growing and Associated Areas Increasingly Sustainable**

IR 5.1 Comments on SO 2 are broadly applicable to IR 5.1, particularly gender issues related to producer organizations, access to agricultural technology and services, access to markets, and with regard to potential gender-based constraints to trade for women-owned businesses. I would encourage the SO Team, when designing new activities, to ensure gender-equitable access to skills training, leadership development, grants, credit, and technical assistance.

IR 5.2 Similar comments apply to this IR. Municipal development activities should maximize participation of women and other groups who are usually at the margins of political participation and decision-making. The SO Team should support activities that make special efforts to engage these groups in training on administration and management of municipal services, planning and budgeting, and leadership. It should also ensure equitable access to land titles by making men and women aware that the law allows for women to own titles and for couples to opt for having both names on the title. There is a misconception that the law favors putting only the head of household's name on the title. If women have their names on individual or joint titles, they will have greater access to agricultural credit, greater confidence in investing in land development, and have greater security of tenure in the event of their husband's death.

IR 5.3- Again, as the activities are similar to those under SO 2, SO 3, and SO 4, the comments about gender integration apply equally to this IR. In addition it is probably worth examining any particular gender related issues and vulnerabilities with regard to health, justice, and environment that are particular to the area because of higher levels of conflict, a more transitory population, and drug processing activities.

#### **IV. TRAINING REPORT**

Twenty-seven USAID staff and contractors attended a day-long Gender and intercultural training conducted on August 17, 2004. The objectives of the training were to:

- 1) Become familiar and apply some gender and sociocultural analysis tools
- 2) Identify gender-based constraints and opportunities
- 3) Become familiar with the gender requirements in the ADS for incorporating gender issues into USAID policies, programs and activities
- 4) Apply a process for integrating gender into the program planning cycle

The morning was spent on learning about different domains of sociocultural and gender analysis and applying them to an analysis of a case study and then to the participants' programs. The afternoon focused on the ADS requirements and how to address them in the program cycle. Participants worked in sector specific groups: 1) Health; 2) Agriculture and Alternative Development; 3) Democracy and Governance; and 4) Microcredit, Artisan Development, and Trade. The only sector that was not represented was the environment, although the case study was based on an environmental project in Brazil. At the end of the day, participants had reworked an aspect of their respective programs and had filled out a form pledging them to a short-term commitment to follow through on an issue identified in the training.

The evaluation of the training was very positive. The participants were asked to state what they had liked, disliked, and what they would change. The results appear in the table below.

## EVALUATION OF TRAINING

<p>What I liked</p>	<ul style="list-style-type: none"> <li>➤ The subject, the concepts, the facilitator (2)</li> <li>➤ The open discussion about gender-based constraints in our projects</li> <li>➤ The possibility of analyzing what we can do to improve projects by including a gender perspective</li> <li>➤ The dynamic and participatory methodology</li> <li>➤ The small groups with people with diverse ideas</li> <li>➤ The general ambience</li> <li>➤ The gender analysis</li> <li>➤ Reflection on internal and external factors that affect gender relations</li> <li>➤ Exchange of experiences</li> <li>➤ Meals and snacks</li> <li>➤ The matrices that helped us to put our ideas in order; gender analysis</li> <li>➤ Learned about other projects</li> <li>➤ Analytical method and participatory approach</li> <li>➤ Good discussion, excellent facilitation</li> <li>➤ Knowledge of USAID requirements; strengthened knowledge of how to incorporate a gender perspective into projects</li> <li>➤ The methodology and the workshop made me rethink the topic</li> <li>➤ Work in groups</li> <li>➤ It was enriching and will be useful for including in programs and new proposals</li> <li>➤ Excellent working methodology</li> <li>➤ Dynamic discussions. Useful tools for analysis; emphasis on gender mainstreaming</li> <li>➤ The possibilities of being able to what we can do to improve our projects with a gender perspective</li> </ul>
<p>What I didn't Like</p>	<ul style="list-style-type: none"> <li>➤ Too little time for difficult discussions</li> <li>➤ Too little time for discussions</li> <li>➤ The methodology was not specific, it needs more specific examples</li> <li>➤ Too little time; we weren't able to go into depth in the analysis</li> <li>➤ The room was too hot</li> <li>➤ Too many people left</li> <li>➤ Too little time to dedicate to the different topics</li> </ul>
<p>What I would Change</p>	<ul style="list-style-type: none"> <li>➤ Better ventilation</li> <li>➤ A more dynamic methodology</li> <li>➤ More time (2)</li> <li>➤ Include field staff from the projects</li> <li>➤ More breaks</li> <li>➤ Presentation of indicators and other experiences</li> <li>➤ Put in a few more exercises</li> <li>➤ Assign some background reading (2)</li> <li>➤ Ask participants to prepare their project materials before coming to the training</li> <li>➤ This should be mandatory training for all USAID SOTs, offices, and</li> </ul>



	partners, and for the <u>entire USAID senior management (support offices included)</u>
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A debriefing on August 20 gave senior management an overview of the training and the ADS requirements, as well as some of the preliminary conclusions from speaking to different health and democracy project managers and staff. A shorter version of the training was given to the regional staff of Socios en Salud Project.

## V. **KEY FINDINGS MEETINGS WITH USAID STRATEGIC OBJECTIVE PARTNERS**

The findings are presented for only the projects that the consultant was able to meet with during the course of the visit. The focus was on the Democracy and Health sectors, with some additional consultations with Economic Opportunities Mission SO Team members.

### **SO1 Increased Confidence in Democratic Institutions**

#### **1. Democratic Development and Citizen Participation 3:**

- : Have developed strategies for gender and indigenous inclusion in DDCP activities.
- Both issues are treated as crosscutting and the plans attempt to look at gender and intercultural issues in all aspects of local government, including finances, services, governing, and economic development. The two issues are also treated as crosscutting each other ( i.e. focus on indigenous women, men, young people of various social groups, etc)
- Specific activities focus on:
  - training and workshops with particular target groups
  - leadership
  - strengthening of grassroots organizations
  - empowerment
  - increasing participation and decision-making of traditionally excluded groups and individuals
- Challenges to implementing strategies:
  - Empowerment is not always viewed in positive terms
  - There are issues surrounding the appeal of “integration” versus creating “separate ethnic identities and cultural spaces”
- While there are no formulas for successful gender and intercultural approaches, two municipalities seem to be interesting examples of intercultural approaches, Charazani (norte de La Paz) and Bustillos (norte de Potosí). They might be worth documenting as case studies.
- One of the lessons learned is that it is not sufficient to assist women and indigenous candidates for office, but that in order to be effective once they assume office, they need continuing support.

#### **2. SUNY**

- SUNY focuses principally on the legislative branch of the national government. They have been working with women congressional members (representatives and senators) as well as candidates for direct representation districts (uninominales).

- Recently activities have focused on ways to prepare women as candidates to meet the requirements of the new law that stipulates alternating women and men candidates on the political parties' and groupings' slates, so that men and women each represent 50% of the candidates on the slates and are in comparable positions on the slate (alternancia).
- There is still active debate on how to translate the requirements of the law into gains in congress for women, especially indigenous women. Both CIDOB and the Movimiento Bartolina Sisa are working on negotiating the process within the context of indigenous political groupings who are putting up candidates.

### 3. **NDI/IRI**

- The focus of the activity is currently on the constitutional assembly. They have implemented a number of strategies that are gender-friendly and inclusive of indigenous groups:
  - Radio announcements about the constitutional assembly process in Aymara, Quechua, and Guarani
  - Explicit invitations to women and women's groups to participate in community forums
  - Forums for indigenous youth, including young indigenous women
  - Specific proposals to work with women delegates to the constitutional assembly
  - Invitations to indigenous and women leaders to address community and regional forums.
- NDI and IRI have established a school for training women leaders so they can be more effective candidates for office, as well as serve their constituents more effectively after they are elected. They receive training on:
  - How to get nominated as a candidate
  - How to run a winning campaign
  - Management skills on how to work more effectively within government
- As most indigenous groups have voiced a preference for participating in the constitutional process through political groupings ("agrupaciones") rather than through existing political parties, NDI and IRI have been working with the agrupaciones to include women as well as men in the process. They always include women as speakers in all training events.

### 4. **Partners of the Americas**

- The focus of Partners' work is on the justice system, in particular, public education on changes in the criminal code. They work through:
  - A network of women-and gender-ocused NGOs
  - Educational campaigns
  - Coalition building
  - Participatory strategies
- Partners' also focuses on working with women and indigenous groups to influence judicial policy. Focus areas are:
  - Access the judicial system, including increasing knowledge of rights under Bolivian criminal law
  - Political advocacy and coalition building around issues of violence against women and sexual assault.
  - Alternative justice systems (focus on indigenous communities) for the resolution of certain kinds of disputes.

- Partners conducted a baseline survey of 100,000 people on knowledge of and experience with the criminal justice system. 65% of the participants in the survey resided in urban areas and 50% were women.
  - They are also monitoring access to and treatment by the judicial system for traditionally excluded groups, such as indigenous men and women, and victims of sexual assault and violence against women. In Sucre, Marta Noya of the Juana Arzuduy Women's Organization, has conducted a study on how the judicial system treats victims of crime.

## **SO 2: Increased Income for Bolivia's Poor**

### **1. Bolivian Trade and Business Competitiveness Project**

- Principal sectors are:
  - Textiles (mostly employs women)
  - Leather (mostly employs men)
  - Wood (mostly employs men)
  - Jewelry (employs both)
- Currently conducting a survey focused on productive sectors of the market looks at gender issues with regard to ownership, employment and management.
- The focus of the project has been on financial solvency of businesses with export potential
- To date there has been little focus on gender or indigenous issues, but the project director and other staff who attended the training expressed their interest in looking at both issues more programmatically.

### **2. MAPA**

- Men and women are participating in training on post-harvest treatment of crops
- During the training, the group analyzing gender issues in MAPA project areas, identified migration as a gender-based constraint that has not been taken into consideration in accounting for the percentages of men and women participating in training. Although 40% of the training participants are women, almost half of the men from project areas are absent during a good deal of the year. If only 40% of the training participants are women, the group concluded they are severely underrepresented given the actual sex distribution of the local population.
- The project has generated employment for both women and men.
- The gender action plan developed by the CONCADE project would be a good model for developing a similar plan for MAPA, to ensure that economic benefits, as well as employment opportunities are gender equitable.

## **SO3 Improved Health of Bolivians, Contributing to Their Quality of Life**

### **1. Socios en Salud**

- The project has provided approximately 30 small grants to grassroots and NGO groups. In many cases they provide grants directly to indigenous communities, civil groups, and women's groups. Some examples are:

- To Esperanza Bolivia to work with women's groups in San Lucas, Potosi on rights, income generation, and health
  - To indigenous groups in the Beni to work on malaria control, detection, and treatment in coordination with local health service providers
  - To a collective of women miners in Potosi who live on the Cerro de Potosi as part as their work for a mining cooperative. The grant supports organizational strengthening and mobile health services.
  - In Moco Moco, La Paz, to create a culturally acceptable birthing environment in the local hospital that includes a loren stove to heat the room and a kitchen
  - Grants to five hospitals in El Alto to create culturally acceptable birthing centers.
  - A grant to the Ayoreo community to integrate natural medicine into the health services
  - A grant to the Izoceño Guarani organization CABI to develop a network of helath promoters and to revive the participation of traditional midwives
  - A grant to the Jukumani, Laymi, and Qaqachaka Ayllus to support training of orphaned children and adolescents in natural medicinal practices.
- The project's guidelines for evaluating the feasibility of proposed subgrants assess proposals for attention to gender and intercultural issues. The regional coordinators and consultants hired to assess the proposed subgrants take these issues seriously, but they are on their own to decide what constitutes adequate or inadequate attention to these issues. Currently the project director is working on some more specific criteria to guide the evaluation process. This will make the assessment process more rigorous and more consistent. They will also serve as indicators for ex-post evaluation.

## 2. **PROSIN**

- PROSIN has adopted the *Repro Salud* methodology developed by the Peruvian NGO *Movimiento Manuela Ramos* which works through women's groups on improving advocacy, empowerment, and coalition-building to engage and pressure health services to improve quality of care from the users' perspective.
- The methodology had a very positive impact on improving utilization and satisfaction with health services in Peru where it has been evaluated. In Peru, the methodology was developed and adapted in conjunction with an extensive research component to analyze variations in beliefs and practices across the county. The research served to adapt the approach to local circumstances.
- In Bolivia, it appears that the methodology has been applied more mechanically without undertaking the necessary research and adaptation, except for some changes in drawings and language in the materials. Now that PROSIN staff are familiar with the basic methodology and have had some experience applying it, it is recommended that they do some qualitative evaluation and research on how to better adapt to the varied cultural and social contexts in Bolivia.
- PROSIN's work on intercultural issues consists of extending services out to some of Bolivia's most excluded and isolated populations, and a focus on quality of care from the service users' perspectives. It is unclear, aside from the *Repro Salud* methodology, how this is being done operationally.

## 3. **PROCOSI**

- PROCOSI's gender mainstreaming program was based largely on an adaptation of the IPPF manual *Quality of Care from a Gender Perspective*. Approximately 70% of the PROCOSI members (17 out of 24 members when the project started) participated in the gender mainstreaming program. The intervention had the objectives of: 1) making clients more aware of their rights; 2) changing providers' attitudes and their knowledge and respect for clients' rights; 3) making services more gender equitable and respectful of cultural differences; and 4) making services friendlier to men and more capable of addressing their needs.
- The results obtained by the project are that all 17 organizations that participated have: 1) trained teams to integrate quality of care from a gender perspective; 2) gender action plans; and 3) monitoring and evaluation systems with indicators to measure the impact of incorporating quality of care from a gender perspective. The project coordinator has developed a tool to assess annual performance and the capacity of the participating organizations to sustain their achievements. She has proposed issuing certificates to those that maintain or improve upon the results of the project. The main drawback of the project was mostly that the objectives were overly ambitious for the amount of money that was allocated to each organization. Therefore, many NGOs found the process very time and labor intensive.
- In the Chagas project PROCOSI stipulated that 30% of the leadership positions had to be held by women.
- Intercultural interventions are contemplated by most PROCOSI organizations but only three, CSRA, PCI, and APROSAR, have made significant progress in conducting the necessary background research and in operationalizing their findings. They have found that it is a lengthy and difficult process. Both the NGOs and the communities they involved found the attempts to be very worthwhile, but incomplete.

## **APPENDIX 1: ILLUSTRATIVE LIST OF RECENT BOLIVIAN RESOURCES ON GENDER AND INDIGENOUS ISSUES BY SECTOR**

### **MULTISECTORAL**

Arnold, Denise Y. (ed.), 1997, *Más allá del silencio: las fronteras de género en los Andes*, Biblioteca de Estudios Andinos No. 1. Parentesco y género en los Andes, tomo I. La Paz: CIASE e ILCA.

Criales, Lucia, 1995, *Construyendo la Vida: Pautas de crianza en la cultura aymara urbana*. La Paz: Centro de la promoción de la mujer Gregoria Apaza

Jiménez, Maritza, 1996, *Podemos ser...desde nosotras mismas!!! (Trabajo sobre género con mujeres de zonas urbano-populares)*. La Paz: Fundación La Paz.

Lehm, Zulema (ed.), 2002, *Matrimonios Interétnicos: Reproducción de los grupos étnicos y relaciones de género en los Llanos de Mojos*. La Paz: PIEB

Paulson, Susan and Mónica Crespo (eds.), 1997, *Teorías y Prácticas de Género: una conversación dialéctica*. La Paz: Embajada Real de los Países Bajos.

Rivera, Silvia, 1996, *Ser Mujer Indígena, Chola, o Birlocha en la Bolivia Postcolonial de los Años 90*. La Paz: Ministerio de Desarrollo Sostenible

### **2. Gender and/or Cultural Analysis Guidelines and Training Manuals**

AusAID, 1998, *Guide to Gender and Development*. Canberra: AusAID  
<http://www.ausaid.gov.au/publications/pdf/guidetogenderanddevelopment.pdf>

Emery, Alan R., 2000, *Integrating Indigenous Knowledge in Project Planning and Implementation*. **International Labour Organization, The World Bank, Canadian International Development Agency, and KIVU Nature Inc.**  
[http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/ea/\\$file/IndiKnow-e.pdf](http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/ea/$file/IndiKnow-e.pdf).

UNDP, 2004, *Gender Mainstreaming Learning Manual & Information Pack*. **New York: UNDP**  
<http://www.undp.org/gender/infopack.htm>

UNDP, 2004, *Transforming the Mainstream: Gender in UNDP*. New York: UNDP  
<http://www.undp.org/gender/docs/publication-transforming-the-mainstream.pdf>

### **HEALTH**

#### **1. Books**

Arnold, Denise Y. and Juan de Dios Yapita, with Margarita Tito, 1999, *Vocabulario aymara del parto y de la vida reproductiva de la mujer*. **La Paz: FHI e ILCA**

Arnold, Denise Y. colab. Juan de Dios Yapita and others, 2002, *Las wawas del Inka: hacia la salud materna intercultural en algunas comunidades andinas*. **Serie: Informes de Investigación II N° 2, La Paz: ILCA.**

Bradby, Barbara and Jo MURPHY-LAWLESS, Editores: Denise Y. Arnold y Juan de Dios Yapita. *Reducing maternal mortality and morbidity in Bolivia: Appropriate birth practices in the formal and informal sectors of perinatal care.*

Dibbets, Ineke and Mariska de Boer. 2002, *Encuentros con la propia historia: Interculturalidad y Trato Humano desde las perspectivas de un equipo de salud*. La Paz: TAHIPAMU

Dibbets, Ineke, 1994, *Lo Que Puede el Sentimiento: La temática de la salud a partir de un trabajo con mujeres en El Alto Sur*. La Paz: TAHIPAMU

Rance, Susana and Silvia Salinas Mulder, 2001, *Investigando con ética: Aportes para la reflexión-acción*. La Paz: CIEPP and Population Council

Salinas, Silvia, 2000, *Identidad, Poder, y Sexualidad en Adolescentes de zonas peri-urbanas de La Paz y El Alto*. La Paz: UNDP and Educación en Población.

## **2. Gender and/or Cultural Analysis Guidelines and Training Manuals**

Caro, Deborah with Jane Schueller, Maryce Ramsey, and Wendy Voet, 2003, [\*\*A Manual for Integrating Gender into Reproductive Health and HIV Programs: From Commitment to Action\*\*](#). Washington D.C.: USAID/IGWG.

Davison, Peter, Roger Davis, and Andrew Safer, 1997, *Healthy Relationships Violence Prevention Curriculum* (Halifax, Nova Scotia: Men for Change). Accessed online at [www.m4c.ns.ca/](http://www.m4c.ns.ca/)

Eckman, Anne, Blakely Huntley, and Anita Bhuyan, 2004, *Guide for Integrating Gender into HIV/AIDS Programs: [How to Integrate Gender into HIV/AIDS Programs: Using Lessons Learned from USAID and Partner Organizations](#)*. Washington D.C.:USAID/IGWG

Gender and Health Group, January 1999, *Guidelines for the Analysis of Gender and Health*. Liverpool: Department for International Development [DFID] and the Liverpool School of Tropical Medicine.). Accessed online at [www.liv.ac.uk/lstm/](http://www.liv.ac.uk/lstm/).

Guedes, Alessandra, 2004, *Addressing Gender-based Violence from the Reproductive Health/HIV Sector: A Literature Review and Analysis*. Washington D.C.: LTG Associates.

Ipas and HD Networks, 2001, *Gender or Sex: Who Cares? Skills-Building Resource Pack on Gender and Reproductive Health for Adolescents and Youth Workers*. Chapel Hill, NC: Ipas Accessed online at [www.ipas.org](http://www.ipas.org).

Inter-Agency Gender Working Group (IGWG), 2004, [Reaching Men to Improve Reproductive Health for All: An Implementation Guide](#). Washington D.C.:USAID/IGWG

International Planned Parenthood Federation/Western Hemisphere Region, January 2000, *Manual to Evaluate Quality of Care from a Gender Perspective*. New York: IPPF/WHR,. Accessed online at [www.ippfwhr.org](http://www.ippfwhr.org).

Nath, Madhu Bala, 2000, *Gender, HIV and Human Rights: A Training Manual*. New York: UNIFEM

Paulson, Susan, Maria Elena Gisbert, and Mery Quitón, 1999, *Guide for Rethinking Differences and Rights in Sexual and Reproductive Health: A Training Manual for Health Care Providers*. Research Triangle Park, NC: Women Studies Project of Family Health International. Accessible in English and Spanish online at: <http://www.fhi.org/en/RH/Training/trainmat/rethinkDiff/index.htm>

Swedish International Development Cooperation Agency, 1997, *Handbook for Mainstreaming: A Gender Perspective in the Health Sector*. Stockholm: SIDA. Accessed online at [www.sida.se](http://www.sida.se)

Welbourn, Alice, 1995, *Stepping Stones: A Training Package on HIV/AIDS, Communication and Relationship Skills*. London, UK: ACTIONAID. Available from TALC Publications, [www.talcuk.org/stratshope/order.html](http://www.talcuk.org/stratshope/order.html).

World Health Organization, 2000, *Transforming Healthy Systems: Gender and Rights in Reproductive Health* (A Training Manual for Health Managers). Geneva: WHO. Accessed online at <http://who.int/reproductive-health/>

### **EGAT AND ENVIRONMENT (many of these sources deal with both)**

Alanes Bravo, Z., July 1999, *Bolivia: pobreza y trabajo femenino en tiempos de globalización, y Formación de recursos humanos femeninos: un desafío de la equidad y del desarrollo sostenible*, NY: UNCTAD(U/EW/TSDG/28).

Balza Alarcón, 2001, *Tierra, Territorio, y Territorialidad Indígena: Un estudio Antropológico sobre la evolución en las formas de ocupación del espacio del pueblo indígena chiquitano de la ex-reducción jesuita de San José*. Santa Cruz de la Sierra: APCOB/SNV/IWIGIA

Bernabé, Adalid, Efraín Felip[e], Gisha Valencia, Freddy Martinez, and Roberto Arrázola, 2003, *Las Ferias Campesinas: Una estrategia socioeconómica*. La Paz: PIEB.

Contreras, Dante and Daniela Zapata, 2004, "Child labor in Bolivia: schooling, gender and ethnic groups," Paper presented at Econometric Society 2004 Latin American Meetings, April 2004.



Harris, Olivia, 2001, *To Make the Earth Bear Fruit: Ethnographic Essays on Fertility, Work and Gender in Highland Bolivia*; London: Ilas Series

Herrera, Enrique, Cleverth Cardenas, and Elva Terceros, 2003, *Identidades y Territorios Indígenas: Estrategias indentitarias de los tacana y ayoreo frente a la ley INRA*. La Paz: PIEB.

Montero, Lourdes and Pablo Poveda, 2003, *Ser Castañera: Cadena productiva y condiciones laborales de la industria de la castaña en Riberalta*. La Paz: CEDLA.

Pacheco Balanza, Pablo and Enrique Ormachea Saavedra, 2000, *Campesinos, Patrones Y Obreros Agrícolas: Una aproximación a las tendencias del empleo y los ingresos rurales en Bolivia*. La Paz: CEDLA.

Schulte, Michael, 1999, *Llamereros y Caseros*. La Paz: PIEB.

Rossell, Pablo and Bruno Rojas, 2001, *Competitividad, Acumulación y Empleo: Estudio de caso en el ramo de las Confecciones*. La Paz: CEDLA.

Tapia, Mario, and Ana De la Torre, 1997, *La mujer campesina y las semillas andinas: Genero y el manejo de los recursos genéticos*. Rome: FAO and Instituto Internacional para los Recursos Fitogenéticos. <http://www.fao.org/DOCREP/x0227s/x0227s00.htm>

Yampara Huarachi, Simón, 2001, *El Ayllu y la Territorialidad en los Andes: Una aproximación a Chamba Grande*. El Alto: Universidad Pública de El Alto.

## **2. Gender and/or Cultural Analysis Guidelines and Training Manuals**

de Villota, Paloma, 2000, *Economía y Género: Macroeconomía, política fiscal y liberalización. Análisis de su impacto sobre las mujeres*

**March 2000, Gender Guidelines: Water Supply and Sanitation Supplement to The Guide To Gender and Development. Canberra: AusAID**  
[http://www.ausaid.gov.au/publications/pdf/gender\\_guidelines\\_water.pdf](http://www.ausaid.gov.au/publications/pdf/gender_guidelines_water.pdf)

CIDA, 2003, Gender Equality Division has released a new publication—*Gender Equality and Trade-Related Capacity Building: A Resource Tool for Practitioners*. Quebec: Canadian International Development Agency.  
[http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/Policy/\\$file/Trade-Related%20Capacity%20Building.pdf](http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/Policy/$file/Trade-Related%20Capacity%20Building.pdf)

FAO, 1995, *Modules on gender, population & rural development with a focus on land tenure & farming system*. Rome: UNDP. <http://www.fao.org/DOCREP/x0252e/x0252e00.htm>

FAO, 2001, SEAGA: *Socio-economic and Gender Analysis Programme*. Rome: FAO.  
[http://www.fao.org/sd/seaga/4\\_en.htm](http://www.fao.org/sd/seaga/4_en.htm)

FAO, 1999, [Análisis de Género y Desarrollo Forestal](#). *Manual de capacitación y aplicación*. Guatemala. Rome: FAO

FAO, 1995, [Gender analysis and forestry international training package \(GAFTP\)](#); based on the experiences in Asia (Bangladesh, Bhutan, India, Nepal, Sri Lanka and Thailand). Rome: FAO

**Paulson, S., 1995**, [Desigualdad social y degradación ambiental en América Latina. Recurso para la reflexión y enseñanza con análisis de género y forestería comunal](#), FAO, Rome (Italy). Dept. de Montes, JobNum: x0221s

### Democracy and Governance

Albó, Xavier, 2002, *Pueblos Indios en la Política*. La Paz: CIPCA

Amonzabel Menese, Claudia G. and Rosario Paz Ballivián, 2003, *Las Mujeres Rumbo a la Asamblea Constituyente*. La Paz: FUNDAPPAC and Honrad Adenauer-Stiffung.

Asociación de Concejalas de Bolivia, 2003, *Estrategia de Capacitación a Concejalas*. La Paz: UNDP

Blanes, José, 2000, *Mallkus y Alcaldes*. La Paz: PIEB and Cebem

Fernandez, Marcelo, 2004, *La ley del Ayllu*. La Paz: PIEB, segunda edición

Instituto de la Judicatura de Bolivia (ed.), 2003, *Justicia Comunitaria en los Pueblos Originarios de Bolivia*. Sucre: Instituto de la Judicatura de Bolivia

Mejia, Lucila, Irma Garcia, Marcela Valdivia, Celinda Sosa, Lidia Anti, Forentina Alegre, Jacinta Mamani, and Bernadina Laura, 1984, *Las Hijas de Bartonlina Sisa*. La Paz: Hisbol

ILDIS (ed.), 2003, *Revoluciones del Siglo XX: homenaje a los cincuenta años de la Revolución Boliviana*. La Paz: PNUD/ FES-ILDIS/ASDI/PLURAL

Rivera, Silvia Cusicanqui and Raul Barrios Moron, 2000, *Violencias Encubiertas en Bolivia: Cultura y Política*. La Paz: CIPCA-Aruwiyiri

Salmón, Josefa and Guillermo Delgado, 2003, *Identidad, Ciudadanía, y Participación Popular desde la Colonia al Siglo XX*. La Paz: Plural

Temple, Dominique, Jacqueline Michaux, Martha Gonzales, and Edmundo Blanco, 2003, *Las Estructuras Elementales de la Reciprocidad*. La Paz: Plural

Ticona, Estaban, Gonzalo Rojas, and Xavier Albó, 1995, *Votos y Whiplas: Campesinos y Pueblos Originarios en Democracia*. La Paz: CIPCA

Ticona, Estaban and Xavier Albó, 1997, *La Lucha por el Poder Comunal*. La Paz: CEDOIN

UNDP, 2004, Gender Approaches in Conflict and Post-Conflict Situations.  
<http://www.undp.org/gender/docs/gendermanualfinalBCPR.pdf>

CDs and Websites:

2004 *Dossier Estadístico de Empleo, Condiciones Laborales, y Dimensiones de Género*. La Paz: CEDLA

2004. *10 Años 1995-2004- Informe de Desarrollo Humano en Bolivia*. La Paz: UNDP

INE Gender Indicators [http://www.ine.gov.bo/cgi-bin/PIndicadores\\_Generoxx.exe](http://www.ine.gov.bo/cgi-bin/PIndicadores_Generoxx.exe)

## APPENDIX 2: TRAINING MATERIALS AND PRESENTATIONS (In Spanish)

### 1. AGENDA

#### **USAID/Bolivia Taller Sobre La Incorporación De Una Perspectiva De Género Y Asuntos Socioculturales Para Lograr Una Mayor Inclusión Social En Los Proyectos**

La Paz, Bolivia Agosto 17, 2004

#### **Agenda**

- 8:30 Bienvenida
- 8:45 Objetivos, normas, y metodología del Taller
- 9:00 Votar con los pies
- 9:45 Presentación de las esferas de actividad: Un marco para el análisis de género y asuntos socioculturales y un caso de estudio
- 10:45 Te/Café
- 11:00 Ejercicio en grupos pequeños: Aplicación del marco para el análisis de género y asuntos socioculturales a los proyectos de los participantes
- 11:45 Presentaciones de los grupos pequeños
- 12:30 Ejercicio en grupos pequeños: Identificación de barreras y facilitadores de género y asuntos socioculturales
- 13:00 Almuerzo
- 14:00 Presentación sobre los requisitos de USAID para incorporar una perspectiva de género en las estrategias y proyectos
- 14:30 Incorporación de una perspectiva de género y asuntos socioculturales en el ciclo de planificación de los proyectos: presentación y aplicación a un proyecto en plenaria
- 15:30 Te/Café
- 15:45 Aplicación de lineamientos sectoriales para la incorporación de una perspectiva de género y asuntos socioculturales en el ciclo de planificación de los proyectos de los participantes
- 16:45 Presentación de los resultados del trabajo del grupo
- 17:30 Identificación de los pasos siguientes, compromisos, y pedidos para asistencia técnica
- 17:45 Clausura y evaluación

## 2. **OBJETIVOS DEL TALLER**

**Objetivo General:** Lograr que todos l@s participantes incorporen la perspectiva de equidad de género y asuntos socioculturales, para una mejor inclusión en las actividades de USAID.

### **Objetivos específicos:**

1. Conocer y aplicar un marco para análisis de género y asuntos socioculturales.
2. Identificar las limitantes y oportunidades en asuntos de género y socioculturales.
3. Conocer los requisitos de USAID para incorporar una perspectiva de género en la elaboración de sus programas y actividades.
4. Conocer y aplicar un proceso de integración de un enfoque de género al ciclo de programas.

## **LA METODOLOGIA DEL TALLER**

Participativa con exposiciones cortas y trabajo en grupos, los cuales serán conformados de acuerdo a su propio trabajo y los sectores en que se desempeñan.

## **NORMAS**

- ◆ Apagar celulares
- ◆ No fumar dentro de la sala
- ◆ Respetar horarios
- ◆ Escuchar con respeto a los demás personas
- ◆ Dar oportunidad a todos para que den sus opiniones

## 3. **CASO DE ESTUDIO**

**Género, Conservación Y Participación Comunitaria: El caso del Parque Nacional Jaú<sup>2</sup>**

**Antecedentes:** El PNJ está ubicado en el estado de Amazonas, en los municipios de Novo Airão y Barcelos. Con una extensión de 2.272.000 ha., es el Parque Nacional más grande de Brasil, y el más grande del mundo ubicado en la selva tropical. A pesar que la actual legislación no permite la presencia de habitantes, siguen viviendo grupos en el parque diecisiete años después de la creación del PNJ. Reconociendo la realidad, el gobierno aprobó un convenio de co-gestión entre

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<sup>2</sup> El caso es una adaptación de la publicación: Regina Oliveira & Suely Anderson 1999. "Género, Conservación Y Participación Comunitaria: El caso del Parque Nacional Jaú," Caso Numero 2 de MERGE: Gainesville: University of Florida.

la ONG FVA y los pobladores para negociar y proponer soluciones más adecuadas al manejo del Parque.

**Grupos de Interés:** Los grupos con un interés indirecto son los gobiernos locales, los políticos, los turistas que van a pescar, los comerciantes de peces tropicales y los madereros. Con un interés todavía más indirecto encontramos la legislación brasilera y la sociedad brasileña, quienes también están interesados en el control y manejo de la Amazonía.

**Fuente de Información:** A base de una encuesta FVA recogía información sobre la población. Las preguntas, aunque eran oídas por todos, en general eran contestadas por el jefe de la familia, principalmente hombres, con poca o ninguna participación de las mujeres. Para contestar las preguntas del censo (nombre y número de hijos, documentación y escolaridad) los hombres consultaban a las mujeres. De la misma manera, los hombres llamaban a sus esposas para contestar las preguntas sobre fertilidad y mortalidad, actividades de ocio, migración y consumo.

Los hombres insistían en responder las preguntas sobre consumo de recursos naturales, relacionadas a la caza, y recolección de tortugas y sus huevos. Mediante conversaciones separadas sobre cocina y la preparación de platos consumidos por la familia las mujeres daban información en relación al consumo de productos provenientes de la caza que fue más completa que la de los hombres, que por miedo a las represalias (pensaban que eran del IBAMA) omitían muchos datos. En las casas en las que una mujer (principalmente viudas o mujeres sin compañeros) era la jefe del hogar, ésta también contestaba las preguntas sobre comercialización de productos.

**Información Demográfica:** Actualmente hay 984 habitantes en el Parque (divididos en 159 unidades domésticas), de los cuales el 54% son hombres y el 46% mujeres de todas las edades. La población está distribuida de forma desigual en el PNJ, la mayoría vive en la periferia (59%). La población del PNJ se distribuye de forma más o menos linear en los márgenes de los principales ríos, viviendo encima de los barrancos de tierra firme, lo que les permite usar los ríos y las corrientes para la pesca y para transportarse, y la tierra firme para actividades agrícolas y extractivistas.

Casi todos los residentes son originarios del estado de Amazonas (97%) y muchos nacieron en el área del PNJ. La población es predominantemente joven, con un promedio de 18 años de edad. Si consideramos 15 años de edad como indicador de juventud, el 55% de la población tiene esa edad o son menores. Si consideramos 20 años como indicador de juventud el 64% de la población es joven (Figura 3). Hay un 50% más de hombres que de mujeres entre la población entre 15 y 20 años de edad, lo que sugiere que existe un proceso de emigración de mujeres jóvenes. Las mujeres empiezan a tener y hijos y formar una familia a los 16 años, y estas familias a veces se instalan y viven en el lugar de nacimiento de las mujeres.

La tasa promedio de fertilidad entre las mujeres, número de hijos nacidos vivos más número de hijos nacidos muertos, es de siete hijos por mujer entre los habitantes del Parque. Esto es más del doble de la tasa promedio de fertilidad del conjunto de mujeres brasileñas, de menos de tres hijos por mujer (Rebelo, 1995). Sin embargo, la expectativa de vida es muy limitada debido a los continuos riesgos a los que están expuestos los habitantes y a las precarias condiciones de salud

en el Parque. En general son las mujeres que mantienen un pequeño jardín de plantas medicinales que usan cuando es necesario. Las personas que cuidan la salud de los habitantes como los rezadores (hombres y mujeres), los curanderos (sólo hombres) y las parteras (sólo mujeres) se pudieron conocer algunas formas de uso de estas plantas.

El 74% de la población del parque, incluyendo adultos y niños en edad escolar, es analfabeta. De la población de alfabetizados el 61% son hombres.

### **Actividades Productivas:**

**Pesca:** En general, los hombres pescan por la mañana, y usan sedales y flechas, técnicas comunes durante los períodos de escasez (cuando el río está crecido), como anzuelos, utilizan grillos y saltamontes que son cazados en los alrededores de la casa por los niños y almacenados vivos. Cuando los hombres están en el bosque dedicados a las actividades extractivas, los hijos mayores y las mujeres son los responsables de la pesca, y utilizan preferentemente un palo (*caniço*), con el mismo tipo de anzuelo. Las mujeres salen a pescar con sus hijos menores, incluso bebés, cuando no tienen otros hijos lo suficientemente mayores como para cuidar a los hermanos menores.

Durante las crecidas (de mayo a agosto) salen por la noche usando una linterna para aturdir al animal y un arpón para capturarlo, una actividad que puede durar hasta ocho horas, según la cantidad de peces deseada y es más practicada por los hombres, aunque en algunas familias las mujeres también la ejercen. Preparar el pescado (limpiar el pescado y salarlo) es un trabajo casi exclusivamente a cargo de mujeres y las niñas a partir de los ocho años de edad. La captura de tortugas es una actividad exclusivamente masculina, aunque mujeres y niños recogen los huevos, principalmente en la estación seca (de agosto a septiembre). Limpiar y asar o hervir la carne de tortuga es un trabajo masculino, aunque algunos platos son preparados por las mujeres. La construcción de corrales, pequeñas áreas donde se guardan las tortugas, es también una actividad exclusiva de los hombres.

**Caza:** La caza es más intensa durante la estación de las lluvias, cuando hay más tierras sumergidas, y por tanto los peces están menos concentrados y la pesca es más difícil. Esta es una actividad masculina, aunque en algunas familias las mujeres también la ejercen. El trabajo de tratar y preparar las piezas de caza es tarea tanto de hombres como de mujeres.

**Agricultura:** Los hombres, con la ayuda de los hijos mayores, limpian el terreno, lo que consiste primero en cortar los árboles pequeños y el sotobosque, y luego talar los árboles grandes con un machete, conservando sólo los árboles de castaña, los cuales son protegidos por la ley federal. Los hombres, ayudados por los hijos de ocho años en adelante, también son los encargados de apilar los árboles y quemarlos. Tanto hombres como mujeres participan en la preparación del terreno, la siembra y la cosecha. Las mujeres siembran diferentes variedades de yuca, además de otros alimentos como camote, *cará*, y *ariá*. Los hombres también siembran yuca a demás de productos comerciales como bananas. En general, el cuidado de las parcelas agrícolas está a cargo de las mujeres y los niños. El cuidado de las parcelas incluye sacar las malas hierbas, para lo que se utiliza un cuchillo, y se realiza cuatro veces al año. En la cosecha de la yuca participan

hombres, mujeres e hijos mayores. Los hijos menores también son llevados al campo cuando no se tiene con quien dejarlos.

Toda la familia participa en la preparación de harina de yuca. Una parte de la cosecha de yuca se deja remojar, y mujeres, ancianos y niños pelan el resto. En el cobertizo donde se prepara la harina, la yuca es rallada y prensada por hombres, mujeres y niños. La prensa es un trabajo masculino, porque colocar la masa y prensar hasta sacar toda el agua requiere mucha fuerza física. Una vez prensada, los niños y las mujeres llevan la masa al horno para ser tostada. Hombres y mujeres ponen leña en el horno y mezclan y remueven constantemente la harina en el horno. La preparación de subproductos derivados de la harina, como la tapioca, el *tucupi* (salsa preparada a partir del líquido extraído de la yuca amarga y usada como aderezo), y el *beiju* (una especie de torta seca) está a cargo de mujeres y adolescentes entre los 8 y los 16 años.

### **Comercialización de los recursos naturales:**

**Lianas:** Son un producto de invierno. En general los hombres van a sus “centros” (campamentos en el bosque), donde permanecen una semana o más. Durante ese tiempo procuran dejar comida con la familia, generalmente piezas de caza. En los centros realizan la extracción solos, o acompañados por algún vecino cercano. Durante el tiempo en que están en los campos, ellos procesan las lianas, con el permiso de los vecinos más cercanos a su campamento. Esta actividad se practica principalmente cuando hay que pagar deudas al patrón y se necesitan grandes cantidades de producto.

Cuando se recogen lianas cerca de la casa, las mujeres y los niños están a cargo de pelarlas y procesarlas, después de que los hombres las traen. Las lianas se pelan con las manos o con la ayuda de cuchillos y las cortan a un tamaño de 40-50cm. Mujeres, hombres, e hijos mayores se encargan de deshilar las lianas en la noche. Los *paneiros* (canastas grandes que se usan para transportar yuca o castañas) son confeccionados de lianas por los hombres, y las escobas y cestos por las mujeres, aunque algunos hombres también hacen utensilios domésticos. Los hombres (los jefes del hogar) comercialización de lianas como materia prima. Las mujeres venden los productos que ellas elaboran directamente a los comerciantes locales.

**Castaña de Brasil:** Este es también un producto de invierno. Toda la familia participa en la recolección de la castaña, a veces teniéndose que desplazar a otras zonas del Parque donde se da la castaña, y construir allí pequeños resguardos. Los hombres entran en el bosque y recogen las castañas que cargan en los *paneiros*. Las mujeres y los hijos mayores se encargan de partir las castañas, para lo que usan un cuchillo largo. Una vez retiradas las castañas de la corteza, no necesitan ningún otro procesamiento y son embolsadas y vendidas por los hombres.

## **4. UN MARCO PARA EL ANÁLISIS DE GÉNERO EN LA PLANIFICACIÓN ESTRATÉGICA**

El Sistema Automatizado de Directivas (ADS) se requiere a todas las unidades operativas de USAID, que están involucradas en un proceso de planificación estratégica, a analizar dos preguntas importantes con relación a los asuntos de género



- (1) ¿Cómo afectarán las relaciones de género al logro de resultados sostenibles? y
- (2) ¿Cómo afectarán los resultados propuestos al status relativo de las mujeres con respecto a los hombres?

El ADS explica que para responder adecuadamente estas dos preguntas los equipos de los objetivos estratégicos (SOTs), quienes deberían tomar en cuenta los *diferentes roles, relaciones y el balance de poder entre mujeres y hombres y el entorno institucional*<sup>3</sup>. Cuando es posible, todo lo concerniente a género debería ser tratado como una parte integral de ese amplio margen de análisis técnico dirigido a la preparación de un plan estratégico en vez de un asunto separado. Específicamente este marco de trabajo facilita el análisis de cómo las relaciones de género se llevan a cabo en diferentes esferas de la vida social y actividades de desarrollo. También ayuda a identificar si hay limitantes específicas estructurales e institucionales basadas en género que afecten el status relativo y apertura de oportunidades a hombres y mujeres que pueden ser dirigidos por actividades de desarrollo. En este marco de trabajo, las relaciones de género son analizadas a través de seis esferas para identificar si existe limitantes y oportunidades basadas en género. Estas seis esferas no abarcan el total de actividades del rango humano y hay una sobreposición entre ellas, no obstante proporcionan un marco de trabajo conceptual dirigida a las dos preguntas propuestas por el ADS.

Este marco de trabajo ayudara a las unidades operativas de US AID y sus socios a moverse más allá de un proceso desagregado de indicadores por sexo. Servirá para capacitar a su personal para analizar el impacto potencial de las estrategias y programas de desarrollo al status relativo de hombres y mujeres y así asegurarán que los programas de USAID sean más sostenibles y exitosos

Las seis esferas que estructuran el análisis de género e identifican las limitantes basado en género en este marco de trabajo son:

### **1. Acceso a los recursos y bienes**

El acceso se refiere a la capacidad a acceder y usar los recursos que sean necesarios para ser una persona activa y productiva (en términos sociales, económicos y políticos) y para ser participe en su sociedad. Esto incluye acceso a los recursos, ingresos, servicios, empleo, información beneficios y bienes

### **2. Conocimientos, creencias y percepciones**

Esta esfera se refiere a las ideologías culturales de género que da forma a las creencias acerca de cualidades y metas propuestas o aspiraciones apropiadas a diferentes categorías de género. Involucra entendimientos de cómo las personas interpretan aspectos de su vida en forma diferente, de acuerdo a las categorías de género y de cultura. Los hombres y las mujeres pueden tener acceso a diferentes tipos de conocimientos, tener diversas creencias, percibir situaciones en forma diferente y conformar normas específicas de género. En muchas culturas, algunos conocimientos, pueden ser solo para una categoría de género y oculta para la

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<sup>3</sup> Sistema Automatizado de Directivas (ADS) capítulo 201.3.8.4. Análisis de Género

otra, limitando las destrezas de las personas para participar en todo el rango de las experiencias sociales.

### **3. Las prácticas y la participación**

Esta esfera se refiere al comportamiento y acciones de las personas – lo que hacen realmente – y como esto varía por género. Abarca no solo modelos actuales de acción, también la forma en que las personas se comprometen en actividades de desarrollo. Incluyendo asistencia a reuniones, cursos de capacitación, aceptando o buscando servicios, y otras actividades de desarrollo. La participación puede ser en ambas formas activa y pasiva. Los participantes pasivos pueden estar presentes en el lugar donde se está llevando a cabo una reunión y por consiguiente estar recibiendo la información transmitida, pero si no dar ninguna opinión en forma verbal ni desempeñando un rol de liderazgo. Mientras que los participantes activos están involucrados dando opiniones en forma verbal y jugando un rol activo o de liderazgo en los procesos grupales.

### **4. El tiempo y el espacio**

El género frecuentemente estructura ambos, la disponibilidad y asignación del tiempo también como el espacio en el cual se utiliza el tiempo. Esta esfera incluye el reconocimiento de las diferencias de género en la división de ambas labores productivas y reproductivas, identificando como el tiempo es utilizado y comprometido durante el día, la semana, el mes el año y en las diferentes estaciones; determinando como las personas contribuyen al mantenimiento de la familia, la comunidad, y la sociedad. El objetivo es determinar como las personas en las diferentes categorías de género utilizan su tiempo y que implicaciones tiene esto para su respectiva disponibilidad a las actividades programadas. Una pregunta importante que hay que hacer es si la disponibilidad de tiempo es flexible, negociable y fungible.

### **5. Los derechos legales y el estatus (el marco institucional –contexto nacional y socio cultural)**

El análisis de esta esfera implica calcular como las personas en diferentes categorías de género están considerados y tratados por ambos, los códigos legales de costumbre y los formales, como los sistemas judiciales y políticos. Abarca el acceso a la documentación legal como carnets de identidad, registro para votar, y títulos de propiedad, así como derechos a herencia, trabajo, reparación de errores, y representación. Y también de ejercitar la vida sexual y reproductiva

### **6. Poder**

Esta esfera de la vida social está relacionada a la habilidad de las personas para decidir, influenciar, controlar, y hacer cumplir. Se refiere a la capacidad de tomar decisiones y ejercitar libremente la toma de decisiones sobre sí mismo, en su familia, en comunidad, en su municipio y en la sociedad en general. Esto incluye la capacidad de los adultos a decidir acerca del uso de los recursos e ingresos individuales y del hogar y su opción de empleo. También abarca el derecho a comprometerse en acciones colectivas, incluyendo la determinación de derechos y control de la comunidad y los recursos del municipio. Finalmente incluye la capacidad de ejercer su voto, su carrera profesional, ser un líder activo, e ingresar en los contratos legales.

Una vez recogida la información sobre cómo las relaciones de género se expresan dentro de estas seis esferas el paso siguiente en un proceso de planificación estratégica es identificar las limitantes y oportunidades basadas en género que podría influir al logro de resultados sostenibles. Las limitantes basadas en relaciones de género son los factores de acuerdo a la identidad de género que restringen el acceso de las mujeres o los hombres a los recursos, a su comportamiento, la participación, el uso de tiempo, la movilidad, los derechos y el ejercicio de poder.

Las oportunidades basadas en relaciones de género son los factores estructurales e institucionales que facilitan a las mujeres y los hombres a tener acceso equitativo a los recursos, a comportarse y participar en actividades sin restricciones, a decidir por sí misma(o), como usar su tiempo, movilizarse donde y cuando quieran.

### **Ejemplos de preguntas claves**

(1) ¿Cómo afectarán las relaciones de género al logro de resultados sostenibles?

#### **• Acceso:**

**Limitante:** ¿Un acceso desigual a recursos y servicios del proyecto afectará el alcance de sus metas?

**Oportunidad o factor facilitante:** ¿Existen instancias de acceso justo con respecto a ciertos tipos de recursos que podrían proveer un modelo de acceso a otros recursos?

#### **•Conocimientos, creencias y percepciones:**

**Limitante:** ¿Existen creencias de género específicas que impidan lograr los resultados del proyecto?

**Oportunidad o factor facilitante:** ¿Existe un conocimiento específico de género que facilitará tomar decisiones que serán esenciales para lograr las metas del proyecto?

#### **•Las prácticas y la participación:**

**Limitante:** ¿Existen personas que son excluidas por su género (incluso en forma inadvertida) en forma pasiva o activa en las actividades de un proyecto?

**Oportunidad o factor facilitante:** ¿Existen tipos de roles de liderazgo específico por género que proveen las bases para una participación más amplia?

#### **•El tiempo y el espacio:**

**Limitante:** ¿Existen roles específicos de género que evitan la participación de algunas personas en las actividades, porque trabajan en un determinado lugar?

**Oportunidad o factor facilitante:** ¿La división de trabajo por género, provee un marco de trabajo útil para la distribución equitativa de los recursos del proyecto y que favorecerá los objetivos del proyecto?

#### **•El marco legal, los derechos y el estatus:**

**Limitante:** ¿Inhiben el derecho a la propiedad las leyes discriminatorias de género?

**Oportunidad o factor facilitante:** ¿una estructura legal que es neutra en términos de género dará la oportunidad para asegurar en el diseño de la reglamentación un trato equitativo frente al sistema judicial y el mercado laboral?

•**Poder:**

**Limitante:** ¿Sufrirán consecuencias adversas por decisiones hechas por otras personas que son excluidas de la toma de decisiones por su identidad étnica o de género?

**Oportunidad o factor facilitante:** ¿Es posible organizar a individuos, que están excluidos de tomar decisiones por su género, en grupos o coaliciones que serán capaces de negociar para lograr buen poder de decisión?

(2) ¿Cómo afectarán los resultados propuestos al status relativo de las mujeres con respecto a los hombres? Que es el impacto del proyecto en:

- Acceso y control sobre los recursos por diferentes individuos y grupos
- Validación o desafíos a diferentes conocimientos, creencias y prácticas de las personas
- Diferentes intereses y necesidades de las personas
- Participación de diferentes individuos y grupos

**CUADRO 1: MARCO PARA EL ANÁLISIS DE GÉNERO**

	El objetivo del proyecto/programa: <i>Mejorar la producción sostenible de productos forestales</i>	
	Información/Asuntos en relación a género	La información que falta (preguntas y preocupaciones)
<p><b>EL ACCESO A LOS BIENES</b></p>		
<p>LOS CONOCIMIENTOS, CREENCIAS, Y PERCEPCIONES</p>		

ESFERA	Información/Asuntos en relación género	La información que da respuesta y preocupaciones)
<p style="text-align: center;">LAS PRÁCTICAS Y LA PARTICIPACION</p>	<p><i>Favorecen a las mujeres como trabajadoras en las fabricas de empaque por las percepción que tiene habilidades mas delicadas para manejar los productos para el empaque.</i></p>	<ul style="list-style-type: none"> <li>▪ Estudio de las capacidades relativas de hacer los trabajos relacionados al procesamiento y empaque</li> <li>▪ Comparición de niveles de ingreso realizado por trabajo de empaque y trabajos de producción agrícola</li> <li>▪ Averiguar que oportunidades de empleo hay para hombres y mujeres (con y sin tierras agrícolas)</li> </ul>
<p style="text-align: center;">EL ESPACIO Y EL TIEMPO</p>		

ESFERA	Información/Asuntos en relación a género	La información que falta (preguntas y preocupaciones)
<p>LOS DERECHOS LEGALES Y EL ETATUS (El Marco institucional— nacional y sociocultural)</p>		
<p>EL PODER</p>		

**Instrucciones:** Tome la información identificada en el cuadro 1 y trate de analizar las implicaciones de dicha información usando las categorías en el Cuadro 2.

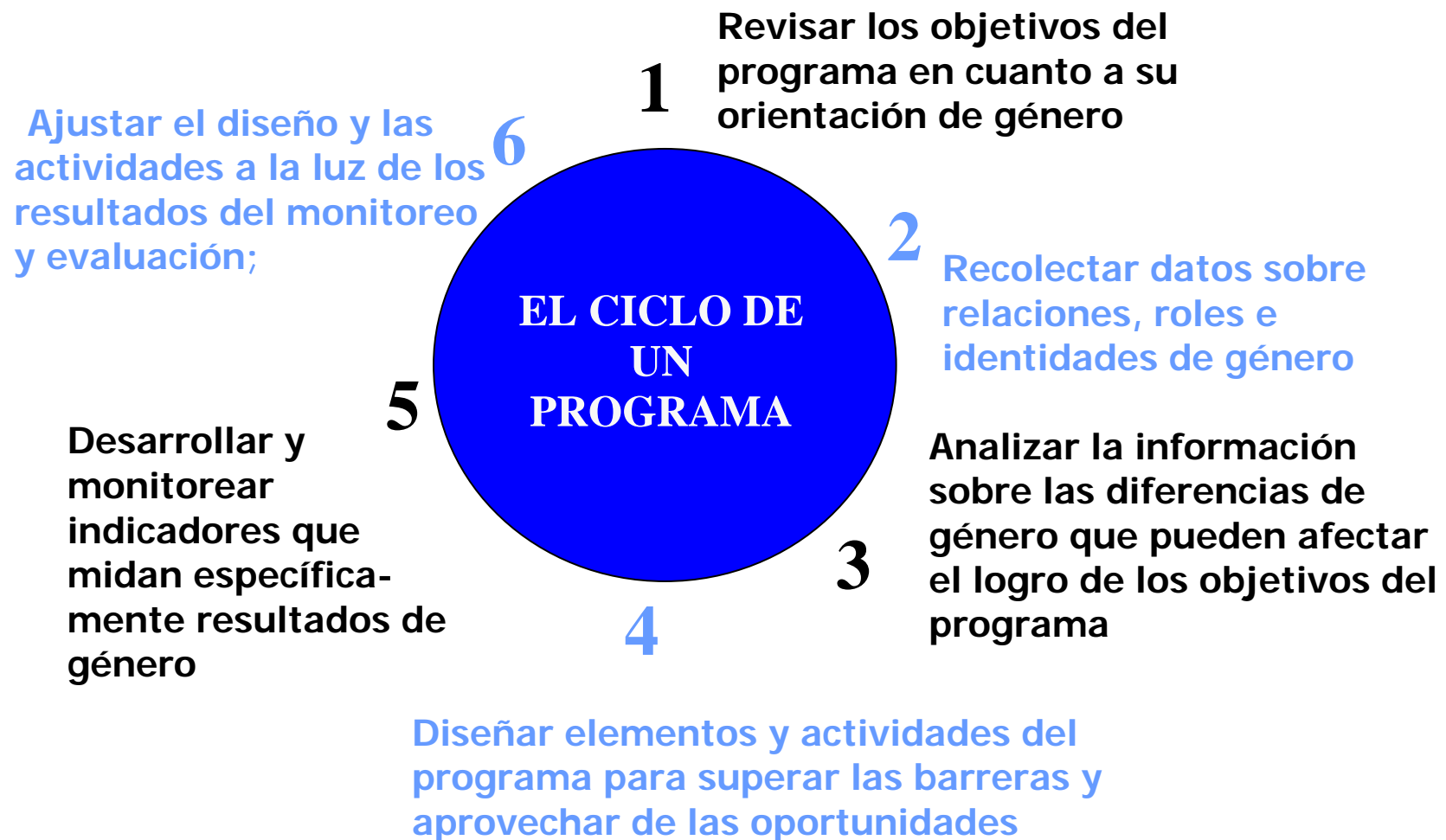
**Cuadro 2: Limitantes y oportunidades basadas en las relaciones de género para la planificación de proyectos**

La Esfera	¿Cual es el limitante (barrera) o facilitadora (oportunidad) de género?	¿Cómo afectarán las relaciones de género al logro de resultados sostenibles?	¿Cómo afectarán los resultados propuestos al status relativo de las mujeres con respecto a los hombres?	Acciones posibles
<u>El Acceso</u>				
<u>El Conocimiento, Creencias, y percepciones</u>				
<u>Las Practicas y la participación:</u>				



El espacio y tiempo				
Derechos Legales y el Estatus (marco institucional – nacional y sociocultural)				
Poder				
<b><i>Ejemplo para Practicas y Participación:</i></b> <i>Favorecen a las mujeres como trabajadoras en las fabricas de empaque por las percepción que por naturaleza tienen habilidades minuciosas</i>	<i>Los hombres, en particular los que no tienen tierras, se encuentran en un posición desventajosa frente a oportunidades nuevas del empleo generadas por el proyecto. .</i>	<i>Es probable que los hombres en hogares sin tierras migraran y la situación podría impactar negativamente a provisión de mano de obra durante épocas críticas productivas (ej. La siembra y cosecha)</i>	<i>Las mujeres en hogares de emigrantes podrían empobrecerse peor. Los hombres no van a tener otra opción que migrarse o quedarse sin empleo en el área del proyecto</i>	<i>Crear otros fuentes de trabajo para los para hombres sin tierras</i>

# UN PROCESO PARA INTEGRAR LA PERSPECTIVA DE GÉNERO EN EL CICLO DE UN PROGRAMA



**4. UN PROCESO PARA INTEGRAR LA PERSPECTIVA DE GÉNERO EN EL CICLO DE UN PROGRAMA**

<p><b>Pasos 1 y 6:</b> Revisar los objetivos del programa en cuanto a su orientación de género</p>	<p><b>Paso 2:</b> Recolectar datos sobre relaciones, roles e identidades de género que tienen relación con el logro de los resultados del programa.</p>	<p><b>Paso 3:</b> Analizar la información sobre las diferencias de género que pueden afectar el logro de los objetivos del programa (identificar factores limitantes y facilitadoras).</p>	<p><b>Paso 4:</b> Diseñar elementos y actividades del programa para atender asuntos de género.</p>	<p><b>Paso 5:</b> Desarrollar y monitorear indicadores que midan específicamente resultados de género; evaluar la efectividad de los elementos del programa diseñados para atender asuntos de género.</p>

## **APPENDIX 3: TRAINING MATERIALS IN ENGLISH**

### **1. AGENDA**

#### **USAID/Bolivia Gender and Sociocultural Equity Workshop**

La Paz, Bolivia August 16, 2004

- 8:30 Welcome by USAID Mission Representative
- 8:45 Workshop's goals, Norms, and methodology
- 9:00 Vote with Your Feet
- 9:45 Presentation Activity Domains for Gender and Sociocultural Analysis and work through case study in Plenary
- 10:45 Coffee Break
- 11:00 Application of Activity Domains to Projects in small groups by sector
- 11:45 Presentations by small groups
- 12:30 Exercise in Small Groups Gender and Sociocultural Constraints and Opportunities for Project Planning
- 13:00 Lunch
- 14:00 ADS Presentation/USAID Gender Requirements for Strategic and Project Planning
- 14:30 Gender and Sociocultural Integration in the Project Cycle Presentation and Plenary Example
- 15:30 Coffee break
- 15:45 Application of Sectoral Guidelines for Gender and Sociocultural Integration in the Project Cycle
- 16:45 Presentation of Findings from Small Groups
- 17:30 Identification of Next Steps, Commitments, and T.A. Requests
- 17: 45 Closing and Evaluation

## Case Study: Jaú National Park, Brazil<sup>4</sup>

**Project Objective:** Design a Conservation Strategy for National Park that combines gender-focused training, institutional strengthening, and community participation.

**Park Background:** Jaú National Park (PNJ) is located in the state of Amazonas, in the municipalities of Novo Airão and Barcelos. With an area of 2,272,000 hectares, it is the largest National Park in Brazil, and the largest protected area of tropical forest in the world.

The PNJ was created on September 24, 1980. As the goal of a co-management agreement between the Brazilian Institute for Environment and Renewable Natural Resources (IBAMA) and the Fundação Vitória Amazônica (FVA), a management plan was elaborated for the Park under the responsibility of FVA. The creation of the PNJ did not take into consideration the presence of people residing in the territory of the Park. The current legislation does not permit the presence of residents in the Park, but the reality is that they continue to reside there, seventeen years after the Park's creation. The question of whether or not residents can stay in the PNJ is a subject of much discussion lately, due to the impasse between the legislation and reality. Most of the residents (73%) know that they live in a National Park, but they do not know all objectives of a Park.

**Demographic Information:** Currently there are approximately 984 residents of the Park (approximately 159 domestic groups), of which 54% are male and 46% female of all ages. The population is distributed unevenly in the PNJ, with the majority living around the border areas (59%) and 41% in the interior, some of whom are isolated. Most of the population lives along rivers or streams. The population is predominantly young, with an average age of 18. Women start having children and building families at 16 years of age, and these families may or may not take up residence where the women were born.

There are 50% more males than females among the population of young people between 15 and 20 years of age, suggesting an out-migration of young women from the PNJ. Women's mean fertility rate is seven children per woman in the Park's population, although life expectancy is quite limited due to poor health conditions.

**Stakeholders:** Different groups currently are involved in the consolidation of the PNJ, either directly or indirectly. The groups with a direct interest are the FVA, IBAMA, and the Park residents. Those with indirect interests include local governments, politicians, fishing tourists, tropical fish merchants, and loggers. Groups less directly involved but which still have an interest in the management and control of the region include the Brazilian legislature and civil society at large.

### Phase 1: Socio-Economic Survey of Local Communities

An initial socioeconomic survey was carried out before the first Action Plan for the Park in April of 1992, with the participation of researchers from local and national institutions. During a pre-test of the survey, researchers were received by families, and the questions, although heard by all, generally were answered only by men with little or no participation by women in the responses. The researchers observed that for the census questions (name and number of children, documents, and schooling), the women were consulted by the men. Similarly, when asked question about fertility and mortality, leisure activities, migration, and consumption, men often called on their wives to respond.

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<sup>4</sup> Case study is excerpted from **Gender, Conservation, and Community Participation: The Case of the Jaú National Park, Brazil**, by Regina Oliveira & Elza Suely Anderson

The men, on the other hand, insisted on answering the questions about consumption of natural resources, principally hunting and collecting of turtles and turtle-eggs. However, when interviewed separately, women, who are responsible for preparing meals and managing the household's food, provided more accurate information about game consumption than the men, omitted much data related to game hunting, perhaps for fear of reprisals from Park authorities. Where there was no man present (principally widows or single women), women also answered the questions about resource collection and marketing.

### ***Subsistence Natural Resource Use***

**Fishing:** Men usually go out fishing in the morning. They use fishing lines (*espinhel*) or, bow-and-arrow techniques during scarce periods (when the river is high). The crickets and grasshoppers they use as bait are collected by the children in their backyard and stored alive. When men are occupied in the forest with other extractive activities, younger boys and women fish by using a pole (*caniço*), with the same kind of bait. Women generally go fishing with their younger children, including babies, when they don't have children old enough to take care of younger siblings. During the high water season (May to August), fishing consists of going out at night (usually at nightfall, beginning at about 7:00 p.m.), using a flashlight to blind the prey and a capture it with a harpoon. This activity takes up to eight hours, depending on the quantity of fish required. It is practiced more by men, although in some families women also do it. Cleaning and preserving the fish is almost exclusively a feminine task, involving women and daughters as young as 8 years old.

Capturing tortoises is exclusively a male task, although women and children collect eggs, principally in the dry season (August-September). Men principally clean and roast or boil the turtle meat, although women prepare some turtle dishes (*batido* and *guisado*). Men also are exclusively responsible for preparing the pens where turtles are kept in reserve.

**Hunting:** This is principally a male activity, although in some families women hunt too. The work of cleaning and preparing the game is a task for both men and women. Hunting is more accentuated during the flood season, when a larger area is underwater and therefore fish are less concentrated. The techniques used are traps, tracking and blinds. Hunting may be planned as a means to guarantee food during the preparation of the agricultural plot or extractive activities, or it may simply happen by chance, when people go out to fish or to collect forest products, taking their shotguns along. The principal game animals eaten are: paca (*Cuniculus paca*), peccaries (two species of *Tayassu*), and tapir (*Tapirus terrestris*), among others.

**Agriculture:** From clearing the land to the harvest, the whole family participates. It is up to the men, with help from their sons, to cut the smaller trees and clear the underbrush and, with axes, cut down the larger trees, leaving the Brazil nut trees, which are protected by Federal law. Men and their sons 8 years old and older also pile up the larger trunks and burn them. Many residents of the PNJ make a firebreak, which consists of a two-meter-wide trail around the area to be burned, in order to avoid spreading to other areas.

After the burning begins, planting of manioc (cassava), corn and fruit involves the whole family. Both men and women prepare the soil, plant, and harvest. Women plant different varieties of cassava as well as food crops such as sweet potatoes, *cará*, and *ariá*. Men also plant cassava, in addition to commercial crops such as bananas. Men, women and children harvest cassava. Women and children generally provide routine care of the plot, such as weeding (about four times per year). Young children accompany their parents to the fields when there is no one else to care for them.

The whole family participates in the process of making cassava flour. Part of the cassava harvested is soaked and the rest is peeled by women, older people and children. In the flour-making shed, the cassava

is grated and pressed by women, men and children. Men do the pressing, which requires great physical force to put the mass in the press and squeeze out all the water. After being pressed, the cassava mass is sifted (by the women and young children), and toasted on the oven. Men and women carry the firewood, and also share the task of constantly mixing and turning the flour on the oven.

Women are in charge of preparing other products made from cassava flour, such as tapioca, *tucupi* sauce (the liquid extracted from bitter manioc and used as a regional seasoning), and *beiju* (a kind of dry pancake), with the help of 8 to 16 year old boys and girls.

**Health:** Women are primarily responsible for their family's healthcare. Generally they maintain small medicinal plant gardens. Women provided researchers with information from about medicinal plant use, as well as about healthcare specialists, such as prayer healers (men and women), curers (only men) and midwives (only women).

#### *Commercial Natural Resource Use*

**Vines:** These are a winter product. Men generally go to their "centers" (forest camps), where they stay for a week or more. They try to leave food with their families, generally game meat. They may go alone or in partnership with close neighbors. When they are in the camps, they process the vines with permission from the neighbor closest to the camp (who may belong to a third family). According to one resident, vines are collected principally when men need to pay debts to a merchant, by collecting a large quantity of the product.

When they collect vines in areas near the house, it is up to the women and children to peel and process them after they return. The peeling is done by hand or with knives. Once they are peeled, the vines are cut in lengths of about 40-50 cm. Women, men and older children shred the vines in the evening.

The vines are used to make utensils such as *paneiros* (large baskets to carry cassava, or Brazil nuts, from the fields or forest), brooms and baskets. The *paneiros* are made by the men, and brooms and baskets by the women, although some men make these items as well. Men, generally household heads, are exclusively in charge of selling vines as a raw material. Women sell the utensils, like baskets and brooms to local merchants.

**Brazil nuts:** These are also a winter product. The whole family participates in the collection of the nuts, sometimes moving to other areas of the Park, building small temporary shelters, where Brazil nuts are found. Men walk into the forest and collect the nuts, using *paneiros* to carry them back to where women and older children use large knives to break open the nuts. The nuts removed from the outer husk are left in the shell, and are bagged and marketed by the men.

### **One summer day for a family on the Jaú River:**

This family has eight members: a man, his pregnant wife, and six children (two boys 11 and 4 years old, and four girls ranging in age from 8 to 2 years old). The family lives on the edge of the Jaú River, with six agricultural plots dating from different years. The 11-year-old boy is responsible for fishing, peeling vines, caring for the agricultural plot, and watching his younger siblings. The 8-year-old girl is responsible for taking care of her younger siblings, as well as making the cooking fire, cleaning fish, peeling vines, weeding the agricultural plot and the homegarden, taking care of the chickens, and other tasks.

At 6:00 a.m. the man leaves to go fishing, along with his older son. The woman goes to the river to wash clothes and the oldest daughter stays behind to take care of the younger boy and three little girls. The woman returns from the laundering, hangs out the clothes and goes to the field with the other children to weed until 11:00, when they go back to the house to wait for the husband and son to return. They eat some fruits from the homegarden and the woman goes to prepare her caieira, a pit for making charcoal: with the help of the children, she collects sticks and trunks scattered around the area near the house, uses the spade to dig a shallow rectangular hole about one by two meters, arranges all the sticks collected, sets them on fire and covers it with earth. Afterwards she goes to weed the homegarden with the children's help. The children stay around the house eating fruit or cassava flour.

Between 2:00 and 3:00 p.m., the man and his son return from fishing, and the woman and her oldest daughter go to the river to clean the fish and salt those that will not be eaten for lunch. They start preparing the fire in the wood-burning stove. The fish is boiled in a sauce and seasoned with salt and onions from the herb garden. If there is rice or beans, these are prepared too, and the whole family gathers to eat lunch. They usually eat sitting on the floor in the kitchen where the pots and plates are placed. After lunch, the woman and her eldest daughter sweep the floor, gather the dishes in a tub or bucket, and wash them at the river's edge. This often means going up and down slippery ramps carrying full tubs and buckets on their heads.

In the afternoon, the woman, her husband and the older children peel vines or go to weed the field, where they stay until 4:00 p.m. When the sun begins to set they all bathe and carry water to the house (a task carried out by the woman and older children). Between 6:00 and 7:00 p.m. dinner is prepared and served by the women, with her children's help. They all have dinner, and the woman and oldest daughter sweep, gather the dishes that will be washed the next day, and at 8:00 p.m. the children retire to sleep. The man, the woman and the older children peel vines until 10:00 p.m., when they also retire.

2.

3. A FRAMEWORK FOR GENDER ANALYSIS IN STRATEGIC PLANNING

**The ADS requires all USAID operating units engaged in a strategic planning process to examine two key questions with regard to gender issues:**

- (1) How will gender relations affect the achievement of sustainable results; and,*
- (2) How will proposed results affect the relative status of men and women?*



The ADS explains that in order to adequately address these two questions Strategic Objective Teams (SOTs) must take into account the *different roles of men and women*, as well as *the relationship and balance between them and institutional structures that support them*.<sup>5</sup> When possible, gender concerns should be treated as an integral part of the broad range of technical analyses conducted in preparation of the strategic plan rather than as a separate issue. More specifically, this framework facilitates the analysis of how gender relations operate in different domains of social life and development activities. It also helps to identify whether there are specific gender-based structural and institutional constraints that affect the relative status and opportunities open to men and women that can be addressed by development activities. In this framework, gender relations are analyzed across six domains to identify existing gender-based constraints. These six domains do not encompass the total range of human activity and there is some overlap among them, but they nevertheless provide a conceptual framework for addressing to the two questions posed by the ADS (listed above).

This framework should help USAID operating units and their partners to move beyond simply disaggregating process indicators by sex. It will move staff towards more accurately predicting the impact of development strategies and programs on the relative status of men and women as well as accounting for how well consideration of gender enhances the success of USAID programs.

The six domains that structure the gender analysis and identify gender-based constraints in this framework are:

1. **Access:** Access refers to being able to use the resources necessary to be a fully active and productive participant (socially, economically, and politically) in society. It includes access to resources, income, services, employment, information, and benefits
2. **Knowledge, Beliefs, and Perceptions:** This domain refers to the culturally-mediated gender ideologies that shape beliefs about the qualities and life goals or aspirations appropriate to different gender categories. It involves understanding how people interpret aspects of their lives differently according to gender categories. Men and women may have access to different types of knowledge, have diverse beliefs, perceive situations differently, and conform to gender-specific norms. In many cultural systems, some knowledge may be proprietary to only one gender category and hidden from another, limiting peoples' ability to participate in the full range of social experiences.
3. **Practices and Participation:** This domain refers to peoples' behaviors and actions in life – what they actually do – and how this varies by gender. It encompasses not only current patterns of action, but also the way that people engage in development activities. It includes attending meetings, training courses, accepting or seeking out services, and other development activities. Participation can be both active and passive. Passive participants may be present in a room where a meeting is taking place, and therefore may be aware of information transmitted, but do not voice their opinions or play a leadership role. Active participation involves voicing opinions and playing an active role in the group process.

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<sup>5</sup> Automated Directive System (ADS) Chapter 201.3.8.4 *Gender Analysis*

4. **Space and Time:** Gender often structures both the availability and allocation of time as well as the space in which time is spent. This domain includes recognizing gender differences in the division of both productive and reproductive labor, identifying how time is spent and committed during the day, week, month, or year, and in different seasons, and determining how people contribute to the maintenance of the family, community, and society. The objective here is to determine how people in different gender categories spend their time and what implications their time commitments have for their respective availability for program activities. An important question to ask about time availability is whether it is flexible, negotiable, and fungible.
5. **Legal Rights and Status:** Analysis of this domain involves assessing how people in different gender categories are regarded and treated by both the customary and formal legal codes and judicial systems. It encompasses access to legal documentation such as identification cards, voter registration, and property titles as well as rights to inheritance, employment, redress of wrongs, and representation.
6. **Power:** This sphere of social life pertains to the ability of people to decide, to influence, to control, and to enforce. It refers to the capacity to make decisions freely and to exercise power over one's body and within an individual's household, community, municipality, and the state. This includes the capacity of adults to decide about the use of household and individual economic resources, income, and their choice of employment. It also encompasses the right to engage in collective action, including the determination of rights to and control over community and municipal resources. Finally, it includes the capacity to exercise one's vote, run for office, be an active legislator, and to enter into legal contracts.

Against this background information about how gender relations are expressed in these six domains, the next step towards strategic planning requires identifying **gender-based constraints** that might influence the achievement of sustainable results. Gender-based constraints are those barriers that limit or prohibit equal rights and equitable access to resources and opportunities. Similarly, analysis may also reveal gender-based opportunities for development.

- **Gender-based constraints** are factors that inhibit men's or women's access to resources, behavior and participation, time use, mobility, rights, and exercise of power based on their gender identity.
- **Gender-based opportunities** are structural and institutional factors that facilitate women's and men's equitable access to resources, behavior and participation, time use, mobility, rights, and exercise of power

To move from description to identification and analysis of gender-based constraints as well as opportunities, it is helpful to develop key questions for each of the six topical areas listed above.

### Examples of Key Questions

(1) How will gender relations affect the achievement of sustainable results?

- **Access:**

**Constraint:** Does unequal access to project resources and services prevent the project from reaching its goals?

**Opportunity of Facilitating Factor:** Are there instances of equitable access with regard to certain types of resources that might provide a model for access to other resources?

- **Knowledge, Beliefs, and Perceptions:**

**Constraint:** Are there gender-specific beliefs that will impede project outcomes?

**Opportunity or Facilitating Factor:** Is there gender-specific knowledge that will facilitate decisions that are essential for reaching project goals?

- **Practices and Participation:**

**Constraint:** Are people who are excluded based on their gender (even inadvertently) result in passive or active sabotage of project activities?

**Opportunity or Facilitating Factor:** Are there types of gender-specific leadership roles that might provide the basis for broader participation?

- **Space and Time:**

**Constraint:** Are there gender-specific roles that prevent some people from participating in program activities because they work in a particular place?

**Opportunity or Facilitating Factor:** Does the gendered division of labor provide a useful framework for distributing project resources equitably and in a way that will be supportive of project objectives?

- **Legal Rights and Status:**

**Constraint:** Do gender-discriminatory laws inhibit rights to property?

**Opportunity or Facilitating Factor:** Does a gender-neutral legal structure create an opportunity to push for gender equity in employment benefits or inheritance?

- **Power:**

**Constraint:** Are people who are excluded from making decisions based on their gender likely to suffer adverse consequences from the decisions made by others?

**Opportunity:** Is it possible organize individuals who are excluded from making decisions based on their gender into groups or coalitions that may be able to negotiate for great decision-making power?

(2) How will proposed results affect the relative status of men and women? What is the impact of the project on:

- Access and control over resources by different individuals and groups?

- Validation or challenges to different people's knowledge, beliefs, and practices?

- Different peoples' interests and needs?

- Participation of different individuals and groups?

**Directions:** Analyze the information provided in the case study to identify issues that pertain to the different activity domains. Develop a list of gender-related questions for each domain that one should answer in order to better understand how gender relations will affect the project.

**Table I: Gender Analysis Framework**

DOMAIN	Project Objective:	
	Information/Issues on Gender	Missing Information on Gender (Questions/Concerns)
ACCESS TO ASSETS		

KNOWLEDGE, BELIEFS, AND PERCEPTIONS		
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DOMAIN	Information/Issues on Gender	Missing Information on Gender (Questions/Concerns)
PRACTICES AND PARTICIPATION		
SPACE AND TIME		

DOMAIN	Information/Issues on Gender	Missing Information on Gender (Questions/Concerns)
LEGAL RIGHTS AND STATUS		
POWER		

**Directions:** Take the information that you identified in Table 1 and try to analyze the implications of that information using the categories in Table 2.

**Table 2: Gender Constraints and Opportunities for Project Planning**

Key Gender Constraints/Opportunities	What is the identified gender-based constraint or opportunity?	<b>(1) How will gender relations affect the achievement of sustainable results?</b>	<b>(2) How will proposed results affect the relative status of men and women?</b>	Possible actions to address the constraints and opportunities to achieve more equitable outcomes
Access				
Knowledge, Beliefs, and Perceptions				
Practices and Participation				



Key Gender Constraints/Opportunities	What is the identified gender-based constraint or opportunity?	<b>(1) How will gender relations affect the achievement of sustainable results?</b>	<b>(2) How will proposed results affect the relative status of men and women?</b>	Possible actions to address the constraints and opportunities to achieve more equitable outcomes
Space and Time				
Formal and Customary Legal Frameworks				
Power				

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