WOMEN'S ECONOMIC LEADERSHIP IN LATIN AMERICA AND THE CARIBBEAN

Book 2: A Guide to Implementation
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1. FOREWORD

Since 2008, Oxfam has been designing programmes to better address power imbalances between men and women in agricultural markets.

Oxfam makes choices on where to invest and intervene in agricultural markets to maximise women smallholders’ potential for economic leadership. Women’s Economic Leadership (WEL) is about identifying market sub-sectors that are commercially viable, and from which most women can benefit. Likewise, investments can increase women’s power in market systems by ‘upgrading’ them to roles that are more profitable and less risky – beyond production to processing or inputs. Crucially, WEL methodology links this market analysis with gendered analysis of household work, women-specific risks, gender-based violence and norms about women and men in communities in order to increase women’s agency. WEL also promotes gender equality in economic decision-making and policy advocacy.

Women small-scale producers are central to meeting the growing global demand for food, and are becoming more involved in agricultural markets in developing countries. Yet, in comparison to their male counterparts, women are often limited by poor access to the services and resources needed to properly enter and compete in agricultural markets. Investments in producer groups and marketing associations need to be more effective in promoting women’s participation, benefits and leadership. Agricultural development strategies too often overlook vital services and infrastructure that support household work, and which are crucial to alleviating rural women’s time poverty. Thus, women’s engagement in markets does not necessarily result in increased income and control over assets. Adaptation and risk-management strategies must be inclusive of women’s lifecycle risks, gender-based violence and the gendered impacts of climate change.

WEL means groups of women gaining economic and social power to move out of poverty. In practical terms, this means:

- Securing economic resources.
- Gaining power in markets.
- Building effective collective action for women in formal and informal groups.
- Changing attitudes and beliefs to enable equal relations with men, recognising the value of unpaid productive and care work, and promoting women’s role in economic decision-making.
- Addressing women-specific risks, gender-based violence, and the gendered impact of climate change.

Our starting point for promoting WEL is one of rights. Women have the right to participate equally and fully, and enjoy equal control in the economy. We also base our work on a fundamental economic argument that gender inequality slows economic growth and, conversely, gender equality can increase the productivity of investments in agriculture and other livelihoods initiatives. Women economic leaders can be producers, entrepreneurs or wage workers.

Promoting WEL in agricultural markets

Programmes that promote WEL in agricultural markets aim to:

- Enable smallholder women to gain power in markets independently and equitably.
- Enhance their ability to decide how resources are invested in agriculture at household level and more widely.
- Support women’s collective action groups in agriculture.
- Make visible the significant economic contribution of women smallholders to agricultural development, including unpaid productive and care work.
- Incorporate a long-term strategy for facilitating systemic change with many value chain stakeholders (e.g. traders, processors, exporters, government authorities, producer organisations) by transforming gender roles and relations in agricultural markets and raising women’s share of the benefits from agricultural development.
2. THE PURPOSE OF THIS GUIDE:

This guide aims to improve the readers’ knowledge about the Women’s Economic Leadership (WEL) methodology, in order to be equipped to deliver interventions that reduce poverty and, more specifically:

- Influence changes in diverse dimensions of women and men’s lives, such as their position in markets, communities and households.
- Contribute to improving women’s position and power in society, unleashing their potential and recognizing their added value in markets, communities and also within the family.
- Leverage resources with actors from different sectors to sustain and scale up potential changes.
- Contribute to the gender justice agenda, as a key entry point for advancing women’s rights.

This guide offers tools for analysis and learning in order to complement and accompany field experience and practice. The contents of this guide should form part of a continuous learning processes.

2.1. WHO THIS GUIDE IS FOR

This guide is intended for WEL trainers and implementers who are leading the design, implementation and evaluation of WEL programmes and projects on the ground. Ideally, WEL is to be delivered by multidisciplinary teams that combine a diverse and varied skill set (see ii.3). This guide seeks to support these multidisciplinary teams by providing basic information and practical examples of how WEL can be implemented.

This guide should be used by the leaders of WEL programme delivery, including:

- Oxfam programme staff and management
- WEL technical support staff and/or trainers
- WEL trainers, who will deliver WEL training and capacity development processes using this guide and the facilitation package
- Technical staff that is implementing WEL, whose main role will be to engage with others to bring about the changes proposed in WEL.
- Oxfam partners focused on capacity development, risk management and business support

The abovementioned leaders in WEL implementation can use this guide to support the diverse collective of actors and stakeholders involved in delivering WEL projects. These participants may include the following:

Community leaders and producer organizations
- Individual entrepreneurs and groups of entrepreneurs
- The state, policy makers, civil society groups working in the same territories
- Private sector with a clear interest in promoting women’s economic leadership
- Local experts in gender
- Local experts in business development
- Local women’s organizations or allies

This guide is not designed for use by beneficiaries or by entrepreneurs directly, as it proposes several simultaneous processes to support successful business development.
2.2. MULTIDISCIPLINARY EXPERTISE

A multidisciplinary team of experts with diverse skills and experiences should collectively lead the implementation of WEL. This will ensure the identification of barriers and opportunities from unique and complementary perspectives, in order to promote sustained changes related to women’s economic leadership. Consultation and collaboration in areas such as business development and gender justice are a precursor for successful implementation, as well as including additional expertise as required.

This approach aims to foster collaboration and push practitioners beyond their comfort zones- stretching our thinking to explore new areas and perspectives, and combine fields of expertise. Engaging in partnerships towards building long-term relationships will allow us greater success in the process. In order to effectively promote synergies and facilitate change, complementary partnerships should be sought to maximize strengths. The implementing WEL team should have combined skills and experience in economics and business planning, gender and community development, abilities for engaging multiple actors at a local level aimed at policy change, as well as basic project management skills.

Table 1: Collective Skills, Abilities and Experience Required for WEL Delivery:

<table>
<thead>
<tr>
<th>Economics and Business</th>
<th>Gender and Community Development</th>
<th>Policy and Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Deliver sound market assessments and identify most profitable endeavours</td>
<td>• Analyse behaviour, attitudes, beliefs and values of local populations, using a gender perspective</td>
<td>• Expertly engage others, through negotiation and communications</td>
</tr>
<tr>
<td>• Support business plan development</td>
<td>• Conduct a gender-based needs assessment at the local level</td>
<td>• Inform a diverse set of actors that can contribute to sustainability and scalability of changes in a specific territory</td>
</tr>
<tr>
<td>• Support business skill development in WEL beneficiary populations</td>
<td>• Do gender analyses about how change happens at different levels</td>
<td>• Communicate evidence of change generated by the processes</td>
</tr>
<tr>
<td>• Guide groups and entrepreneurs in the identification and development of market opportunities with a high potential for women`s leadership</td>
<td>• Gender sensitive assessments of potential outcomes of WEL, including safety from Violence</td>
<td>• Leverage evidence of change to promote broader impact and changes in policy, in the private sector and the State</td>
</tr>
<tr>
<td>• Analyse how best to minimize risks and avoid potential negative outcomes</td>
<td>• Facilitate the creation of support networks and reflection spaces</td>
<td></td>
</tr>
</tbody>
</table>
2.3. NOTE ON THE BENEFICIARY POPULATION

Oxfam has a clear mandate to work with the most vulnerable populations—keeping gender at the core of its work. However, WEL initiatives focus on the creation or scale up of small and medium enterprises, requiring time and knowledge to manage the business unit, as well as involvement, collaboration and support for the household.

Because of this focus, women and men participating as WEL beneficiaries do not live in conditions of extreme poverty. These beneficiaries are usually already engaged in managing a business or economic income-generating activity, and have the basic skills necessary to do so.

Communities on a larger scale can benefit from WEL processes in a particular value chain as suppliers or as receivers of new products and services.

WEL can be implemented in both rural and urban settings, as well as with individuals or collectives such as producer organizations, cooperatives and women’s organizations. Where WEL is implemented with individuals, it is important to rely on support networks that address some of the challenges for sustaining women’s economic empowerment, such as social, cultural and peer groups for women.

Figure 1: Beneficiary Population
2.4. UNDERSTANDING OUR LIMITATIONS

Trying to achieve multi-dimensional change can be overwhelming, and not everything can be achieved at once. The sustainable achievement of long-term, complex goals requires the delivery of diverse interventions over time. This guide will help the reader to prioritize the most strategic interventions for achieving impact at household, community and market levels. It will contribute to the adoption of a “gender lens” for WEL programme design and implementation.

This approach aims to challenge market dynamics and conditions, social norms, as well as values, beliefs, attitudes and behaviours that are deeply rooted in our social fabric. Barriers to women’s economic leadership have existed for centuries, and perceptions don’t change easily or quickly!

Providing the required tools to run a successful business might be a task that takes several months to a couple of years, but changing attitudes and beliefs of individual men and women, families, communities and markets takes considerably longer- usually beyond a project’s time frame. It is important however, to contribute towards complex, longer-term changes, and understand that evidence of these changes can only be seen over time.

The WEL methodology contains no formulas or solutions to every question or situation. The reader will need to analyse and consult with others in order to design and implement the optimal strategies that are appropriate for each context and moment in time, while keeping an open mind and facilitating the learning process of all actors involved.

2.5. HOW TO USE THIS GUIDE

This document encourages the reader to review concepts in conjunction with examples and anecdotes from practice, in order to build the links between theory and practice. This guide also makes reference to other related resources for further inquiry.

- At the beginning of each chapter, you will find:
  - A list of topics and issues covered
  - A short description of what you are expected to achieve
  - A list of key concepts you should understand prior to reading the chapter
- Within the body of each chapter, you will find:
  - Narrative outlining the WEL methodology
  - Anecdotal evidence, summarizing experiences from the field that are relevant to the chapter content. These stories illustrate the processes from a practical perspective and serve as examples for implementation.
  - References to additional material, including other sources of reading or chapters that delve deeper into complimentary topics.
- At the end of each section, a summary of conclusions will reinforce the content covered
THE WOMEN'S ECONOMIC LEADERSHIP METHODOLOGY

This Booklet outlines the steps of the WEL methodology. Presented here is a description of WEL, its justification and the steps to follow or adapt to programmes. Readers should be able to identify and respond to market opportunities and promote new, strategic economic roles for women, while working to influence relevant changes at individual and household levels, together with a diverse set of actors.

OVERVIEW

What is WEL?
WEL is an approach for working with small and medium enterprises as well as market programmes with an explicit prioritization of increasing women’s power in markets and wider society, originally focused on the agricultural sector, but now with a wider scope. (Please refer to the section 1.5 of the “Guide to Key Concepts for Women’s Economic Leadership Programmes” for a broader definition)

Business Case for the WEL Approach
Oxfam (2011a) asserts that there are different arguments for WEL that can be used in different settings, depending on the audience:

1. Women’s and human rights
   a. Gender inequality and the denial of women’s basic human rights is one of the greatest barriers to poverty eradication worldwide. Kabeer (2003, p.8) points out that households are made poorer when some of their members are systematically confined to the lower echelons of the informal economy in casual wage work, in undercapitalized self-employment, home-based work or in unpaid family labour.
   b. Achieving gender justice means overcoming such inequality in society, policy and in the economy – this requires working together, across livelihoods, advocacy, rights-based and social change focused initiatives.
   c. WEL is just one of the approaches Oxfam uses in agricultural markets to promote gender equality – from the starting point of economic development. Oxfam also works on national economic policy, food security and social protection programmes, empowering wage workers, and urban livelihoods.

2. The business case
   a. Carter (2007) asserts that companies with more participation of women on boards outperform other companies by 53% more return on equity, 43% more return on sales, and up to 66% return on capital.
   b. According to Chan (2010, p.18-24), investing in women smallholder-based supply chains can deliver several commercial benefits, such as improved product quality, increased productivity, reduced management and coordination costs, a secure supply base, a stronger brand, improved access to premium markets, and also improved delivery of broader corporate social responsibility goals.

3. The development case
   a. According to the UN’s Food and Agriculture Organization (FAO, 2011, p.5), equal access to key assets could raise total agricultural production in developing countries by 2.5- 4%, and potentially raise production on women’s smallholdings by as much as 20%. This increase in agricultural production would, in turn, reduce the number of hungry people in the world by 12-17%, or 100-150 million people.
   b. Studies in Brazil and Kenya show that, when income is in the hands of the mother of a family, the probability of child survival increases by about 20%, as they invest more of their income in health and nutrition.
Figure 2: WEL Steps as a Parallel Sequence
Description of the WEL Steps

**STEP 1**
Situational assessment of men and women in communities and markets

**STEP 2**
Gendered Market Selection

**STEP 3**
Gendered Market Mapping

**STEP 4**
Identification of WEL opportunity

**STEP 5**
Business plan viable for women

**STEP 6**
Influencing positive changes at the household level

**STEP 7**
Engaging others

- Household and community
- Market and opportunity
- Ecosystem and stakeholder engagement
The WEL approach includes a set of seven steps. Some of them are expected to happen sequentially, others need to be considered throughout the whole process. The following table gives a short description of what these steps are and how they are related.

### Table 2: WEL Steps Description and Interrelations

<table>
<thead>
<tr>
<th>Step</th>
<th>Expected Outputs</th>
<th>Relationship to Other Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1: Situational assessment of men and women in communities and markets</strong></td>
<td>A better understanding of power dynamics, gender roles, and who has access to, and control over resources and assets in a specific community. The household economy requires special attention at this point— including productive, reproductive, paid and unpaid work.</td>
<td>This step feeds analyses into steps 2 through 5 and sets the stage for step 6. Initial information about markets, potential allies and opportunities is also obtained. You should always start with this step.</td>
</tr>
<tr>
<td><strong>Step 2: Gendered Market Selection</strong></td>
<td>Selection of the market that offers most potential for economic growth and women’s participation and leadership. Resources should be focused where there is the most potential for success.</td>
<td>This step uses outputs from step 1 and provides the foundation for step 3. Engagement with others (step 7) is already occurring, and the participation of women and men in the community provides an opportunity to reflect on how change will happen at the household level— step 6.</td>
</tr>
<tr>
<td><strong>Step 3: Gendered Market Mapping</strong></td>
<td>A comprehensive visual representation of the value chain, market services and the market environment is the concrete output of this step; identifying women’s participation, access and barriers throughout the visual map. The map shows market dynamics, opportunities and barriers for women, as well as potential stakeholders who help or hinder women’s leadership.</td>
<td>Previous steps provide information about conditions in the communities and household, and also set the stage for step 3. Focusing on the market selected in step 2, this phase considers the conditions in which women and men interact at different levels. The product of this step will serve as a communications tool for engaging others, and also as a tool to identify opportunities for WEL.</td>
</tr>
<tr>
<td><strong>Step 4: Identification of WEL opportunity</strong></td>
<td>The main result of this step is a business idea with the potential for growth, income generation and diversification that includes an understanding of how change will promote women’s economic leadership. This opportunity must be identified as a participatory process, where women can make informed decisions about what opportunities they want to pursue.</td>
<td>Taking advantage of all the information gathered from the previous steps, step 4 provides the business idea for assessment in step 5 and gives inputs for step 6 to better understand the requirements for change.</td>
</tr>
</tbody>
</table>
Step 5: Business plan viable for women

A financially, environmentally and socially sound business proposal is produced in this step with the support of experts, and in collaboration with the beneficiary group. Further business activities are determined within this plan.

Step 6: Influencing positive changes at the household level

Women’s economic empowerment can also lead to increased burden for women. This step facilitates a process for women and men to recognize women’s contributions and opens the space for potential negotiations and changes in power relations between women and men at different levels, primarily the household.

Step 7: Engaging others

Private sector, public sector and civil society actor engagement needs to be actively promoted. Knowing who is willing to support the process is fundamental for leveraging WEL’s success.

Context and Results

The better the conditions and available resources are for delivering the WEL methodology, the more likely it is to be successful. The following is a list of the minimum requirements for WEL:

- Motivated entrepreneur(s) to drive the business initiative forward
- A multidisciplinary team should work together to facilitate the process, including, at least, expertise in gender and business. Expertise in value chains, agronomy and resilience is desirable for rural settings
- Stakeholder commitment to promote better economic roles for women
- Involvement of women and men from the communities.
- A clear business focus is key to ensure sustainability and economic drivers
- Awareness of potential personal risk increase for women [see chapter 3]
- Participation of multiple stakeholders who can bring a diverse set of experiences, skills and, potentially, resources
- A network of business mentors is desirable for supporting the business development

The objective of WEL is to create a new sustainable and growing market actor, or the expansion of an existing business that can showcase women’s ability to demonstrate leadership in economic activities in households, communities and markets.

Working in Urban Settings

WEL was originally designed for work in rural agricultural markets. Oxfam’s experience has shown that the principles outlined in this approach can also be implemented in urban contexts. These include:

- Creating Opportunities for collective action. Women usually have smaller businesses and don’t work together as organized groups, but networks of similar businesses can promote economies of scale and collective learning and support. WEL should facilitate spaces for interaction and learning amongst entrepreneurs with similar businesses, which also contributes to confidence-building and peer support.
- Market systems approach. Businesses in urban settings tend to focus on the services sector, and value chains are not usually the best way to represent the market systems. However, there are always clients and suppliers, market service providers, formal regulations and informal social norms as well as competition, all of which require special attention and mapping out. This allows for a better understanding of the position of these businesses, their competition and projections on potential growth.
- Multidisciplinary approach. Diverse actors should work together to provide economic, professional advisory and social support for women- holistically important in generating sustainable growing businesses led by women.
STEP 1:
SITUATIONAL ASSESSMENT OF MEN AND WOMEN IN COMMUNITIES AND MARKETS

Expertise required for this step:
For this step, gender and development experts are key. They should lead in the implementation of this step and work in collaboration with market specialists and community leaders to be able to understand the economic and social context of the beneficiary groups. Women and men of the community should also be engaged in the process.

Who Leads?
• Gender experts: Key to this step, lead implementation

Who Collaborates?
• Business and Markets specialists: collaborate
• Community leaders: collaborate
• Women and Men of the community: engage

This section includes
• When and why to use step 1
• The household
• Market roles versus household roles
• Getting useful information
• Results of this step

What the reader will achieve:
The reader will have a better understanding of household dynamics in terms of workloads, relationships, and power balances. The reader will also be able to assess how these conditions have an impact on women’s ability to participate in profitable economic activities, and how household dynamics are reflected or not in economic roles in markets where the beneficiary population is present.

How to obtain relevant information is also key to making informed decisions; differences between information gathering methods will also be discussed in this section, providing additional elements for the reader to be able to determine the best set of methods to use to obtain the best information possible.

Review these concepts in the Guide to Key Concepts for Women’s Economic Leadership Programmes
• The Building Blocks (Section 1)
• Household and WEL (Section 2)

Additional resources
• An Approach to Prevent Violence Against Women, Booklet 3 of WEL 2.0 series
• Ending Violence Against Women, an Oxfam Guide
• Rapid Care Analysis Tool
• Survey Research [http://www.socialresearchmethods.net/kb/survey.php]
• How to conduct a focus group
  [http://assessment.aas.duke.edu/documents/How_to_Conduct_a_Focus_Group.pdf]
• Public Participation Situation Assessment
  [http://www.epa.gov/oia/public-participation-guide/Intro/Assessment/index.html]
1.1 WHEN AND WHY TO USE STEP 1

This step should be performed at the outset of any programme that promotes women’s participation in economic activities. Increasing the demands on women’s time through added activities can create negative effects if this is not accompanied by increased access and control over resources and assets— including women’s time. Step one helps assess the social relations, decision-making and access to resources— important to understand prior to any intervention.

According to Oxfam, (2011b, p.2), development programmes should benefit all members in the family, however, power relations influence who benefits and how. Households are not single units, and distribution of benefits within the home differs by age, gender, power and status in the family.

Household dynamics influence access to markets and labour opportunities, as gender roles affect the ability and expectations for women’s and men’s participation in productive and labour markets, as well as their relative access to training services and finance.

Oxfam goals extend beyond women having an income-generating project, and recognize that women’s economic leadership in markets also requires control over income, assets, time, labour and finance. This, in turn, often means redistributing men and women’s use of household resources. To avoid “backlash”, communities need to ensure that household power relations have changed for the long-term, so women can retain control over these resources.

1.2. THE HOUSEHOLD

Households are not uniform or homogeneous, and they function in different ways to fulfil economic, social or care needs. Within households there are four factors that influence women and men’s participation and roles in markets:

- Unpaid productive work
- Unpaid care work
- Attitudes, beliefs and norms about gender roles
- Resources, assets, time and labour

Other external trends and shocks may influence changes in household division of labour.

(More information can be found in section 2 of the Guide to Key Concepts for Women’s Economic Leadership Programmes)
1.3. MARKET ROLES VERSUS HOUSEHOLD ROLES

As women take on new roles in markets, it is important to understand what happens at home. Development practitioners should not assume that women have spare time to invest in new activities. Oxfam describes the process in stages: (Oxfam, 2011b, p.10): first, women reallocate their own time and labour and that of their children to manage household work; then, women can take on new roles; and, when women experience an increase in their market roles, they must renegotiate with male family members about time, labour or assets. The previously described process exists in a space of cooperation, but also of conflict. The negotiating power of each household member determines his or her ability to claim resources and benefits.

Some factors affect negotiating power. There are primarily four factors that affect a woman’s relative negotiating power in a household (Oxfam, 2011b, p.13):

1. Her present or future income.
2. Assets ownership.
3. Knowledge and skills.

These factors should be considered in strategies for change, and may also be important indicators in monitoring and evaluation.

1.4. GATHERING NECESSARY INFORMATION

To be able to implement this step and to inform the strategies to move forward, relevant information needs to be gathered. Different methods can be used to gather the most accurate data possible. This step is not about a rigorous scientific process, but uses available resources to gather quality information. The following table suggests some diverse methods and provides suggestions for their use.

Table 3: Information Gathering Methods for Step 1

<table>
<thead>
<tr>
<th>Method</th>
<th>Advantages</th>
<th>Disadvantages</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey</td>
<td>Information gathered can be quantified, and different variables can be correlated.</td>
<td>Interaction is distant and impersonal- and might affect depth of information gathered.</td>
<td>Surveys should not be the only source of information to be able to confirm findings.</td>
</tr>
<tr>
<td></td>
<td>Trends can be identified and different types of analyses can be performed to collected data.</td>
<td>They can be costly.</td>
<td></td>
</tr>
<tr>
<td>Focus groups</td>
<td>Allow for better interaction and sharing among participants and in-depth exploration of issues.</td>
<td>Quantifiable evidence is almost impossible to gather.</td>
<td>Preferably include participants who don’t know each other. Allocate enough time for participants to become familiar with the process and engage.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a risk that the sample is not representative.</td>
<td></td>
</tr>
<tr>
<td>Case studies</td>
<td>Represent an experience over time, including specific examples of how issues were dealt with.</td>
<td>A case study is not always representative of the population-they can take a long time to show relevant results.</td>
<td>Select several cases. Build trust between researcher and subject to be able to discuss issues in enough depth over time.</td>
</tr>
</tbody>
</table>

Sudden violence outbursts (Nicaragua)

The Oxfam country team in Nicaragua began to implement the WEL methodology with indigenous communities in the Northern Autonomous Atlantic Region of Nicaragua in 2012 with a women’s group producing artisanal chocolate for local consumption. After a few months of business growth, women managing the business had already made significant improvement in their income. During one of the visits to the field, the Oxfam staff was approached by one of the women in the group- seeking support for a situation of violence with her husband, reportedly the result of tensions in the home because she was earning more income. A specialist was brought in to the community to explore the situation further and provide local counselling. The impact on gender power dynamics had not been considered previously, and measures against potential risks had not been planned. A more open interaction with the community provided the opportunity to start the debate and guide discussions and reflections in the community, as part of the WEL efforts. It was important to reconsider step 1, and develop a deeper understanding of the situation of women and men in the community in order to develop strategies to address power imbalances.
1.5. RESULTS OF STEP 1

- A report about the conditions of gender and power dynamics in the households and communities. The report can be brief, depending on the quality and quantity of the information. This report will inform programme design.
- A deeper understanding of the most relevant issues in the community, which changes are needed and how to promote these changes.
- Better informed decision on the most appropriate entry point for WEL – such as through training, launching or scaling up a business initiative, or through a specific service for the community. An economic intervention as a starting point is not always advisable.

STEP 2:

GENDERED MARKET SELECTION

What the reader will achieve:
The reader will be able to understand how to facilitate the process of selecting a market. Understanding how markets operate and how WEL aims for them to change is also part of the experience of implementing this step. Thinking beyond a specific market opportunity or business model is key for this step’s success, so a broader market approach is expected. Working with others is important for carrying out this step.

Expertise required for this step:
Market experts who have a good understanding of the realities of women and men are needed for the identification of trends and potential opportunities within markets. Ideally, the process will be led by an economist with a gender specialization, or alternatively, be co-led by both a markets and a gender expert working together. Stakeholders, including men and women community leaders, beneficiaries, and other market actors interested in the process should also be involved in this step.

Who Leads?
• Market expert or economist

Who Collaborates?
• Gender expert: co-lead or collaborate
• Community leaders, women and men in the community and market actors: engage

This section includes:
• When and why to use step 2
• Participatory process for gendered market selection
• Activities and products that work for women
• Working on urban settings
• Results of step 2

Additional resources
• PMSD Roadmap Step 1: Market System Selection [http://www.pmsroadmap.org/step-1-market-system-selection.html]
• Emergency Market Mapping and Analysis Toolkit [http://emma-toolkit.org/]

Review these concepts in the Guide to Key Concepts for Women’s Economic Leadership Programmes
• Overview of Markets
• What are Markets
• Power in Markets
• Oxfam’s approach to Markets
• Glossary of Definitions
2.1. WHEN AND WHY TO USE STEP 2

Gendered market selection is a critical step in programme design, as it defines the space within which the programme will operate. Choosing the right market has implications for the success of WEL in terms of its potential, as well as in the range of barriers and opportunities for women. (Oxfam, 2011c, p.5-6):

This step can be used at three different moments:

1. **At the stage of programme design**, where it is crucial to invest time and resources in researching markets and products before committing to partners and funding interventions on a specific product.
2. **When stakeholders want to redesign a programme during implementation by changing the product**. Markets are not static, what is viable or ‘works for women’ may require adjustments if market or environmental conditions change dramatically. This might also occur where stakeholders failed to invest the necessary time or resources in the design phase, or as a consequence of low demand for the product, or where there are found to be few benefits for women. Where partners are willing to make a change, this step can be proposed.
3. **Although thorough, this step might need to be repeated**, depending on market evolution. Recapitulations are sometimes needed to arrive at better conclusions.

This step is key because it will help to save resources as it can identify potential barriers and prevent obstacles for the programme implementation by avoiding focusing on value chains that don’t offer appropriate opportunities for women.

2.2. PARTICIPATORY PROCESS FOR GENDERED MARKET SELECTION

In order to make the most strategic and informed choices, the following process is recommended (Oxfam 2011c, p.8-10):

1. Discussion with various stakeholders including government, NGOs, donors and the private sector to gather existing data and research (desk review) on market demand, agronomy, environment, and existing actors for key agricultural products in the locality and population.
2. Assessment of the characteristics of market structure for the products and the potential for smallholder and women’s participation: for example, size and nature of market actors, regulations, and infrastructure needed.
3. Interviews or workshops with stakeholders, partners, and women and men producers to agree on the criteria for selection.
4. Pre-selection of potential products and/or markets based on criteria developed.
5. Market selection workshop with key stakeholders in the regions to make the final selection.
6. Drafting a report that includes analysis by various stakeholders.
2.3. ACTIVITIES AND PRODUCTS THAT WORK FOR WOMEN

Market conditions will have an impact on the development of Women’s Economic Leadership; in order to guarantee the success of WEL, it is important to determine both the existing conditions as well as the potential conditions that can be created as part of the WEL process. The following should be considered:

- Women have power and control over the resources needed for the economic activity.
- Women already have, or can acquire the skills needed for this market opportunity.
- There are opportunities for adding value to an activity or product that result in profit.
- Processing and diversifying the product grants access to new markets.
- Women control their own income.
- Women can participate actively and express themselves.
- The product or service gives women the opportunity to manage their business.
- Where products are related to food production, this can also contribute to food security, potentially resulting in increased incentive for men’s collaboration.

Potential dilemma 1: supporting traditional women’s activities versus encouraging women to move into new, more profitable activities. Women are usually concentrated in product or subsector categories associated with limited profitability and high competition, such as in textile production and, therefore, it might seem natural to want to encourage a change in focus to a subsector with higher profit margins. However, moving women into higher margin product areas can present insurmountable barriers to entry or create a backlash if women are seen to be encroaching on traditional male areas of activity. Although traditional “women’s activities” might present low margins, efforts aimed at organizational strengthening, skill-building, improving negotiating skills, improved scale and increased market access can potentially bring these businesses to scale and achieve meaningful growth.

Potential dilemma 2: there are strategic opportunities for a few “exceptional” women higher up on the opportunity scale versus a less strategic opportunity which is applicable to a collective of women in similar conditions, with similar skills and training. For example, a mixed gender organization in a bulk export commodity market might offer higher income generation, but opportunities are for fewer “exceptional” women, and women face barriers to taking on new roles.

Programmes can consider this dilemma, and choose either, or also work with both options to move focus from the first – an “Incubator for WEL” – to the second option over time (Oxfam, 2011c, p.15).

2.4. RESULTS OF STEP 2

- A specific market space is selected during this step, while remaining mindful of the trade-offs and risks that may be associated with that sector’s selection.
- Collaboration between different stakeholders takes place, merging different perspectives into the process, including the beneficiary population.
- New partnerships and a stronger sense of ownership are also expected.
- A feasibility analysis of suitable value chains for a specific population or area, with identification of increasing demand, opportunities for increased income and value addition.
- An evaluation of benefits and risks of each product or subsector for women, in order to ensure that women are not trapped in low value added activities, or saturated markets with no future.
STEP 3: GENDERED MARKET MAPPING

Expertise required for this step:
Women and men beneficiaries should participate in the gathering of evidence with the support of a value chain expert. The ability to assess contextual barriers using a gender lens is also required. Understanding of policies, markets, regulatory frameworks and social conditions also adds value to the process. It will be important to get as much support from others as possible to gather all relevant information in this step.

What the reader will achieve:
The reader will analyse the market system and its elements, as well as the different implications for women and men to participate in the market. The reader will learn how to gather and display information about the market system, using a gender lens. Interaction with real market actors is key to fully understand the process and how best to use the gendered market map.

Who Leads?
• Value chain specialist

Who Collaborates?
• Women and men beneficiaries: actively participate in evidence gathering
• The Entrepreneur
• Gender expert: expertise on the assessment of context-based barriers
• Policy expert: adds value to the process
• Others: support for information gathering

This section includes
• When and why to use step 3
• Gendered market maps
• Gathering information for a gendered market map
• Benefits and challenges of Gendered Market Mapping
• Results of step 3

Additional resources
• GEM toolkit [http://growsellthrive.org/group/gem-toolkit]
• Emergency Market Mapping and Analysis Toolkit [http://emma-toolkit.org/]

3.1. WHEN AND WHY TO USE STEP 3

For livelihoods programmes within Oxfam, this is an important tool for the identification of market actors and the design of market interventions, taking into account the opportunities and barriers identified in the analysis. The Gendered Market Map includes statistics, conditions and formal and informal norms disaggregated by gender, in order to understand the competing conditions for women in a specific market system. It is also useful for choosing an intervention, or for assessing current business initiatives supported by programmes. It can be performed at the design phase of an intervention, or as an evaluation of current strategies. The map is a useful tool for programme design, for leveraging stakeholder involvement, for communicating findings, and also for guiding implementation.

Organic Tamales (Colombia)

After a few months of operation, the organic tamales initiative of women smallholder farmers in central Colombia had exhausted their growth potential with their initial market segment. They were selling tamales to regular customers every two weeks at a farmers market, but they needed to grow the business and requested support from Oxfam to identify new channels for their product. A rapid analysis of the value chain and the traditional food industry provided additional ideas as to how to diversify their marketing channels to reach different customers through local restaurants and stores. Additional interaction with market actors set the stage for new commercial relationships. Understanding the market competition, as well as the ways that others in the value chain gain access to the products and services that they need is key.
3.2. GENDERED MARKET MAPS

Simply put, a market is a place where people exchange goods and services. Market infrastructure can include things like market stalls, a website and regulations, and includes participation of buyers, sellers, intermediaries and lenders. A market system includes the different points of exchange, diverse actors, service providers and regulations or conditions for trading. The “Gendered Market Map” is a visual representation of this system, as well as interactions and relationships that might not be apparent. The map can be used for analysis and assessment for programme design, as a communications tool, and as a capacity building tool for participants.

Understanding the market system is relevant to any business, since its activities are influenced by the system in which it operates. The gendered market map has three different layers (Oxfam, 2011d, p.4):

1. In the middle, the market chains: producers, traders and retailers exchanging the core products or services. Some positions in the market imply more power, and usually women are concentrated in areas with less power.
2. Below, the market services: production, finance, transport, business development, or others. These services support the value chain and try to improve the performance of the value chain actors. Men and women have different levels of access to these services.
3. Above, the enabling or disabling environment: institutions, regulatory frameworks and standards, formal and informal norms and practices that affect all market players. The market environment affects women and men differently.

It is important to highlight relevant gender disaggregated data on the map or as footnote.
Figure 3: Traditional Market Map
Do women have properties they can use as collateral in loan?

What happens in the domestic economy to make this possible?

How many men and women traders are there? Why?

Do gender, roles attitudes, beliefs and participation affect the participation of women in different places in the chain?

Do consumers recognise women in the supply chain?

Do women have access to safe transportation at the good price when they need it?

Can women read and write or use computer?

Do gender roles and behaviours influence the participation of women in different places in the chain?
3.3. GATHERING INFORMATION FOR DEVELOPING THE GENDERED MARKET MAP

The process for elaborating a Gendered Market Map depends on whether the focus is on a new or existing programme, and whether there is a pre-existing market map available (Oxfam, 2011d, p.6-8):

Table 4: Stages of the Gendered Market Mapping Process

<table>
<thead>
<tr>
<th>Stage</th>
<th>If no market map exists</th>
<th>If a non-gendered market map exists</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify stakeholders</td>
<td>Ensure representation of women</td>
</tr>
<tr>
<td>2</td>
<td>Map market chain</td>
<td>Identify where women are and are not in the market</td>
</tr>
<tr>
<td>3</td>
<td>Identify issues in external environment</td>
<td>Check effect on women</td>
</tr>
<tr>
<td>4</td>
<td>Identify market services</td>
<td>Assess availability to women</td>
</tr>
</tbody>
</table>

Diverse experts need to work together to gather significant information, and also to assess the situation of the market system featuring gender disaggregated information, consolidating findings and sharing with a wider audience. The following table shows the stages in relation to data collection and analysis related to specific activities.

Table 5: Activities of the Gendered Market Mapping Process

<table>
<thead>
<tr>
<th>Activity</th>
<th>Expected activities</th>
</tr>
</thead>
</table>
| 1) Desk Research | • Identify government policies and practices, cultural norms, environmental factors that enable or hinder women smallholders from participation or leadership  
• Identify key market chains for women |
| 2) Value Chain Analysis | • A contractor, potentially external, should perform a Value Chain Analysis. This contractor needs to be gender-aware and also consider the identification of supply chains and local markets  
• Incorporate gender disaggregated data  
• Check for new products and market channels as potential opportunities for women |
| 3) Multi Stakeholder Meeting | • Involve an expert facilitator  
• Involve women  
• Identify gender-sensitive stakeholders  
• Identify roles of market stakeholders  
• Set clear objectives and agree on a future map |
It is important to consider the following recommendations during the market mapping process:

- Identify where women are, and where they are not in this product market. Include percentages of women and men in different parts of the market chain, business services, and percentages of services for women and for men. Identify what policies are favourable or unfavourable for gender equality.
- Ask questions such as why women are underrepresented in certain areas, which market actors are enablers or inhibitors of women’s leadership, what demand trends exist for products or services that women will provide, whether available business services are reaching women or not, and why.
- Talk to different stakeholders in the public sector (government officials, ministries), in the private sector (other businesses, buyers, banks, traders, transporters) and community members (household members, farmers).

### 3.4. Benefits and Challenges of Gendered Market Mapping

Some benefits recognized by Oxfam teams [2011d, p.30] include:

- Identifying where women are located in value chains and their levels of participation
- Helping women develop a vision
- Identifying key actors and relationships in value chains
- Bringing together and establishing relationships between actors, building trust and breaking down misconceptions
- Enabling different actors to understand, revalue, reassess and renegotiate their roles
- Stimulating thinking beyond existing chains helps to identify other opportunities
- Identifying the concentration of profits in the market chain
- Making concise reference to the overall market situation (complements detailed analysis)
- Informing programme design at the outset of the intervention
- Supporting programme evaluation

Some challenges identified by Oxfam teams [2011d, p.31]:

- It can be difficult to incentivize the participation of private sector actors in the development of a complete market map
- Markets are changing constantly, and these changes are hard to capture without redrawing the complete map
- Trends are not easy to represent
- Information and valid statistics can be difficult to find
- Collaboration among entities with different goals and agendas adds complexity to joint sessions, i.e., a multi stakeholder group involving private sector, government, NGO actors and women entrepreneurs or smallholders
- It is challenging to represent and include barriers not related to market dynamics
- It is important to engage women (and men) in the process of mapping, as well as to include disaggregated data on trends in women’s participation, and update this continuously
- Backlash by traditional market powers to any multi stakeholder efforts that give traditionally marginalized populations more power in markets
3.5. The Entrepreneur and the Gendered Market Map

The Entrepreneur, a key element of the process, should also be involved in the information gathering process and analyses and discussions derived from that information that occur in step 3. She or he will need to understand the realities of the market that has been selected. This process will also help the entrepreneur to identify key actors and determine specific action points for the benefit of the economic initiative that the entrepreneur will be leading.

3.6. Results of Step 3

- A graphic representation of the market system including the market chain, services and the market environment. It also presents the different implications for women and men in the system, highlighting differentiated concentration, positions, barriers and opportunities for women and men in relation to relevant actors and along the value chain.
- A better understanding of who is willing to support the initiative and who might block it. Change strategies should be formulated after completing this step, with clear roles for each involved stakeholder.
- Inefficiencies, gaps and unsatisfied needs will be extracted from this step.

Step 4: Identification of the WEL Opportunity

Expertise required for this step:
Business experts along with women and men beneficiaries are the key leaders of this step. Other stakeholders can also support it, but it is the business expertise combined with a gender analysis that identifies the market opportunity in conjunction with women and men participants.

Who Leads?
• Business expert

Who Collaborates?
• Women and men involved in the initiative
• The Entrepreneur
• Other stakeholders: support the process

This section includes
• When and why to use step 4
• What a WEL opportunity is and how to foster its success
• Finding opportunities
• Barriers and strategies
• Results of step 4

What the reader will achieve:
Once completed, this section will lead to the development of an initial understanding of how to identify new opportunities. It will not give you all of the answers, but will provide a starting point and a potential roadmap for moving forward while looking for a WEL opportunity. Practice will make it easier each time, keeping in mind that this search is a collaborative process among the implementation team, other stakeholders and most importantly-the beneficiary population.

Review these concepts in the Guide to Key Concepts for Women’s Economic Leadership Programmes
• Overview of Markets
• What are Markets
• Power in Markets
• Oxfam’s Approach to Markets
• Also check the Glossary Section
4.1. When and Why to Use Step 4

This step provides a path for generating different options and selecting the most suitable one given the context. It is a participatory process that takes into account different variables and information gathered previously, as well as the perspectives of people involved.

This step occurs after completion of the Gendered Market Map and is, in fact, a further analysis of the map and an exploration of opportunities within it.

4.2. What a WEL Opportunity is and How to Foster its Success

A WEL opportunity is a market opportunity for generating profit through an economic activity that also leads to better positions for women. Projects focused on the development of economic activities should aim to maximize the economic potential of the business, and also the potential to transform the position of women in markets.

According to Oxfam (2011g, p.4), a market opportunity is a model for generating income either by delivering products or services within the selected value chain, or for supporting it. Oxfam’s hypothesis is that programmes are most successful in achieving women’s economic leadership and overcoming the barriers women face at all levels when there is a “driver” for a market opportunity that helps convince producer organizations, families (husbands), buyers and other actors to work to overcome barriers that women face.

The best opportunities for WEL are where the strategies include overcoming bottlenecks in the value chain, and especially when a change towards gender justice is also a clear value chain improvement. It is important that the opportunity represent an upgrade in the value chain- including new positions or roles with more benefits and fewer risks for women.

4.3. Finding Opportunities

The gendered market map is a very important tool for understanding how the market system works. It also helps identify different positions and new market roles for women. Usually, programmes focus on improvements in production, leaving women performing their traditional market roles, while marginally increasing their income through increased production and trade. WEL opportunities should consider all possibilities, while also exploring new opportunities. Some areas of the market system where potential opportunities can be found include (Oxfam, 2011g, p.8):

Additional resources
• **In production**—improving quality and quantity, and improving the terms of trade within the value chain through formal negotiations.
• **For new products**—new value chain development.
• **In processing**—where additional steps in the transformation of goods and services can be incorporated to increase production value, and attain higher profits.
• **In by-products or new marketing channels**, taking advantage of secondary products and opening new channels to deliver these to new segments of the market, where there is little or no competition.
• **In marketing or direct consumer sales**, giving women the opportunity to trade and negotiate better prices with the final consumer.
• **In a business service for the market**, such as quality control support, or others, that may not necessarily be a direct part of the value chain, but can generate revenue and improve the performance of the chain.
• **In new input supply**, such as innovations in materials, tools, technologies or inputs required by the value chain, and that women can supply.

While exploring these sections of the gendered market map, brainstorming sessions will help generate a diverse set of ideas. As mentioned in step two, the reader must keep in mind that, during the identification of the best WEL opportunity, tensions will be present (Oxfam, 2011e, p.10):

1. Should the initiative start with a "realistic entry point", with smaller, incremental changes to what is already happening on the ground? This might provide a good opportunity for women to improve on their overall management and business skills, and slowly obtain better market positions and roles. This approach will not necessarily bring women out of traditional roles, but it can support the confidence and skill-building required for the risk of managing a business.
2. Should the initiative aim for a new ambitious market position, where women control a whole section of the value chain such as an export leader within a mixed cooperative? This goal might be deemed too ambitious as a starting point, however would imply greater change in market dynamics.

The WEL opportunity should develop a clear path showing how the first type of option can eventually grow and evolve into the second. A clear strategy for this transition is needed for the WEL opportunity to achieve changes at different levels.

The opportunity should respond to the following concerns in order to be integral and present a high potential, should prove to be the best alternative and have clear drivers (Oxfam, 2011g, p.11):

1. Show good market analysis (demand, price, competitors, costs, trends)
2. Show its importance for market development
3. Show how it leads to women’s economic leadership and women’s adaptive capacity
4. Why and how it is compelling to other actors
5. Who the allies, investors and promoters will be
6. Women’s motivation to do it

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**Seedling production and organic fertilizer (Guatemala)**

In the highlands of Guatemala, Oxfam has been supporting a long-term commercial and development alliance between several smallholder producer organizations and an international frozen vegetable exporter. One of the organizations is a women’s organization, originally formed to solve social issues and with no real business orientation. As part of this alliance, their new role in the market was to produce seedlings for vegetable production. At first, other members of the alliance didn’t feel comfortable buying the seedlings from them, given that women had not traditionally carried out this activity. At the same time, selling the seedlings was not an interesting enough activity for other producers, so resistance lessened, and women delivered the service. Once they started delivering, other buyers from outside the alliance started buying from them. With a steady learning curve and dealing with managerial and organizational concerns, women have started to position themselves in the market and diversify their client base.

**Diary franchising (Haiti)**

While looking for alternatives for women’s involvement and leadership in an economic activity, awareness of local social norms and explicit interest in promoting women’s economic empowerment are key. The dairy franchising model used in Haiti considered women’s involvement as dairy plant personnel, and also as milk producers, suppliers of the plants. After almost three years of promoting this model, during an evaluation in 2011, women were no longer members of the milk producing groups and therefore they were no longer part of the beneficiaries of the milk value chain. Their only involvement was in the cleaning process of the glass bottles and some other minor roles within the plant. In Haiti, women are not expected to own large species such as cows, only small ones like goats. Even though women received cows at the beginning of the project, due to strong gender roles and traditions, ownership was gradually transferred to men.
4.4. BARRIERS AND STRATEGIES

Once the WEL opportunities are identified, it is important to assess the barriers to this opportunity, and propose strategies to overcome these barriers. These may affect markets, businesses, communities and households. The information gathered in the gendered market map will support this analysis. It is likely that some changes in the market system, household or the community will be needed in parallel. The implementation team and stakeholders involved must take part in this process.

4.5. THE ENTREPRENEUR AND THE IDENTIFICATION OF THE WEL OPPORTUNITY

The entrepreneur needs to be aware of the different challenges the company will face in pursuing any opportunity. The participation of the entrepreneur in the identification of the WEL opportunity will be key for the enterprise to succeed. A thorough analysis of all options and a deep understanding of the market and the women’s economic leadership potential will aid in his or her vision as to how to lead the enterprise beyond breakeven.

4.6. RESULTS OF STEP 4

- Analysis of the market, including interactions among stakeholders for engagement in the process towards finding new opportunities to generate revenue, and also facilitate transformational changes in women’s lives.
- One or more WEL business or market opportunities are available for further assessment; these opportunities fit criteria regarding growth and potential for women’s economic leadership.
- A list of identified barriers pertinent to the WEL opportunity and an initial set of strategies to overcome these barriers.

STEP 5:
A BUSINESS PLAN THAT IS VAILABLE FOR WOMEN

What the reader will achieve:

The reader will get an overview of the rapid feasibility study process, which evaluates different potential outcomes for the WEL opportunity, and will be able to understand the difference between a feasibility study and a business plan. Both require further reading in order to be able to implement them, and expert support is advised for this step.

Expertise required for this step:
This step requires business experts with skill in proposal development, as well as women and men beneficiaries for providing inputs and making decisions during the design period.

Who Leads?
- Business experts: lead proposal development

Who Collaborates?
- Women and men of the community: engaged in the process, provide inputs and make decisions
- The Entrepreneur

This section includes
- When and why to use step 5
- What is a business in the context of WEL
- Starting or growing a business
- Recommendations for business plan development
- Results of step 5
5.1. WHEN AND WHY TO USE STEP 5

Step 5 should only start once steps 3 and 4 have been completed.

To be able to start and run a successful business, different variables and factors need to be considered. A business plan is a tool that outlines the strategy to follow to reach the identified business goals. It facilitates clear communication within organizations, and outlines a path to follow to reach the goals. It can also be leveraged to engage others, such as investors.

A business plan should be informed by feasibility studies, and based on a clear understanding of the alternative options. A robust business plan will display a clear start up process and strategy, and is also the main document for supporting requests for financial support. A business plan should be developed for the start up of a new business, or for revision of an existing business strategy to promote growth.

5.2. WHAT IS A BUSINESS IN THE CONTEXT OF WEL

An inherent characteristic of business is the generation of income through sales of products and services. Businesses also generate impacts where they operate, and through their interactions with people, other businesses, institutions and the environment. They can influence changes in communities and markets that may have a direct impact in the lives of women and children, given the appropriate conditions.

Therefore, a business within the context of WEL...

• ...should generate sustainable financial returns
• ...should consider environmental impact
• ...should be developed in a participatory manner
• ... should consider women’s perspectives in its design and operation
• ...should create income generation opportunities for women
• ...should promote changes at different levels
• ...should always be based on the results of a feasibility study

5.3. STARTING OR GROWING A BUSINESS

Understanding the current situation, context and existing conditions are prerequisites to starting or growing a business. Opportunities and threats need to be identified and appropriate strategies need to be developed.

In the following lines, the feasibility study process and the business plan are outlined.

5.3.1. Feasibility Study Process

The financial, social and environmental feasibility of an initiative can be assessed through a feasibility study. A feasibility study will also result in a better understanding of the required systems, equipment and personnel, and how to obtain these. This process can be divided in three phases:

1) Preparing the study. This stage gathers information about the people and stakeholders involved in the business and their background, and gives rise to the specific feasibility criteria. The criteria will set the determine if the proposal is feasible or not. These criteria might include social, financial, operational, market and environmental indicators, and any others that the team considers relevant. Budgets are required at this stage for carrying out the study.
Local store (Colombia)

Business plans are the written expression of a strategy. They present expected goals and a way to achieve those goals. In the south western region of Colombia called Patugo, Oxfam was supporting a community of dairy producers. As a result of changes in the collection and transportation of milk, the provision of local staples was affected, and a market opportunity became evident. External consultants used the WEL methodology and participatory processes to develop a business plan for a store. Before starting the new business, the group, in collaboration with the local WEL expert, decided to review the investment required and, after confirming that the working capital needed was about 50% of what was originally projected, the business plan was immediately modified. This participatory process and the use of the business plan as a strategic tool contributed to the success of the start up. After four months of operations, the small store started generating profits.

Dairy products (Haiti)

Enterprises today are no longer focused solely on generating profits. Other social, environmental outcomes beyond economic ones are also expected. Even though companies have a diverse set of interests, the link to financial viability and profit generation is paramount, since this is an essential condition for operational continuity. In Haiti, a franchising company was being led by an NGO with expertise in animal husbandry. During the evaluation of the project in 2011, the marketing specialist wanted to reduce the price of the sterilised milk in order to sell more, providing better nutrition to more people; and purchase more, creating a bigger market for their smallholder producers. This decision needed a cost analysis, showing that it would be profitable and that the total revenue, after deducting variable costs, would be more or at least the same as it was at the moment. In reality, no cost analysis had been done and, after collecting the information to determine the unitary costs, even with a significant increase in sales, the current profit could not be matched. A clear and thorough business plan can help identify the products or services on which to focus, and what strategies to use in order to grow the business. A profitable business has the flexibility to respond to social, environmental and economic needs of the community versus one that is losing money and likely to fail.

2) Performing the study. All aspects of the products or services, operations, suppliers, markets, competition, social and environmental impacts, financial model and risk management are studied and evaluated at this stage. The result is a comprehensive document including different variables to work with, and their estimated levels of certainty.

3) Study Completion. In this last stage, different alternatives are evaluated, depending on the variables used in the second stage. Developing the most likely scenario is recommended, including the worstcase and best case scenarios. Break even points should be identified and inform the construction of the business plan- indicating where the initiative no longer proves viable. This should be included in the formal presentation of achievable commitments to financial partners.

5.3.2. Business Plan

The main goal of a business plan is to inform the decision-making team of a company, and it is the result of a research and reflection process that, in itself, is useful for better understanding the business and the market in which it operates or will operate. The business plan also needs to demonstrate the market potential as well as the financial and operational viability of the business. Financial projections and an investment plan should be included, especially if the business plan will be used to seek support from financial service providers. While the main focus is on financial returns, the business plan also includes concrete and measurable social, political and environmental outcomes.

It is key that the decision-making team- in this case women and men from the communities- participate in all stages of the business plan development in order to own it and understand its relevance. The business plan is dynamic and should be revisited and changed as needed whenever conditions change.

The structure of a business plan will depend largely on the needs of the business and the end-users of the business plan, and can also be shaped according to requirements of financial service providers to better communicate the ideas. However, it usually includes the following sections:

1) Cover page, table of contents and executive summary- including a statement of interest if applying for financing, and a brief overview of the plan’s contents
2) Business description- including the product or service, the business model and value proposition
3) Business environment analysis- the regulatory framework, market trends, technology and other elements of the business environment
4) Industry, competition and market analysis- the historical behaviour of the industry, a review of competitors as well as an analysis of the market niche to be served
5) Marketing plan- prices, places, products and promotions, and how to position the company in the market
6) Operations plan- including equipment, facilities and processes needed for functioning
7) Management summary - the proposed structure for company human resources and lines of reporting
8) Financial plan - projected cash flow, investments, recurrent expenses, projected sales, growth and repayment of debt. This outlines budget, investment plan, financial needs and sources of financing
9) Social and environmental impacts - as additional expected outcomes, and the ways of measuring these
10) Milestones and other attachments - can be included

As mentioned before, how these sections are structured and the depth of the information to include depends upon the expected audience of the business plan.

5.4. RECOMMENDATIONS FOR BUSINESS PLAN DEVELOPMENT

Extra effort and important information is needed in order to both develop and assess a business plan using a gender perspective. Some considerations include:

- Disaggregated data by gender (statistical data, education, employment, demographic and other variables).
- A linking of general market trends to traditional attitudes, beliefs, values and behaviours in households and communities that are reflected in the market.
- Definition of the potential client base, how this might differ by gender.
- Employment of different research and data collection techniques, according to differences in needs and interests of men and women in the community.
- An analysis of practices and policies that facilitate or block the participation of women in the economy, either as employees or as business owners.
- Go beyond the assumption that merely including women’s participation is adding a gender perspective.
- Ensure that gender-specific language is used (women producers, women entrepreneurs, women and men suppliers, etc.) to make visible women’s participation in the business, and to avoid the assumption that the terms ‘collective’ or ‘group’ automatically include women.
- Demystify the belief that including women and gender differences is damaging to men.
- When looking for suppliers and distribution channels, make sure to have an intentional focus on women-led businesses in order to connect and develop women-led initiatives.
- When selecting business partners or allies, make sure that they are committed to gender-equitable policies and practices.

5.5. THE ENTREPRENEUR AND THE BUSINESS PLAN

The business plan development process includes a series of informed decisions that will dictate potential success or failure of the enterprise. Consultants or external people cannot make these decision alone, consensus with the entrepreneur and the main stakeholders is needed in order for the plan to be truly owned by the ones who will be leading it, and will be primarily affected by the performance of the enterprise. As stated before, the business plan will be an important communication tool and, through the implementation, revision and adjustment of this tool, the entrepreneur and internal stakeholders will be able to make business decisions and understand the impact of those decisions.

As a tool, the business plan also has its limitations, and there will be occasions when the enterprise will have to rely on the expertise and vision of the entrepreneur in order to quickly adapt to changes or to rapidly take advantage of opportunities.
STEP 6: SUPPORTING POSITIVE CHANGES AT THE HOUSEHOLD LEVEL

What the reader will achieve:

This section will help the reader analyze the relationship and dynamics between households, community, markets, as well as increase understanding of the overall barriers and opportunities for women stemming from household dynamics and relationships. The reader will have an increased awareness about the potential risks associated with economic empowerment activities, and what can be done to reduce these risks for women. Leveraging collaborative efforts with other experts will enhance the impact of this step during the intervention. Oxfam is currently developing an additional practical tool for the identification of areas for negotiation in the household [Rapid Assessment Tools for Household, draft documents, 2013], and readers should consult these for more in-depth practical guidance.

Expertise required for this step:

Project beneficiaries should lead strategies for changes at the household level, utilizing support from experts. Gender experts can lead in capacity development processes and discussions about the benefits and challenges of household level changes, and guide beneficiaries in identifying best strategies for changes at the household level.

Who Leads?

- Gender experts: lead in collaboration with WEL stakeholders

Who Collaborates?

- Women and men beneficiaries: share experiences and validate approaches and priorities

This section includes

- When and why to use step 6
- Dimensions of household and negotiating power
- Changes at the household level and relationship to business
- Unplanned outcomes
- Results of step 6

Additional resources

- An Approach to Prevent Violence Against Women, Booklet 3 of WEL 2.0 series

Before you start- Review these key concepts:

- An Approach to Prevention of Violence Against Women in the context of Women’s Economic Leadership Programs
- Care in Households and Communities: Background Paper on Conceptual Issues (Oxfam 2013 unpublished paper)
- The Guide to Key Concepts for Women’s Economic Leadership Programmes
6.1. WHEN AND WHY TO USE STEP 6

For women to participate fully in markets they often must overcome barriers at home, meaning that the household should also be a focus of any WEL intervention. Step six aims to focus on how the complex dynamics between women and men in households and communities are linked to market participation and to the economic leadership of women. It analyses how these dynamics impact women's ability to actively participate in the economy under equal conditions, and also aims to influence changes that improve women's ability to exercise their economic rights, as well as prepare them for potential resulting risks.

Step six is expected to be implemented as a process throughout the entire programme design and implementation- and all stakeholders should also have a role in influencing changes at the household level.

6.2. DIMENSIONS OF A HOUSEHOLD AND NEGOTIATING POWER

Some specific questions that should be answered in order to move forward on influencing household level changes (Oxfam, 2011f, p.4) include:

- What are the key changes needed at the household level in order for women to become leaders in this specific market or enterprise?
- How do women and men believe that this change can happen?
- In the long-term, what is required for women to maintain and build on these positive changes?

6.3. CHANGES AT THE HOUSEHOLD LEVEL AND ITS RELATIONSHIP TO BUSINESS

It is important to understand the implications of the household dynamics on the business, as well as the implications of the business on household dynamics. Below is a suggested process for influencing changes at the household level. This process links the needs related to the economic opportunity to the changes needed in the household for women to actually achieve economic leadership, and focuses on changing the situation at home to foster women’s active role in the business initiative.

The proposed process includes participation of other actors—especially women and men community members. The step leads to short term strategies for affecting household dynamics to sustain strategic participation of women, in conjunction with other actors.

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**Cooking courses (Colombia)**

In most parts of the world traditional gender roles are very difficult to change. However they are changing in some indigenous communities of the Cauca Valley in Colombia. As part of the capacity building processes for the community that is improving their milk production practices and technology, men and women members of the community received trainings that included cooking. A leader of the women’s group reported to Oxfam during a visit in 2012 that, after her husband attended the training, he immediately fell in love with being a cook, and that she has never cooked again, since her husband prefers to do it himself. When men and women are given the opportunity to explore other roles, as well as a non-threatening space to reflect on these roles, positive changes can emerge which improve the lives of women, men and children.
Psychological support (Colombia)

After a process of analysis with beneficiaries of a WEL project in Colombia, the Oxfam implementation team brought a psychologist on board, as a result of reported cases of violence and abuse in the community. The psychologist assesses family situations and provides counselling, as well as assessing community attitudes (monitoring resistance) toward the empowerment of women. It is important to remember that each context is different, and that available resources and local priorities need to be matched in order to maximize effectiveness of the intervention.

New masculinities (Honduras)

Changes in values, attitudes, beliefs and behaviours usually take time and require consistent efforts in order to be effective in changing gender roles. In Honduras, NGOs have been working with communities for several years. In a specific community called Belen, Oxfam’s partner has been providing training on gender to the community for over a decade. When talking to the community members in 2012, one of the older women participating expressed that her husband had gradually changed over time, due to her negotiation and the gender awareness training. Her husband now understood that he could be responsible for some activities and share the household workload. Changes at the household level take time and effort; external actors can only guide these changes, which will occur when the community is ready.

Self-esteem and spouse’s perception (Haiti)

When trying to promote changes at any level, the drivers for the specific intended change need to be identified. Improving the income generation power of someone can be a meaningful driver. In Haiti, a beneficiary of a WEL urban project in Croix des Bouquets, who had been experiencing violence in the home, expressed that because of her increased earning potential and role as income generator, her husband treated her completely differently. The relationship was improved by her new role, and her voice and opinion were relevant when making family decisions. In this particular case, an increased income improved the situation and diminished a situation of violence. It is important to note that, although there is no guarantee of this being an impact of increased women’s economic empowerment, it may also be the outcome. Support and monitoring are needed at the local level.

A. Prioritizing resources: What resources are critical for women’s economic leadership and how is access to these determined by household dynamics and roles?

- What resources such as skills, knowledge, time and assets are required for women’s success in this new market role?
- How is women’s access and control over these resources affected by household dynamics?
- What is the likelihood that significant changes can be achieved during the project life?
- Which resources are meaningful, compelling, and significant for many women in his community?

How to do this: Meeting with women beneficiaries and stakeholders

B. Determine the change needed: Identify ways to promote change in order to achieve women’s control over these resources.

- How can positive changes be promoted for women’s access and control over this resource? What are the specific changes?
- Think from various perspectives, be as specific as possible
- Prioritize: focus on what can be done within the scope of the programme, as well as long- term and short-term.

How to do this: Small group discussions to think through questions

C. Design strategies to effect change, along with current or potential allies.

- Consider gendered market map environment, market service providers, as well as market actors or communities
- Which actors can be a part of change? Which have a significant influence?
- Which actors will be allies or blockers?
- What kind of power are we addressing that maintains the status quo? Is it visible, hidden, invisible? What kind of power does each of these actors have?

How to do this: Community meeting to discuss and confirm with men and women smallholders

D. Long term change: How will these women increase their negotiating power in households over the long-term to secure women’s economic leadership?

- This is ambitious. Can focus on analysing how women’s new roles in economic leadership can be sustainable at household level. What will get in the way? What kind of backlash might happen?

How to do this: focus group discussion with women only

It is important to note that current piloting of specific tools by Oxfam practitioners that focus on care analysis will aid in refining the instructions for this step, and accompanying documentation should be consulted (see Oxfam 2013f).
6.4. UNPLANNED OUTCOMES

The previous section dealt with defining a strategy and potential allies to free up the most significant resources for women to properly engage in the WEL opportunity. The process aims to identify specific and achievable changes within a project’s scope. Women need to be able to engage with the initiative fully in order to build and sustain a profitable business. At the same time, it is often necessary for women to demonstrate their potential for generating additional income in order to attain increased negotiation power at the household level.

WEL works under the hypothesis that a main driver for change in the process is an economic driver, or increased income through women’s economic engagement. This can bring several opportunities to renegotiate roles and responsibilities at the household level and improve women’s position on different levels, but, as mentioned previously, a potential “backlash” can occur as a result of resistance and the desire to maintain the status quo.

Through economic empowerment, or even through increased exposure in markets and business, women can face an increased risk of violence. It is fundamental that the programme consider the potential for this increased risk and plan to deal with it prior to the intervention. Engagement of specific partners in the process and allocation of resources to prevent and deal with gender-based violence are responsible measures when promoting changes in the power relations between men and women in markets, communities and households. Creating support networks, and identifying ways to get support from other actors in the territory are also important when resources are scarce. Peer-to-peer exchanges and the consolidation of women’s support networks can be powerful sources of assistance when experiencing a personal situation related to violence.

For additional information and tools for dealing with gender-based violence and the potential adverse impact of development programmes, please refer to Chapter 3.

6.5. RESULTS OF STEP 6

• Identification of resources needed for women’s economic leadership, and how to change access and control over them for women
• Identification of strategies and allies for affecting change at a household level, within the scope of the project
• Contributions to long-term changes as part of programme activities
• Clear commitment and plan to prevent and deal with increased personal risk for women
STEP 7:
ENGAGING OTHERS

What the reader will achieve:
The reader will have a greater understanding of how to identify new actors relevant to the programme, as well as what different strategies are needed for their engagement. Tips will be given for preparing and managing conversations with other actors, focusing on constructing long-term relationships. Practice is the best way to develop the skills to engage others in the programme, but a roadmap of whom to talk to and how can guide the process.

Expertise required for this step:
All of the collaborating organizations that are working together in the WEL process will have different roles and will bring specific expertise. The greater the levels of engagement of other actors, the more likely the initiative will be successful.

Who Leads?
- Oxfam staff and principal partners, as part of implementation plan for WEL process

This section includes
- When and why to use step 7
- Who to engage and how
- Results of step 7

Additional resources
- PMSD Roadmap Step 5: Engaging key actors
  (http://www.pmsroadmap.org/step-5-engageing-key-actors.html)

7.1. WHEN AND WHY TO USE STEP 7

Oxfam’s role in WEL implementation is one of facilitation, engaging others in order for programmes to be successful. Important resources can be leveraged through engaging other stakeholders, and this engagement has the potential to enhance success for WEL and foster its sustainability.

The step focusing on engagement with others is intended to highlight the importance of relationships and collaboration for the development of new knowledge, and also to bring a diverse set of backgrounds and expertise to the process. It is also meant to raise awareness of the importance of supporting women’s economic empowerment and leadership, and understanding that this is a complex but important process.

Step seven is expected to happen at the outset of the methodology, as well as during the entire process. Relationships aren’t built quickly, so a process that exists during the life of the project is needed to keep others engaged.

Review these concepts in the glossary of the Guide to Key Concepts for Women’s Economic Leadership Programmes
- Stakeholder map
- Partnerships
- Private Sector
- Public Sector

Women in Small Enterprise programme (Guatemala)
As a result of organizational learning, research efforts and collaboration, a new programme began in Guatemala in 2013 to support the development and growth of women entrepreneurship. This project brings together actors from different sectors to provide financial services, business skill training and support on social issues to women entrepreneurs seeking to grow their existing businesses. The project aims to leverage an ecosystem of support for these women, with the actors all assuming diverse and complimentary roles and responsibilities, pushing for the same goal.
7.2. WHO TO ENGAGE AND HOW

Organizations now understand that changes can’t happen with isolated efforts, so working as groups of actors in a territory is more effective. It’s important to identify all relevant actors for the programme, including less obvious ones, such as religious leaders or husbands. One-to-one meetings are critical for the process, but at one point it might be necessary to put various groups in one room to agree on a joint strategy.

Oxfam varies in its type and level of engagement with the public and private sector (2011g, p22), ranging from campaigns against their practices, to the development of new products, services or projects and partnerships. The following list includes key actors with whom the reader should already be engaging (2011g, p.23):

- Producer enterprise
- Women farmers
- Buyers
- Service providers
- Community and religious leaders, radio
- Local authorities
- Husbands
- Women’s groups and networks

The specific individuals to bring into the planning will come both from pre-existing programme experience and contacts, as well as through the process of gathering market information for the gendered market map. It will be important to understand what organizations, or who within those organizations are interested in working with the programme, their level of interest and whether they are likely to serve as facilitators or disruptors to the success of the initiative. As facilitators, similar agendas between actors that are relevant to the project might be identified; bringing those actors together is also a good strategy to engage them more actively in the programme.

A stakeholder map should be under construction at the outset of the programme that classifies stakeholders on:

- Their level of resources and influence
- Level of interest in the programme
- If they are an ally or a blocker

Priority for engagement should be given to those with high levels of influence and high interest (allies), as well as the potential blockers. The allies can be actively engaging with the programme, while a strategy can be developed, if feasible, to reduce the influence of the blockers, or turn them into allies, when possible.

Challenges can be encountered when promoting gender equality, as there is often a lack of awareness of the issues and the will to tackle them. Different approaches should be used when trying to start such conversations, or when trying to get support.

Alpina Foundation (Colombia)

Information gathered by Oxfam emphasizing the importance of women’s participation in the dairy value chain was shared with the Alpina Foundation, linked to one of the most important dairy companies in the country. This information led the foundation to join forces with Oxfam to fund a women’s economic leadership process. For each dollar that Oxfam gave, the Alpina Foundation matched funds for the WEL project.

Tip:

Some common problems faced by practitioners in engaging in new types of partnerships (such as with the private sector) are caused by lack of experience, by organizational culture, or personal bias. It is important that an open-minded attitude be adopted and a constructive conversation style be used while interacting with new actors and trying to develop a relationship. For building a relationship, it is important to use open-ended questions, and to understand the priorities and motivations of the other actor. Pre-defined questions, for example, are less effective than open ended ones in building a relationship for collaboration, and are usually focused on our own interests.

Frozen vegetable export value chain (Guatemala)

A large company that trades frozen vegetables with strong commercial links in the Guatemala export value chain agreed to collaborate with Oxfam and other actors in Guatemala in order to create a long term relationship with smallholder producer organizations and local exporters. Continuous engagement among actors, led by Oxfam staff, fostered these relationships. Despite lack of budget for alliance-building activities, each actor found ways to engage and keep the alliance active. After four years of operations, smallholder producer organizations are now working in collaboration with local NGOs and their commercial partners to supply the value chain, and their activities are already diversifying to other commercial actors in the area. The relationship development was a fundamental part of the process, seen in the strong commitment by stakeholders in the long-term vision.
When discussing gender issues, women or gender equality with new and non-traditional allies and partners, responses may often be (Oxfam, 2011e, p.6):

- Superficial or general
- Telling us what they think we want to hear
- Anecdotes that “tick the gender-equality box”
- “Not me” attitude, other actors should answer, others have responsibility for women’s involvement
- The question isn’t understood or is considered disconnected from the business model

This is why conversations with different or new actors should not focus on our interest and priorities, but on getting to know the other person and, thus, help us gather better evidence (Oxfam, 2011e, p.8):

- Understand their business operations
- Understand their priorities and concerns; are they focused on profits, quality, and scale, assured supply, environment or sustainability, among others.
- Ask questions about “women” in the context of their priorities
- Locate “changes for women” in the logic of addressing a business or market problem together

It is important to link women’s engagement or active participation with evidence of attaining better results for the markets or the businesses. These arguments will help us enter further conversations with stakeholders and, later on, we can provide them with additional arguments regarding rights and gender justice.

It will be important to propose smaller changes first, to help build trust, and to have a set of guided questions for others to arrive at the same conclusions without telling them what to do.

7.3. RESULTS OF STEP 7

- Stakeholder map and strategies to deal with each type of stakeholder
- Prioritizing engagement according to available resources
- Better understanding of how to engage with others
Oxfam criteria and indicators for assessing impact on gender equality (2002):

- **Women and men participate in decision-making in private and public more equally**
  - Do women enjoy greater participation in the political processes of the community in situations where they were previously disenfranchised?
  - Has the influence of women on decision-making in the project increased in relation to that of their male counterparts?

- **Women have more equal access to, and control over economic and natural resources, and basic social services**
  - Do women share the workload more equally with men and have more time for themselves?
  - Has women’s access to, and control over natural and economic assets [land, household finances, other assets] increased?

- **Fewer women suffer gender-related violence, and women have increased control over their own bodies**
  - Has the project led to a decrease in violence against women, or has it caused or exacerbated violence, or the fear of violence?

- **Gender stereotypes and discriminatory attitudes towards women and girls are challenged and changed**
  - Do men and women better understand how unequal power relations between them discriminate against women and keep them in poverty?

8.1. BASELINES

A baseline study occurs at the outset of any programme or project intervention to measure the situation and the status of individuals, households, communities, markets and institutions. This study provides a description or snapshot of the situation related to the intervention, so that changes to this snapshot can be assessed throughout the intervention, as a part of Monitoring, Evaluation and Learning. A baseline is used to take stock of “the initial value of indicators at or near the beginning of interventions aimed at changing behavioural or systemic characteristics of individuals or systems” [Caldwell, 2001] and compares those same value indicators during and following the intervention. This comparison provides information about changes that are derived, at least in part, by our interventions [UNWFP, 2005]. The baseline is directly linked to a logic model for a project or programme.
8.2. INDICATORS

The basis of any MEL effort is the quality of the information. This information should be linked to key elements of the project where its outputs and outcomes can be identified. Indicators are used to measure the results and impacts of a project and project teams should make an effort to design SMART indicators: specific, measurable, achievable, relevant and time-bound.

These indicators should take into account the differences between women and men, as well as be context-specific implications. They should include various dimensions, such as economic, social and attitudes/beliefs. Selected indicators should be a mix of quantitative and qualitative, and different collecting mechanisms should be used to compare results.

8.3. CHANGES SOUGHT BY WEL PROGRAMMES

Project teams need to be aware that some of the changes proposed by the WEL methodology might need more time than is the planned for the project. The changes might also be influenced by a variety of internal and external factors, and attribution of results might be complex.

Positive results might be related to long-term processes already in place, or linked to context-specific conditions. In order to replicate these conditions and attain results, further resourcing might be needed, through participation of additional actors or the presence of specific pre-conditions.

Changes sought must fall within the general objective of WEL and be aligned with local interests and priorities. The project objectives, as well as the related MEL process should be developed with the participation of partners and the beneficiary population in order to achieve realistic results.

- Is women’s unpaid and caring work better valued? Is greater value attached to girls’ education?
- Women’s organizations are established, strengthened or collaborated with
  - Have more women’s organizations been established or strengthened through the project?
- Women are empowered to act as agents of change through increased self-confidence, leadership skills, and capacity to organize
  - Has women’s self-esteem and self-confidence to influence social processes increased?
  - Are women able to exercise their capacity for leadership?
IMPLEMENTING WEL TRAINING AND CAPACITY DEVELOPMENT

9.1 PRE AND POST WEL

To attain the best possible results, a WEL process should start only if certain conditions are met, or after specific processes have already started. Equally, after the end of a WEL process, certain conditions must be met in order to sustain the changes achieved.

Before WEL

Some considerations for starting a WEL programme:

- **Oxfam country programme.** The people, resources and the way that interdepartmental support happens within a country programme will impact WEL. Different capabilities are needed for the methodology to be thoroughly implemented, and a broad understanding of economic and social issues and opportunities needs to be present. A collaborative environment and a clear focus on women- evidenced in the organization’s vision and staff- will be key contributors to the success of a WEL project.

- **Partners.** Various partners should be considered for leading the different processes required by WEL, especially local organizations with aligned strategies and interests. Local organizations committed to a specific territory, that have diverse capacities and expertise are needed to implement WEL. Transparency of the process, and a shared understanding of each partner’s role and responsibility within the project are fundamental.

- **Beneficiary population.** There is great diversity within communities and beneficiary groups, and not all are good candidates for WEL. A proper assessment of the development needs of a community, and the capacities and needs of the beneficiary group should be performed prior to deciding that WEL will be the best approach. There must be some level of interest already present among women and men of the community to promote women’s economic leadership. Without this, changes will be dramatically slower or unattainable. Leadership support can be a great advantage to obtain buy-in at the household level.

- **Market conditions.** Given that one important element of WEL is the economic performance of the business initiatives, pre-existing market conditions should be favourable. Previous efforts in advocacy should have happened to prepare the ground for inclusive market conditions or new economic developments might present market opportunities that support a WEL process.

An example of WEL Indicators in Asia: Pro-poor Governance, Civil Society and Markets Project (GCSMP)

**Market opportunity:** Resin

**Where:** 4 provinces targeting 20,000 households

**Areas of focus:** resilience, voice and women’s economic leadership

**Indicators include:**
- rules and their enforcement in use of land and forestry resources
- voices of poor women and men measured by their awareness of the rules and mechanisms
- actions they have taken at different levels
- business skills as measured by executive committees set up, getting market information,
- disseminating market information, collective business action/organized actions such as selling, buying, savings.

In all of these, women’s rights in the legalization process, women voicing their own priorities and plans/interests, skills and capacities, organized actions are monitored. Advocacy is carried out in partnership with multi-donor livelihoods facility and national community forestry networks.

Source: East Asia Community of Practice on Women’s Economic Leadership in Agricultural Markets. Focus Question for Learning: How will market-based programmes explicitly facilitate changes for women at the household level? [May to July 2010]. Edited by Alexandra Pura.

http://api.ning.com/files/0D5vN9c7BXsUslyFFEv1mxF6DqDavHqBZnLiYTA-3cih6eZrSYcujiEdtY6ReBkgqW2mGUbt42yskAgarxespdfTvnCTKNxu/FINALREPORT_EAWELCoPMayJuly2010.pdf
After WEL

Once the WEL process has been completed and the project is closed, it is very important to make sure that a clear strategy is in place to ensure the following:

- **Business performance.** Support networks or other types of business development; actors should be brought into the mix or linked to the exiting initiatives in order to ensure their economic performance. The health of the business is critical for promoting sustained changes.

- **Evolution of drivers of change.** As household conditions change, priorities also change. Each individual will respond to new sets of priorities. Potential negative impacts resulting from WEL due to changes in individual or collective priorities should be analysed, and strategies developed in order to minimize risks of resistance and backlash.

- **Scale up.** Evidence of existing success should be systematized and used to promote involvement of additional public sector actors with resources, and private sector actors as well. Highlighting the development benefits of a WEL process and the performance improvements, recognizing and supporting women as economic leaders, additional resources and efforts will be directed towards continued support.

### 9.2. SUGGESTED LEARNING SCHEDULE FOR WEL TRAINING

The following table shows the suggested activities related to the development of a learning process for WEL implementers. It includes preliminary activities, an in-person workshop and follow-up activities.

**Table 6: Map of Technical Support: the WEL Capacity Building Process**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Timing</th>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre-workshop activities</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>Webinar</strong></td>
<td>Map out stakeholders, profile beneficiaries and develop project timelines. Introduction to WEL</td>
<td>3 hours, 6 weeks prior to in-person training</td>
<td>WEL in-country teams</td>
</tr>
<tr>
<td><strong>Webinar</strong></td>
<td>Basic Concept review and overview of Step 1- Situational Assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Homework</strong></td>
<td>1. Situational Assessment</td>
<td>3 to 4 days over a 4-week period. Finished product available prior to WEL training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Gendered market selection process</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Webinar</strong></td>
<td>Review results of homework on steps 1 and 2</td>
<td>2 hours, 1 week prior to in-person WEL training</td>
<td></td>
</tr>
<tr>
<td><strong>In person training</strong></td>
<td>WEL training</td>
<td>5 days</td>
<td>WEL trainers, partners, allies involved and identified</td>
</tr>
<tr>
<td></td>
<td>OUTCOMES</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>- Increased capacity for WEL delivery, evidenced through a participant evaluation of training</td>
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<tr>
<td></td>
<td>- Definition of action plan for measurement in 6 months</td>
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<td></td>
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<tr>
<td></td>
<td>- Maps validated/adjusted and appropriated</td>
<td></td>
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<tr>
<td><strong>Workshop</strong></td>
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</table>
Practitioners make choices on where to most strategically invest time and resources. The hope is that this guide will improve the focus on women and on shifting gender power relations, within the scope of Economic Development and WEL programs.

Recognizing that women producers and entrepreneurs are motors of economic development, that women’s role in food production is increasingly important in developing countries, as well as the fact that economic development initiatives prove to be an effective entry-point for leveraging gender justice, there are clear opportunities for Oxfam to leverage changes in these areas.

Helping women overcome the specific barriers they face individually, in the home, community, market and in society, will contribute to gender equality and gender justice, as well as level the playing field among women and men for their economic and market participation.

As always, rights are at the core of Oxfam’s development initiatives and in WEL, at the forefront is the right of women to participate in economic development—under equal conditions, on equal footing and with equal control over resources and assets.

### CONCLUSION
REFERENCES


APPENDIX

APPENDIX I: FACILITATION GUIDELINES

This document includes a short description of all segments of the WEL Workshop.

**General objective of the workshop**

Develop shared knowledge and understanding of the Women’s Economic Leadership methodology, identify roles and determine gaps and opportunities for implementation by team members. The training will contribute to the development of a gender lens for analysing market opportunities within development programmes.

**Segments**

There are 16 segments, each 90 minutes. The segments could be arranged over 3, 4 or 5 days, as the examples below show. Smaller groups of a minimum of 6 could choose 3 days; larger groups with an absolute maximum of 20 participants should choose 5 days.

### Summary Agenda

<table>
<thead>
<tr>
<th>Seg.</th>
<th>Subject</th>
<th>Expected outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Welcome and overview</td>
<td>• Give an introduction to the workshop and present the agenda&lt;br&gt;• Share workshop rules&lt;br&gt;• Share and adjust expectations</td>
</tr>
<tr>
<td>B</td>
<td>Creating a common ground on gender concepts</td>
<td>• Identify assigned gender roles, their value and impact on the lives of men and women&lt;br&gt;• Create a common knowledge base on gender concepts</td>
</tr>
<tr>
<td>C</td>
<td>Introduction to WEL</td>
<td>• Know the background of WEL&lt;br&gt;• Understand the meaning of Women’s Economic Leadership&lt;br&gt;• Get to know the steps of the WEL methodology and their interrelation&lt;br&gt;• Roles within WEL</td>
</tr>
<tr>
<td>D</td>
<td>Step 1 (Situational Assessment of Men and Women in communities and markets)</td>
<td>• Reflect on previous discussions&lt;br&gt;• Understand personal perceptions of reality and “what should be”&lt;br&gt;• Reflect on different data gathering techniques</td>
</tr>
<tr>
<td>E</td>
<td>Introduction to markets</td>
<td>• Understand market concepts&lt;br&gt;• Understand power in markets&lt;br&gt;• Identify potential markets for the WEL initiative</td>
</tr>
<tr>
<td>Seg.</td>
<td>Subject</td>
<td>Expected outcome</td>
</tr>
<tr>
<td>------</td>
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</tr>
</tbody>
</table>
| E    | Introduction to markets | • Understand market concepts  
• Understand power in markets  
• Identify potential markets for the WEL initiative |
| F    | Step 2 (Gendered market selection) | • Share the Gendered Market Selection process  
• Identify potential criteria  
• Perform one exercise of gendered market selection |
| G    | Market systems | • Analyse interactions within market systems and their implications for women and men  
• Identify market actors, interactions and contexts for each selected market |
| H    | Step 3 (Gendered market mapping) | • Develop a better understanding of the gendered market mapping process  
• Clarify doubts and concerns |
| I    | Maps and opportunities | • Consolidate learning from step 3  
• Discuss an example of how to take advantage of the mapping process for programme design  
• Understand benefits and challenges of the map  
• Start debating how to identify opportunities |
| J    | Step 4 (Identification of WEL opportunities) | • Discuss the characteristics of a WEL opportunity  
• Identify opportunities with a practical example |
| K y L | Step 5 and the feasibility study process | • Give an example of the feasibility study process  
• Experiment with time and resource constraints  
• Obtain a general perception of the activities involved in starting or growing a viable business for women |
| M    | Business planning and promoting changes at home | • Share reflections about the feasibility study process and business plan development  
• Debate recommendations related to promoting changes at the household level |
| N    | Steps 6 (Promoting positive changes at the household level) | • Determine short- and medium-term strategies to deal with changes at the household level  
• Visualize other potential outcomes of these changes and define joint strategies to deal with negative ones |
| O    | Step 7 (Engaging others) | • Identify best practices when interacting with other types of actors  
• Hear examples of success cases in collaborations with the private sector  
• Experiment with and reflect upon a dialogue process |
| P    | Closing remarks | • Close the workshop  
• Reflect and share on the next steps  
• Evaluation of the workshop |
<table>
<thead>
<tr>
<th>Seg.</th>
<th>Subject</th>
<th>Expected output</th>
<th>Proposed Methodology</th>
<th>Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Workshop introduction, agenda and rules</td>
<td>Have a general understanding of why the participants are there. Take a first glance at the agenda. Reach an agreement on workshop rules.</td>
<td>Local organizational staff should provide an introduction to the group and state how this workshop fits within organizational goals. Present slide with the agenda. Present slide with the rules and add rules as necessary.</td>
<td>Slides: [1] agenda and [2] rules. Projection equipment. Name tags.</td>
</tr>
</tbody>
</table>
| A    | Expectations and learning processes | Share expectations. Explore the learning process. | Share in pairs and then in plenary some personal information such as name, city of origin and favourite month of the year. In addition, discuss expectations:  
- What do you expect of this workshop?  
- What do you expect from the other participants?  
- What do you expect to give to the workshop?  
Discuss and take notes on “Meaningful Learning” and explain why only a certain level of “knowledge” will be achieved during the workshop. | Slides: [1] questions about expectations and [2] “learning process”. Projection equipment. Flipchart and markers. |
| B    | Reflections on video “The Impossible Dream” | Explore reactions to a fictional video about gender roles and responsibilities. Debate how this relates to the participants own reality. | Present the video “The impossible dream”. Ask the participants to express their feelings after watching the video. Ask guiding questions to explore issues of assigned gender roles and responsibilities, and bring up the question of justice. | Video “The Impossible Dream” Projection equipment |
| B    | Gender concepts | Read, understand and discuss gender concepts | Share printouts of selected readings:  
- What is gender  
- Equity, equality and gender justice  
- Economic power of women  
- Power relations and decision-making  
- Sexual division of labour  
Discuss in smaller groups and then share as a plenary. | Printouts of selected readings Flipcharts and markers |
<p>| C    | WEL background | Understand the development of WEL in Oxfam and in the region | Share information with the aid of slides. | Slides with background on WEL within Oxfam and in the region Projection equipment |</p>
<table>
<thead>
<tr>
<th>C</th>
<th>What is WEL?</th>
<th>Discuss the meaning of the Women’s Economic Leadership Methodology</th>
<th>Read and discuss the definition of the WEL methodology in small groups and then in a plenary.</th>
<th>Printouts of the definition of WEL</th>
<th>Flipcharts and markers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Obtain an overview of all WEL steps</td>
<td>Give a quick overview of the steps and their interrelations with the supporting slide</td>
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<tr>
<td></td>
<td></td>
<td>Identify basic contextual needs for WEL implementation</td>
<td>Provide general recommendations with the supporting slide</td>
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<td>Consolidate content giving a closing remark for the whole segment</td>
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</tr>
<tr>
<td>D</td>
<td>Perception of gender norms</td>
<td>Understanding our own perception of what should be according to gender norms</td>
<td>Read the story of “Esteia and Miguel” and divide into small groups to prepare scenarios for 1, 5 and 15 years after the event told in the story</td>
<td>Printout of the story of “Estela and Miguel”</td>
<td>Flipcharts and markers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Share scenarios in plenary and reflect upon them. Take note of relevant findings in flipcharts. If possible, share anecdotes of other scenarios in other workshops.</td>
<td></td>
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</tr>
<tr>
<td>D</td>
<td>Situational assessment of women and men</td>
<td>General knowledge of situational assessments of women and men and their relevance to the project</td>
<td>Describe step 1 of the methodology with supporting slides</td>
<td>Slides describing step 1</td>
<td>Projection equipment</td>
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<td>Verbally share the story of the bicycles and insist on the importance of performing step 1</td>
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<td>Ask for reflections from the group</td>
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<tr>
<td>D</td>
<td>Data gathering techniques</td>
<td>Identify different data gathering techniques Understand benefits and challenges of each gathering technique</td>
<td>Divide into three or six groups, each one to describe one of the data gathering techniques: surveys, focus groups and case studies, and take notes on flipcharts</td>
<td>Flipcharts and markers</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Data gathering techniques</td>
<td>Debate the benefits and challenges of data gathering techniques</td>
<td>Share in plenary and close the segment with a summary of the step, its relevance and the different data gathering techniques and implications in staffing and resourcing</td>
<td>Flipcharts and markers</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Markets and power in markets</td>
<td>Develop a common understanding of market concepts Discuss power dynamics in markets</td>
<td>Present concepts of markets and power in markets according to conceptual document and open to questions and debate</td>
<td>Slides [1] markets [2] power in markets</td>
<td>Projection equipment</td>
</tr>
<tr>
<td>E</td>
<td>Markets and their characteristics</td>
<td>Compare markets of a specific region</td>
<td>Divide into groups and ask each group to think of three different markets and compare the characteristics they consider relevant</td>
<td>Flipcharts and markers</td>
<td></td>
</tr>
<tr>
<td>Column</td>
<td>Activity</td>
<td>Activity Description</td>
<td>Activity Details</td>
<td></td>
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<tr>
<td>F</td>
<td>Gendered market selection process</td>
<td>Present the gendered market selection process</td>
<td>Use slides to present the process. Open debate with the group. Slide gendered market selection process. Projection equipment.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>Further describe markets</td>
<td>Include additional dimensions to the market analysis</td>
<td>Divide in same groups as in E and include additional dimensions to the analysis: • Market trends • Key market actors • Available market services • Regulation and institutions related to those markets. Continue adding to the analysis of the same markets described in E. Flipcharts and markers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>Practical example of selection</td>
<td>Identify selection criteria for group selection. Select one market per group.</td>
<td>Present the example of Tanzania with the supporting slide. Allow the groups to select their preferred market stating the selection criteria used. Slide of Tanzania example. Projection equipment. Flipchart and markers.</td>
<td></td>
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</tr>
<tr>
<td>G</td>
<td>Recap</td>
<td>Recapitulate the content covered so far</td>
<td>Ask the participants to share what they recall of the content and complement elements that have been left out. Paper signs with names. Masking tape. Wide space.</td>
<td></td>
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<tr>
<td>G</td>
<td>Market systems</td>
<td>Gain a general understanding of market systems. Clearly differentiate between market chain, market services and dis/enabling environment.</td>
<td>Perform the activity of the market system, using names of market actors from all three components to assign roles to the participants. Using the example of one entrepreneur/producer trying to reach the market, ask the producer to interact with all market actors to launch a business. Let the activity run. After the activity, ask participants to express how they feel and to reflect on the activity.</td>
<td></td>
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</tr>
<tr>
<td>H</td>
<td>Gendered market mapping in practice</td>
<td>Develop a better understanding of the gendered market mapping process.</td>
<td>Divide into groups and ask each group to elaborate a gendered market map for the selected market. Each group, or as many as time allows, should present its results and feedback should be provided to each group. Flipcharts and markers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Gendered market mapping in practice</td>
<td>Reflect upon the gendered market mapping process</td>
<td>Remaining groups should present Open the plenary for questions and feedback</td>
<td>Flipcharts and markers</td>
<td></td>
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</tr>
<tr>
<td>I</td>
<td>Gendered market map and programme design</td>
<td>Reflect on how gendered market mapping contributes to programme design</td>
<td>Present the Ethiopian example of gendered market mapping with supporting slides Discuss benefits and challenges of gendered market mapping with supporting slides Open the space for questions and reflections</td>
<td>Slides with Ethiopian example and slides with benefits and challenges of GMP Projecting equipment</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Alternatives</td>
<td>Reflect on the existence of multiple alternatives for any given task</td>
<td>Explain the activity of the “Line of life” where the group is asked to generate three different alternatives to go over a straight masking-tape line on the floor, first individually, then in small groups, then as a whole group. No repetitions allowed. Then count the number of different alternatives and open the space for reflections.</td>
<td>Masking tape Wide space</td>
<td></td>
</tr>
<tr>
<td>J</td>
<td>Identification of WEL opportunities</td>
<td>Understand the characteristics of a WEL opportunity Identify opportunities in an example</td>
<td>Present the description of step 4 with supporting slides Divide groups again, and ask them to identify WEL opportunities in different areas of the gendered market map Share results in plenary and provide feedback</td>
<td>Slides for step 4 Projection equipment Flipcharts and markers</td>
<td></td>
</tr>
<tr>
<td>K y L</td>
<td>Feasibility study process</td>
<td>Make a dry run of the feasibility study process Understand confusion and pressure and relate to other people’s experience</td>
<td>Use the slides for the feasibility study process to divide the content in three subsections, and allow the groups to work on each section for as long as the two segments allow. Do not allow more time for each section, all three sections must be presented and worked on within these two segments</td>
<td>Slides for step 5 Projection equipment Flipcharts and markers Computers or calculators, at least one per group</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>Business plan</td>
<td>Reflect about the feasibility study process and the business plan</td>
<td>Present the results of the feasibility study process of the groups and provide feedback Show the structure of a business plan, its uses and how it relates to the feasibility study process with the supporting slide Open the space to reflect upon feelings, processes presented and to share perceptions of current gaps to deliver the process</td>
<td>Slide for business plan Flipcharts and markers</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>Get the energies back</td>
<td>Perform an energetic activity</td>
<td>Select and guide an energetic activity to help the group recover from the previous process</td>
<td>Wide space</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>Promoting positive changes at the household level</td>
<td>Start the debate on how to generate positive changes at the household level</td>
<td>Open the space for debate with regards to the implications of business in the lives of women and men in the communities. Facilitate the expression of personal perceptions and potential alternatives as they emerge</td>
<td>Slide of the WEL steps</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Promoting positive changes at the household level</td>
<td>Reiterate the expected processes within WEL. Generate ideas around promoting positive changes at the household level</td>
<td>Provide a quick recapitulation of the three processes involved in WEL: • Develop and grow a viable business initiative • Promote positive changes in power relations at different levels • Engage others in the process</td>
<td>Flipchart and markers</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Promoting positive changes at the household level, the Oxfam proposed method</td>
<td>Understand the process of creating positive beliefs in the communities</td>
<td>Explain the repetitive process of divergent and convergent thinking to extract the core negative beliefs and change them into positive beliefs that release resources for women’s economic leadership with supporting slides</td>
<td>Slides for step 6</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Risk management</td>
<td>Identify allies of the process Identify potential risks for women at different levels and develop strategies to deal with this risk</td>
<td>Ask the groups to identify potential allies in the territories they have been analysing that could support and spread the new positive belief</td>
<td>Flipcharts and markers</td>
<td></td>
</tr>
<tr>
<td>O</td>
<td>Total recap</td>
<td>Recapitulate all previous content</td>
<td>Ask the group to describe all content covered up to this point and complement with what has been left out</td>
<td>Slides of step 7</td>
<td></td>
</tr>
<tr>
<td>O</td>
<td>Engaging others</td>
<td>Understand the benefits and process of engaging others</td>
<td>Present the content of step 7 with supporting slides Open the space for reflections and experience sharing on engaging with non-traditional partners of each participating organization</td>
<td>Projection equipment</td>
<td></td>
</tr>
<tr>
<td>O</td>
<td>Dramatization</td>
<td>Observe and debate relationship development</td>
<td>With two or four volunteers, present a dramatization of two completely different negotiations, one unsuccessful and one successful, stressing the importance of building rapport and empathy. Open the space to share feelings, perceptions and additional personal experiences. Provide closing remarks for the content of the workshop.</td>
<td>Wide space Chairs</td>
<td></td>
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<tr>
<td>P</td>
<td>Reflections about WEL and next steps</td>
<td>Reflect upon potential WEL implementation. Share potential next steps. Express in principle commitments for follow up activities.</td>
<td>Allow local personnel to provide closing remarks of the complete process and provide additional information about future engagement with the organization. Allow organizational teams to gather and reflect upon next steps. Share final remarks of each group.</td>
<td></td>
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</tr>
<tr>
<td>P</td>
<td>Evaluation</td>
<td>Evaluate the workshop</td>
<td>Complete evaluation forms. Evaluation forms.</td>
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</table>
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This guide draws upon the original WEL methodology developed by Thalia Kidder and the Oxfam GB team in Oxford, as well as a systematization of shared learning and exchanges among Oxfam staff, partners and beneficiaries in and outside of the Latin American and Caribbean region, since 2010. These insightful exchanges have provided the basis for this guide, which aims to promote ongoing analysis of how best to promote Women’s Economic Leadership, as well as to implement and expand upon the originally developed methodology.

This is the second of three guides in The Women’s Economic Leadership in Latin America and the Caribbean Series. It is also available in Spanish under ISBN 978-1-78077-707-8.

Oxfam publishes programme policy and learning papers to contribute to debate on development and humanitarian policy issues and to improve programme planning and delivery. For further information on the issues raised in this paper please e-mail policyandpractice@oxfam.org.uk.
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Women’s Economic Leadership in Latin America and the Caribbean
This series of three guides has been prepared to support the development and delivery of a programme focussing on developing Women’s Economic Leadership in Latin America and the Caribbean. It is based on work done by Oxfam GB to support its staff in Latin America and the Caribbean in the delivery of market-based livelihoods programmes with a focus on gender justice. This present series of guides has been developed with Value for Women Ltd.
Book 1: A guide to key concepts
Book 2: A guide to implementation
Book 3: Prevention of violence against women in the context of programmes

This is Book 2 in the series.
This guide will improve the readers’ knowledge of the Women’s Economic Leadership (WEL) methodology so they are equipped to deliver interventions that reduce poverty. It does this by influencing changes in people’s positions in markets, communities and households, by enhancing women’s position and power in society, by opening up resources so changes can be sustained and scaled up, and by contributing to the gender justice agenda as a key point for advancing women’s rights. It offers tools for analysis and learning in order to complement and accompany field experience and practice. The contents should form part of a continuous learning process.

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