

GUIDANCE NOTE ON DOCUMENTING QUALITATIVE GENDER EQUALITY RESULTS

I. PURPOSE OF THIS GUIDE

1. This guidance note aims to assist the Asian Development Bank (ADB) South Asia Department (SARD) and partner program and project agencies in collecting and presenting testimonials of select direct beneficiaries of a project's gender action plan (GAP) or gender equality and social inclusion (GESI) action plan (GESI/AP) activities. The purpose is to enrich the report on the achievements of the completed GAP or GESI/AP. These testimonials will be presented in an appendix of the project completion report (PCR) after the GAP or GESI/AP achievements matrix.

2. As the GAP or GESI/AP activities could be unique to a program or project, the actual application of this guidance note will be customized to match the program's or project's specific GESI features.

II. FOCUS OF STORIES TO BE COLLECTED

3. The GESI activities can generally be grouped under the following five broad categories:

- 3.1. **Human capital development:** (i) education, skills development, and learning events; (ii) public awareness campaigns; and (iii) production of awareness-raising materials, training modules, and knowledge products.
- 3.2. **Provision of economic, financial, and/or social support:** (i) livelihood opportunities, (ii) business development services, (iii) school improvement, (iv) health services and facilities, (v) social protection services, (vi) agricultural production, and (vii) financial resources and services.
- 3.3. **Access to basic infrastructure:** (i) electricity; (ii) water supply and sanitation (e.g., toilets and wastewater treatment); (iii) roads (including road safety features) and transport facilities (e.g., railway, water transport, buses and intermediate means of transport, air transport facilities); (iv) housing facilities; and (v) warehouses for crops.
- 3.4. **Employment and economic opportunities:** (i) allocation of a percentage of project staff positions; and (ii) employment in the construction, rehabilitation, operation, and maintenance of infrastructures.
- 3.5. **Participation in decision-making:** (i) representation in committees and leadership positions, and (ii) participation in consultations and key project activities and in governance (leadership and management) or decision-making processes.

4. The results of these activities could be in all or any of the following five areas: (i) **women's economic empowerment**, (ii) **gender equality in human development**, (iii) **gender equality in decision-making and leadership**, (iv) **reduced time poverty of women**, and (v) **women's resilience to external shocks**.¹ As the beneficiaries also include men and boys (e.g., initiatives of the Sri Lanka Resident Mission to **engage men and boys to achieve GESI results**) and disadvantaged groups (e.g., focus of the Nepal Resident Mission on **socially excluded ethnic groups as project target beneficiaries**), the stories may go beyond these five GESI results.

5. In sum, the stories to be collected will be on how participating in each type of activities in para. 3 (choose only those activities that are relevant to the project under review) has resulted in the benefits listed in para. 4 (choose only those benefits that apply to the project under review). The following table juxtaposes each type of activities with each type of benefits.

¹ ADB. 2018. *Strategy 2030: Achieving a Prosperous, Inclusive, Resilient, and Sustainable Asia and the Pacific*. Manila. para. 42, p. 15.

Stories to Collect: Gender Equality and Social Inclusion Benefits of Different Types of Activities

GESI Results	Types of Activities in a Project GESI Action Plan					
	1. Human Capital Development	2. Economic, Financial, and/or Social Support	3. Access to Basic Infrastructures	4. Employment and Economic Opportunities	4. Participation in Decision-Making	5. Other Activities
1. Women's economic empowerment	How attendance in training and public awareness campaign helped improve livelihood and increase income of women	How economic, financial, and/or social support helped improve livelihood and increase income of women	How access to basic infrastructures helped improve livelihood and increase income of women	How employment and other related economic or job opportunities created by the project helped improve livelihood and increase income of women	How representation in committees and leadership positions and participation in consultations and project activities helped improve livelihood and increase income of women	How other activities in the GESI action plan helped improve livelihood and increase income of women
2. Gender equality in human development	How attendance in training and public awareness campaign helped improve women's self-confidence and abilities	How economic, financial, and/or social support helped improve women's self-confidence and abilities	How access to basic infrastructures helped improve women's self-confidence and abilities	How employment and other related economic or job opportunities created by the project helped improve women's self-confidence and abilities	How representation in committees and leadership positions and participation in consultations and project activities helped improve women's self-confidence and abilities	How other activities in the GESI action plan helped improve women's self-confidence and abilities
3. Gender equality in decision-making	How attendance in training and public awareness campaign helped improve women's leadership qualities and participation in decision-making in the family and community	How economic, financial, and/or social support helped improve women's leadership qualities and participation in decision-making in the family and community	How access to basic infrastructures helped improve women's leadership qualities and participation in decision-making in the family and community	How employment and other related economic or job opportunities created by the project helped improve women's leadership qualities and participation in decision-making in the family and community	How representation in committees and leadership positions and participation in consultations and project activities helped improve women's leadership qualities and participation in decision-making in the family and community	How other activities in the GESI action plan helped improve women's leadership qualities and participation in decision-making in the family and community
4. Reduced time poverty of women	How attendance in training and public awareness campaign helped women reduce their time for household chores and increase time for livelihood and self-development	How economic, financial, and/or social support helped women reduce their time for household chores and increase time for livelihood and self-development	How access to basic infrastructures helped women reduce their time for household chores and increase time for livelihood and self-development	How employment and other related economic or job opportunities created by the project helped women reduce their time for household chores and increase time for livelihood and self-development	How representation in committees and leadership positions and participation in consultations and project activities helped women reduce time for household chores and increase time for livelihood and self-development	How other activities in the GESI action plan helped women reduce time for household chores and increase time for livelihood and self-development
5. Women's resilience to external shocks	How attendance in training and public awareness campaign helped women respond to natural and human-induced disasters	How economic, financial, and/or social support helped women respond to natural and human-induced disasters	How access to basic infrastructures helped women respond to natural and human-induced disasters	How employment and other related economic or job opportunities created by the project helped women respond to natural and human-induced disasters	How representation in committees and leadership positions and participation in consultations and project activities helped women respond to natural and human-induced disasters	How other activities in the GESI action plan helped women respond to natural and human-induced disasters

GESI = gender equality and social inclusion.

Source: SARD GESI Team.

III. METHODS FOR STORY COLLECTION, ANALYSIS, AND PRESENTATION

Selection of Sample Beneficiaries

6. The sample size of qualitative studies typically ranges from 5 to 50.² For our purposes, a sample of 10 beneficiaries is sufficient. This could be increased if more than 10 beneficiaries have unique testimonials to tell. **Criteria for selection may include** (i) gender (women, men, girls, boys); (ii) ethnic groups, if applicable; (iii) project community sites (urban-rural or typical community, or community with the highest number of beneficiaries, etc.); (iv) age (young women and old women); and (v) recommended

by the project implementing agency or leaders in the community or community-based organization based on post-activity behavior or involvements.

7. To get the best stories, it would be best to identify those who were involved in multiple types of project activities, if any. For example, for projects that provided electricity supply and other services, choose beneficiaries that received multiple services under the project, such as women whose households were connected to electricity by the project, trained in energy-based livelihood, provided with business development services, and represented in project committees. Seek the help of the implementing agency in identifying these beneficiaries.

² Statistics Solutions. Qualitative Sample Size. <http://www.statisticssolutions.com/qualitative-sample-size/>.

8. If children (age below 18) will be among the sample beneficiary storytellers, in conformity with the **International Charter for Ethical Research Involving Children**, seek a written or verbal consent of each child's parents or guardians and explain to the child that she or he may refuse to participate or to answer some questions.³

Story Collection Methods

9. Two methods can be used to collect the stories: **individual interviews** and **focus group discussions (FGDs)**. Each method has advantages. In **individual interviews**, the interviewer can give unstructured questions that are focused on the experience of a beneficiary. The beneficiary also has time to share the details of her or his story, including the parts that she or he is not ready to share in the presence of other beneficiaries (but has agreed to share with an interviewer with assurance of confidentiality, that is, her or his name will not be mentioned in the report). On the other hand, in an FGD, the participants can help each other remember, validate, and enrich their stories. The interactions and exchanges during the FGD can also stimulate each other's storytelling. However, an FGD may take more time as each participant has to wait for all participants to finish their stories. Depending on the locations of the beneficiaries (how far they are from each other), one FGD (10 participants) or two FGDs (from 5 to 6 participants per FGD) may be done.

10. Whether it is interview or FGD, the following general questions may be asked:

10.1. In what specific activities of the project were you and your family involved? Please share when and how you participated in these activities. (*You may use table for your probing questions* [e.g., Did you participate in training or public awareness campaign? If yes, please share your experience in these activities]).

10.2. What benefits did you receive from these project activities? (*You may also use table for your probing questions* [e.g., Did your involvement in the project activity help you improve your livelihood and income? If yes, please share how that happened and how that changed your relationship with your spouse and other members of your family and community]).

11. For objective documentation of each interview and FGD, audio-record and transcribe the storytelling with the consent of the participants.

Collation and Analysis of the Stories

12. The collected stories may be organized and presented according to types and levels of benefits.

12.1. The types of benefits refer to the list of GESI results in para. 4 and table: (i) women's economic empowerment, (ii) gender equality in human development, (iii) gender equality in decision-making and leadership, (iv) reduced time poverty of women, and (v) women's resilience to external shocks.

12.2. There are two levels of benefits: practical and strategic gender benefits.

- **Practical gender benefits** refer to short-term benefits that have helped ease (but did not change) the gender roles of women and men, such as women's less time for household chores and less exposure to indoor pollution due to improved household appliances and women's improved skills in traditional occupations (e.g., sewing, cooking, home-based livelihood). They also refer to the expansion of women's involvements and opportunities such as sources of livelihood, participation in community activities, increased mobility, and more health and educational facilities without transformation of their gender roles.

- **Strategic gender benefits** are long-term benefits, particularly the transformation of gender roles and relations (e.g., sharing of household chores between women and men, girls and boys; women's participation in leadership structures; women's access to and control of resources and opportunities that are traditionally reserved for men; participation in decision-making in the households, organizations, and communities); recognition of women's potentials and involvement in nontraditional careers and occupations; increased opportunities to own and manage economic resources (e.g., income, enterprises, land); and recognition and promotion of rights such as right to study, select own occupations based on interests and competencies, decide when to get married or not to marry, choose a spouse or partner, and decide if and when to bear children.

12.3. Under each type of benefit, present the gist of each story in the form of testimonials (in "first-person" or storyteller's perspective) about the practical and strategic gender benefits of the GAP or GESI/AP activities.

13. For an overview of the cited benefits, identify the top three to five most frequently mentioned. Note that a beneficiary may mention multiple benefits. The least frequently mentioned benefits may also be presented at the end of the report.

³ A. Graham et al. 2013. *Ethical Research Involving Children*. Florence: UNICEF Office of Research–Innocenti.

Timing of Story Collection, Needed Resources, and Presentation

14. These stories will be collected by the project’s GESI expert as part of the preparation of the PCR. The GESI expert may also collect initial stories during the project’s review missions, 2–3 years after project implementation started. During the project design

phase, ensure that the collection of these stories is included in the list of tasks of the GESI expert and that needed budget is stated in relevant project documents.

15. The following template may be used in presenting the stories in the appendix of the PCR.

Testimonials of Women and Other Beneficiaries on the Project’s Gender Equality and Social Inclusion Benefits

Evidences of the Project’s Gender Equality and Social Inclusion Results (to be presented after the GAP or GESI/AP achievements matrix in the appendix of the PCR)

1. Introduce the general contents of this section and the methods for selecting the beneficiaries and collecting the stories. Example: Presented here are testimonials of select beneficiaries on the gender equality and social inclusion (GESI) results of the project. These testimonials were collected through interviews [or focus group discussions] with ___ [number of] project beneficiaries in _____ [project site] on _____ [date]. The following is a general profile of these beneficiaries (state the number of beneficiaries per category):

Sex		Occupations (a beneficiary may have multiple occupations)			
Female		1. Housekeeping	4. Government worker		
Male		2. Farming	5. Student		
Others		3. Own business	6. Others: _____		
Age Group		Civil Status		Education	
Less than 30		Single		Grade school	
31–40		Married or with partner		High school	
41–50		Divorced or separated		College	
More than 50		Widow			
Ethnic Groups (if applicable)					
1.		3.		5.	
2.		4.		6.	

2. Provide a general description of the testimonials. Example: Overall, the collected testimonials reflect the following gender equality results: (see para. 4 of the main text for the list of gender equality results). These results are in two levels—practical and strategic. In general, strategic gender benefits are related to the transformation of the traditional gender roles and relations of women and men in the households, sector, communities, and organizations and the opening of nontraditional resources and occupations to women; whereas practical gender benefits are short-term benefits that have helped ease, but did not change, the traditional gender roles and relations of women and men.

2.1 Women’s Economic Empowerment

Top 3-5 Benefits Mentioned	Frequency of Mention ^a
a)	%
b)	%
c)	%
d)	%
e)	%
Strategic Gender Benefits	
<ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	
Practical Gender Benefits	
<ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	

2.2 Gender Equality in Human Development

Top 3-5 Benefits Mentioned	Frequency of Mention ^a
a)	%
b)	%
c)	%
d)	%
e)	%
Strategic Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	
Practical Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	

2.3 Gender Equality in Decision-Making and Leadership

Top 3-5 Benefits Mentioned	Frequency of Mention ^a
a)	%
b)	%
c)	%
d)	%
e)	%
Strategic Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	
Practical Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	

2.4 Reduced Time Poverty of Women

Top 3-5 Benefits Mentioned	Frequency of Mention ^a
a)	%
b)	%
c)	%
d)	%
e)	%
Strategic Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	
Practical Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	

2.5 Women's Resilience to External Shocks

Top 3-5 Benefits Mentioned	Frequency of Mention ^a
a)	%
b)	%
c)	%
d)	%
e)	%
Strategic Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	
Practical Gender Benefits <ul style="list-style-type: none"> • Story Theme 1 (Provide here the theme of the story or set of stories) Write the story in a testimonial form (the storyteller speaking) and in a concise manner. (Cite source of story) • Story Theme 2 (Same form as above; you may add more themes and testimonials if any) (Cite source of story) 	

3. Provide a list of least mentioned benefits, if any.

^a Frequency of mention refers to the percentage of participants who mentioned each benefit.

About the Asian Development Bank

ADB is committed to achieving a prosperous, inclusive, resilient, and sustainable Asia and the Pacific, while sustaining its efforts to eradicate extreme poverty. Established in 1966, it is owned by 68 members—49 from the region. Its main instruments for helping its developing member countries are policy dialogue, loans, equity investments, guarantees, grants, and technical assistance.



Creative Commons Attribution 3.0 IGO license (CC BY 3.0 IGO)

© 2019 ADB. The CC license does not apply to non-ADB copyright materials in this publication.

<https://www.adb.org/terms-use#openaccess>

ISBN 978-92-9261-638-0 (print), 978-92-9261-639-7 (electronic)

Publication Stock No. TIM190188-2

<http://www.adb.org/publications/corrigenda>

pubsmarketing@adb.org

DOI: <http://dx.doi.org/10.22617/TIM190188-2>



Printed on recycled paper