MAKE DEVELOPMENT INCLUSIVE

HOW TO INCLUDE THE PERSPECTIVES OF PERSONS WITH DISABILITIES IN THE PROJECT CYCLE MANAGEMENT GUIDELINES OF THE EC

A PRACTICAL GUIDE
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This manual is part of the project “Disability mainstreaming in Development Cooperation”, supported by DG Employment and Social Affairs of the European Commission. The contents of this manual are the sole responsibility of CBM.

This work will be updated in future according to user feedback.

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This manual is the work of many people: original authors whose work we have borrowed from and adapted, and the many advisors and contributors who gave their time and expertise.

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IMPLEMENTATION AND MONITORING: HOW TO INCLUDE A DISABILITY PERSPECTIVE

CASE STUDIES FOR IMPLEMENTATION AND MONITORING PHASE

RELIEF AND REHABILITATION FOR PEOPLE WITH DISABILITIES DURING EMERGENCY SITUATION IN NORTH LEBANON

MAINSTREAMING DISABILITY IN THE PRIMARY HEALTH CARE SECTOR IN THE STATE OF GUJARAT, INDIA

IMPLEMENTATION AND MONITORING: PRACTICAL TOOLS FOR INCLUDING A DISABILITY PERSPECTIVE

EVALUATION: HOW TO INCLUDE A DISABILITY PERSPECTIVE

CASE STUDIES FOR EVALUATION PHASE

INCLUDING PERSONS WITH DISABILITIES IN WATER AND SANITATION PROJECT: MALI

PROMOTING A DISABILITY PERSPECTIVE IN UGANDA’S HIV/AIDS NATIONAL RESPONSE

EVALUATION: PRACTICAL TOOLS FOR INCLUDING A DISABILITY PERSPECTIVE

THE ON-LINE TOOL-BOX

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Petra Uhl, Diana Ureta, Hallina Weyers, Jerome Zayas

Particular thanks go to
Patrick Berckmans, EuropeAid for on-going advice/support, and to Ronald Wiman MFA Finland, much of whose work we have adapted for this manual.
Ute Möhring EC Delegation in Ghana for her advice and provision of a case study.
Your comments on this manual are very welcome. Please contact: Catherine Naughton, CBM, EU Liaison Officer. catherine.naughton@cbm.org
This accompanies Part I of the manual ‘How to include the perspectives of persons with disabilities in the project cycle management guidelines of the EC’. It is practical in nature, and is designed to be used during the project management process.

For each phase of the project cycle we present:
1. What this phase is about
2. The purpose of including a disability perspective at this phase
3. The expected results of including a disability perspective
4. The difficulties often encountered and the keys to success
5. The possible cost implications of including a disability perspective
   - Case studies
   - Practical tools

Four types of downloadable tools are presented in the on-line tool-box:
(www.make-development-inclusive.org)
1. Tools for disability-inclusive project planning and management for general use
2. Tools for disability-inclusive project planning and management based on EC guidelines
3. Case studies which show the practical application of including a disability perspective at each stage of the project cycle
4. Tools for including a disability perspective, listed per sector

These tools have been assembled and adapted from the work of many experts in this field. They are intended to be specifically used to accompany the PCM of the EC, but could also be applied to other development management processes.

The on-line toolbox is a work in progress. We intend to update and adjust it based on user feedback. Throughout the text the on-line tools will be referred to in bold. A list of tools in the online toolbox is found on page 46.
The Programming phase of the PCM answers the question: “What are the development priorities and what is the EC’s strategy for assistance?”

This section briefly presents:
1. What the programming phase is about
2. The purpose of including a disability perspective at this phase
3. The expected results of including a disability perspective
4. The difficulties often encountered and the keys to success
5. The possible cost implications of including a disability perspective
   - Case studies
   - Practical tools (briefly described here and available online: www.make-development-inclusive.org)

1. **What is the programming phase about?**
   

   “During the Programming phase, the situation at national and sector level is analysed to identify problems, constraints and opportunities which development cooperation could address. This involves a review of socio-economic indicators, and of national and donor priorities. The purpose of the programming phase is to identify the main objectives and sector priorities for development co-operation, and thus to provide a relevant and feasible programming framework within which programmes and projects can be identified and prepared. For each of these priorities, strategies that take account of the lessons of past experience are formulated”. (EC: PCM guidelines, p. 26)

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05
2. What is the purpose of including a disability perspective at this phase?
Including a disability perspective is relevant for all projects related to improvement of living conditions and poverty alleviation (see: ‘Is the inclusion of a disability perspective relevant to my work’). Including a disability perspective during the programming phase will ensure that the situation analysis will be more comprehensive, improving the possibilities for creating a programme framework that addresses poverty alleviation in an inclusive equitable manner.

3. Expected results of including a disability perspective in the programming phase
There is an increased chance that the programme orientations will address issues of concern to people living in poverty and in particular persons with disabilities.

4. Difficulties often encountered and keys to success
Here is a list of the difficulties you may face in including a disability perspective at this stage, and suggestions on how to overcome these difficulties

4-1. Identification and consultation with stakeholders in the disability sector
This action requires that you:
- Have an overview of the stakeholders in the disability sector
- Have an understanding of what the role is of the various stakeholders
- Include stakeholders from the disability sector in civil society dialogue on an equal basis with other actors
- Use the tool ‘who are the stakeholders for disability inclusion’ to get an overview of the main stakeholders.
- Use the tool ‘how to find a Disabled Persons Organisation’ to actually locate representative organisations of persons with disabilities
- Set out a clear framework for involving persons with disabilities. For example, persons with disabilities from the target group should be included in local planning and review processes, whereas a disability activist might attend an annual program review, but may not be involved in day-to-day decision-making (source: VSO 2006)
- Rather than creating separate ‘add-on’ events for persons with disabilities, ensure their participation in the regular management and consultation processes like other stakeholders (source: VSO 2006).
- Use the tool ‘accessible meetings or events’ for planning a meeting in a way that will allow full participation of persons with disabilities.

4-2. Acquiring quantitative and qualitative data on the disability situation in your country or region
Disability is often considered as “invisible” due to the frequent absence of disability disaggregated data. It is crucial that you do not interpret absence of data with absence of persons with disabilities.
- Find available data: Liaise with national disability stakeholders: DPOs, disability service providers, Ministries for Health, Education, Statistics, etc. Liaise with International organisations. (see: 'Where to find data on disability')
- If data are absent, consult with the key disability stakeholders to initiate research and data collection.
- If the CSP and the NIP contain a plan to support of the National Statistics department, include a disability dimension. This will ensure that the National Statistics system integrates disability data that will be available in the future. Consult beforehand with the stakeholders for disability inclusion on the best approach in terms of including the disability dimension in National Statistics. (See Case study: Including persons with disabilities in National Statistics in Morocco www.make-development-inclusive.org)
4-3. Convincing authorities and other stakeholders of the need to include a disability perspective

Many actors in the development process are unaware of the need to include a disability perspective in poverty alleviation strategies.

- Explore whether the country has signed the UNCRPD. This will reinforce its responsibility to include a disability perspective, for an up to date list of signatories see http://www.un.org/disabilities/countries.asp?navid=12&pid=166
- Share the information contained in Part I this manual ‘Concepts and Guiding Principles’. This explains the importance of including the perspectives of persons with disabilities in development projects.
- Promote the participation of persons with disabilities in consultation meetings. This can easily be organised whenever civil society consultation takes place (see ‘Accessible meetings or events’).

5. The possible cost implications of including a disability perspective in the programming phase

- To call stakeholders from the disability sector for a meeting and ensure their participation in an accessible manner (see ‘Accessible meetings or events’):
  - Participation costs of participants- the same as for other actors
  - Organisation of the meeting in a physically accessible environment; this only impacts on the choice of the venue and should not involve extra cost. You can consult with invitees with disabilities to ask for advice on accessible venues for meetings. (See: ‘Accessibility guidelines and checklists on-line’)
  - Consult with invitees with disabilities about which support services may be required or other provisions that should be made.
- To conduct a disability analysis, if necessary.
- If it has been decided to provide support for including a disability dimension in National statistics, some costs need to be included in the budget such as training of the relevant staff (from decision makers to interviewers) on disability; consultations with stakeholder for disability inclusion, etc.
CASE STUDIES FOR PROGRAMMING PHASE

This section provides case studies illustrating disability inclusion in the programming phase of the project cycle

Case Study: Inclusion of Disability in the Programming of the 10th EDF in Ghana

This case study has been written by Ute Möhring, Programme Officer of the European Commission’s Delegation to Ghana. She describes the process of including a disability perspective in the development of the ECs Country Strategy Paper for Ghana.

Case Study: Including persons with disabilities in National Statistics in Morocco.

In Morocco, the State Secretary in charge of the Family, Childhood and Persons with Disability developed a national survey. This case study illustrates how a consortium of CREDES (consultant agency) and Handicap International (NGO) supported the Ministry in developing statistics on disability, providing essential information for further policy formulation.
This case exemplifies how disability inclusion can be done at the programming level. It has been written by Ute Möhring, Programme Officer of the European Commission’s Delegation to Ghana.

STAKEHOLDER CONSULTATIONS DURING THE PROGRAMMING OF THE 10TH EDF IN GHANA

«In Ghana, programming of the 10th EDF in 2006 included a number of stakeholder consultations. Civil Society Organisations as well as state and non-state actors, government officials, departments and agencies involved in ACP-EU cooperation, district assembly representatives and traditional rulers were invited to join the regional workshops to comment on the draft CSP and NIP from their perspectives. These consultations took place in 3 major cities.»

INCLUSION OF DISABLED PEOPLES’ ORGANISATIONS AND NGOs IN THE PROCESS

«Prior to the workshop in Accra, I held a meeting with several staff members of an international NGO, Action on Disability and Development, to discuss the situation of disabled people in Ghana, the existing support structures and networks of relevant organisations and the need for more advocacy on disability issues. The ADD representative from the UK pointed out that their organisation had been part of the coalition of EDF and IDDC which lobbied the European Commission to address disability and development and which contributed to the drafting of the EU Guidance Note on Disability and Development for European Union Delegations and Services (2004).

I repeated our invitation to the EDF consultation workshop which was scheduled for the next day. The Ghana Country Representative of ADD, Mr. Felix Dery, and the Senior Programme Officer, Mr. Charles Appiagyei, attended the workshop. In the discussion on the country strategy, they raised the importance of a two-fold approach: inclusion of people with disabilities as a target group for EU support and of disability as a cross-cutting issue in the Ghana country strategy."
This contribution was well noted by the Head of Delegation. In the evaluation of the stakeholder consultations, it was given due consideration and recommended for action in the final programming of the CSP. The Ghana CSP now mentions the rights of people with disabilities as a cross-cutting issue under democracy and good governance. In the relevant section it says that EC activities will include a strong focus to cross-cutting issues such as the rights of people with disabilities. It continues ‘the success in focusing on these priorities will require that for all EC interventions initial baselines and indicators to monitor progress will be identified.’

In the National Indicative Programme, the EC programme in support of civil society organisations is outlined. This Programme will aim at ‘strengthening the capacity of civil society to participate actively in local government, including policy formulation, policy and implementation reviews, monitoring and evaluations. The programme will focus strongly on financial management, representation and governance structures and performance assessment. Priority will be given to existing rural grass-roots organisations, with strong membership at local levels, promoting the participation of the poor, women, children and disability groups in development.’

LESSONS LEARNT AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION

The consultation process for the formulation of the programming of the 10th EDF in Ghana has been including Disabled Peoples’ Organisations and other stakeholders, which constitutes an essential precondition for disability inclusive policies and interventions in all sectors in the country.

By doing so, the EC Delegation to Ghana has set an example and demonstrates the importance of continuous formal and informal dialogue with disability organisations already starting at the programming phase in order to give a voice to persons with disabilities and their organisations and to create a forum where their concerns can be heard and taken on board by decision makers.

For further information please contact:
Ute Möhring, European Commissions Delegation to Ghana

10th EDF- Country Strategy Paper:
INCLUDING PERSONS WITH DISABILITIES IN NATIONAL STATISTICS

This case study describes the cooperation between Ministries, Handicap International and the consultant agency CREDES which led to conducting a national survey. It exemplifies the support for Ministries to develop statistics on disability at a national level.

INCLUSION OF STATISTICS ON PERSONS WITH DISABILITIES IN NATIONAL STATISTICS

From August 2003 to January 2006, the consortium CREDES / Handicap International has provided technical assistance to the State Secretary in charge of the Family, Childhood and Persons with Disability for the implementation of a National Survey on Disability in Morocco. The summary report of the study has been published on the Ministry of Social Development website.  

TO MEASURE DISABILITY PREVALENCE AT NATIONAL LEVEL

The aims of the national survey on disability were to measure disability prevalence at national level and to receive a detailed analysis of the impairment and its causes leading to disability. In addition, the study intended to research the impact of disability on life habits and socio-professional integration of affected people and its interaction with environmental factors facilitating or impeding social integration. A final study element represented the analysis of the existing schemes for integrating persons with disabilities in different sectors.

To reach these goals, four specific surveys have been implemented: 1) A qualitative survey with one hundred persons with disability, and also parents of persons with disability, professionals and representatives of organisations working on disability. 2) A quantitative survey with 9,674 households, regrouping more than 54,000 persons. 3) A qualitative survey with more than one hundred actors such as ministries, public and private services etc. 4) A bibliographic study of all statistics and studies available on the causes of impairment.

TO SET A CONCEPTUAL AND STATISTICAL FRAMEWORK FOR DISABILITY UNDERSTANDING

In order to develop a common understanding of disability and a common terminology and language for the analysis, a conceptual framework has been elaborated including different stakeholders concerned. From...
this conceptual framework, the definitions used for the surveys, of disability, persons with disability and the impairments which contribute to disability situations, have been elaborated. Different parts of the study have been implemented in cooperation with different organisations and services by taking into account the view of various stakeholders including persons with disabilities. Several guidelines have been designed for guiding interviews and data collection.

The National Survey has produced more than 300 statistic tables on disabilities and a database that has been integrated into the State Secretariat on Family, Childhood and Persons with Disabilities. It also resulted in a specific study on the pathologies and traumata which contribute to disability in Morocco and an inventory of the resources and services available and provided recommendations for the formulation of a future National Plan of Action.

**LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION**

- The project resulted in the production of data on persons with disabilities and in integrating these data in national statistics
- The approach is particular in the sense that starting from the programming level, stakeholders including persons with disabilities and disabled peoples organisations have participated to develop a commonly understood and shared framework on disability
- The cooperation between disabled peoples’ organisations, NGOs, government agencies and other stakeholders can help to endorse the collected data in sustainable way

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**Or check online:**
www.social.gov.ma/Famille_Enf_Han/FEH/index.htm (French, Arabic)
www.social.gov.ma/Famille_Enf_Han/FEH/pdf/ENH/ENH%20-Anglais.pdf (English)
1. To guide the EC task manager towards key disability questions at programming phase

This table presents the key questions and related available tools for including a disability perspective for each task in the programming phase as listed in the PCM guidelines.

Tool: ‘Guidance for task manager to include a disability perspective at the programming stage’

2. To carry out an in-country disability analysis

This tool lists all questions (from national to local level) you need to ask in order to analyse the disability situation in a specific country. You can use it yourself or you can recommend it to anyone who undertakes a study of the disability situation in a country, for example a contractor. It can also serve as guide for your partners (eg. a DPO or development NGO).

Tool: ‘Framework for disability analysis at the country level’

3. To review an already elaborated CSP in order to include a disability perspective

Here is a list of questions that will help you to screen already elaborated CSPs. Each question that can be answered with “yes” offers an opportunity to include a disability perspective. Under each point you will find a list of tools and short arguments that will help you to put inclusion into practice and to justify your approach.

Tool: ‘How to explore options for the inclusion of a disability perspective in a CSP’

4. To include a disability perspective in a CSP

This is the EC model for the elaboration of the CSP with ‘disability entry points’ which we have created. They indicate where you could add a disability perspective. Arguments for each of those entry points are developed and accessible online when you click on it.

Tool: ‘CSP Model with a disability dimension’
In the identification and formulation phases of the project cycle, the following questions are answered: “Is the project concept relevant to local needs and consistent with EC policy priorities?” “Is the project feasible and will it deliver sustainable benefit?”

This section briefly presents:
1. What the identification and formulation phases are about
2. The purpose of including a disability perspective during these phases
3. The expected results of including a disability perspective
4. The difficulties often encountered and the keys to success
5. The possible cost implications of including a disability perspective

- Case studies
- Practical tools (briefly described here and available online: www.make-development-inclusive.org)

1. What are these phases about?

This section refers to the EC’s PCM Guidelines for Aid Delivery Methods (2004), available at http://ec.europa.eu/europeaid/reports/pcm_guidelines_2004_en.pdf; At the identification and formulation phase crucial decisions are taken. Projects are identified and formulated and decisions are taken as to whether to finance and support them.

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<tr>
<td>Financing proposal (individual projects)</td>
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<td>Project financing proposal Checklist for formulation phase</td>
<td>Background, Situation analysis, Project description, Management arrangements, Feasibility and sustainability issues</td>
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</table>
2. What is the purpose of including a disability perspective during these phases?
These phases are crucial in the project cycle; they lead to the inclusion or the exclusion of persons with disabilities from the benefits of the identified and formulated projects.

A disability perspective can be included by:
- Identifying projects to support in line with EC orientations where inclusion of the perspectives of persons with disabilities is relevant
- Assuring that an appropriate level of inclusion is incorporated into these projects
- Ensuring that projects identified and supported do not exclude persons with disabilities

3. Expected results of including a disability perspective during these phases
- There is an increased chance that the projects/programmes will address issues of concern to people living in poverty and that access to project benefits will be equitable, in particular for persons with disabilities.
- If a disability perspective is not included when it is relevant, the identified projects will lead to the exclusion of persons with disabilities from the expected results.

4. Difficulties often encountered and keys to success
Here is a list of difficulties you may face at this stage, and suggestions on how to overcome them.

4-1. CSP and NIP do not specifically mention persons with disabilities
The process of a project is cyclical, and it may appear difficult to integrate new elements during the process which were not initially planned. Thus, what are the alternatives if a disability perspective was not included in the previous phase?
- Use the tool "How to explore options for the inclusion of a disability perspective in a CSP" in order to identify the places where a disability perspective could be included

4-2. Identification and consultation with the stakeholders for disability inclusion
- See section. 'Programming: How to include a disability perspective'

4-3. Acquiring quantitative and qualitative data on the disability situation
- See section. 'Programming: How to include a disability perspective'

4-4. How do you know if the project idea / proposal will exclude persons with disabilities?
The identification and formulation phases consist of a succession of decisions to be taken: what are the problems, their causes and effects? What are the priorities? Once you transform your problem tree into an objective tree, which problem / objective should be prioritised? How do you prioritize?

Answers to these questions can be taken at different levels:
Firstly, at the participation of stakeholders’ level. The section “Participation and facilitation” detailed in PCM (section 8, 118-122) applies also to the disability sector. Participatory tools for this process can be used to bring in the perspectives of persons with disabilities.
- See ‘different degrees of inclusion’
- See ‘who are the stakeholders for disability inclusion’
- See ‘specific support to the stakeholders for disability inclusion’
- See ‘accessible meetings and events’
- See ‘programming: how to include a disability perspective’.

Secondly, at the point of screening of the decision, selecting the strategy and identifying the activities.
- See: “Planning for all”

Lastly, by making a ‘rapid analysis’ on how your project idea/proposal is disability-inclusive. This tool can also be used to help you decide whether or not you will support a project.
- See: “Rapid Disability Analysis”
4-5. How do you ensure that the result really includes a disability perspective?
Projects usually aim to improve the social, health and economic conditions of the population and to develop infrastructure for the benefit of all. However, it is often unclear how persons with disabilities will be involved in the elaboration or benefit from the results of a project. Three main key elements will show you that disability is included in the project:

- The participation of disability stakeholders (in particular the participation of representative organisations of persons with disabilities or other organisations active in the disability sector)
- The inclusion of specific activities developed for reducing physical, institutional and social barriers that persons with disabilities face
- The reflection of these activities in the budget.

Use ‘Planning for all’
Use ‘Budgeting the inclusion of a disability perspective’

4-6. Decision makers (in the government or the EC) are not convinced that the project idea / project proposal should include a disability perspective
Integrating a disability dimension in ‘terms of reference’ for further data collection and analysis will contribute to providing evidence of the link between disability and the sectors / activities planned to be implemented by the project.

- Use the tool Preparing Terms of reference – at Identification stage
- Use the tool Preparing Terms of reference – at Formulation stage

5. What is the cost implication of including a disability perspective during these phases?
- To call stakeholders from the disability sector for a meeting and ensure their participation (See ‘Accessible meetings or events’):
  - Participation costs of participants- the same as for other actors
  - Organisation of the meeting in a physically accessible environment; this only impacts on the choice of the venue and should not involve extra cost. (See ‘Accessibility guidelines and checklists on-line’)
  - Consult with invitees with disabilities about which support services may be required or other provisions that should be made.
- If necessary, conduct a disability analysis (see ‘Framework for a disability analysis at country level’)
- Expert services may be needed to evaluate what additional measures (activities, means and costs) are required to ensure full inclusion of the perspectives of persons with disabilities. (see ‘planning for all’). In this case, these expert services need to be included in the budget. Where possible search for experts/consultants with disabilities or from disabled people’s organisations to maximise the inclusion of a disability perspective and the empowerment of disability stakeholders in this process.
Four case studies illustrate how to include people with disabilities in the identification and formulation phase. Two cases concern the Education sector, and one is related to the Transport sector. The final case illustrates strengthening of disabled persons organisations (DPOs).

**Case Study: Promoting inclusive education in Kenya**

This case takes place in Kenya and is implemented by the NGO Leonard Cheshire Disability (LCD). It illustrates how inclusion of students with disabilities in mainstream schools has been achieved. The project initiators put emphasis on participatory methods for integrating all the stakeholders including students, parents, teachers and school staff in the identification and formulation of the interventions.

**Case Study: Introduction and mainstreaming of Inclusive Education in Papua New Guineas national system**

The case study has been sent by Callan Services for Disabled People based in Papua New Guinea. It demonstrates the adoption of Inclusive Education by the independent State of Papua New Guinea. A pilot project has been implemented which serves as model for further identification and formulation of inclusive policies and interventions at national level.

**Case study : Making transport in the Philippines accessible for persons with disabilities**

The public transport accessibility initiative has been initiated by CBM in the Philippines and implemented by an Alliance of different stakeholders including people with disabilities and resulted in the inclusion of disability in public transport policies in one area of the Philippines.

**Case Study: Strengthening disabled peoples’ organisations- case studies from Africa and the Balkans**

Two projects implemented by Handicap International are presented in this case. They demonstrate how the disability sector can be strengthened in two very different geographical areas: Africa and the Balkans.
This case illustrates how inclusion of students with disabilities in schools has been achieved. Leonard Cheshire Disability put emphasis on participatory methods for integrating all the stakeholders including students, parents, teachers and school staff in the identification and formulation of the interventions.

**THE CONTEXT**
Few children with physical disabilities from neighboring districts residing in a Cheshire home were attending Oriang primary school. The needs of these children were not being met in an environment where: teachers lacked the skills to support children with special needs, peers were not prepared to work with children who looked different, a hostile physical environment not adapted to suit their mobility needs, lack of adaptive aids, general inadequate learning materials to enhance quality education for all the children.

The entire community lacked awareness on disability issues compounded with negative cultural beliefs that blames causes of disabilities to ancestral sins and other misdeeds.

**TO ENHANCE LEARNING ENVIRONMENTS THROUGH PARTICIPATION OF TEACHERS AND CHILDREN**
Mainly funded by Comic Relief from 2002 to 2007, this five-year project has been carried out in five neighboring primary schools, in partnership between Leonard Cheshire Disability, Cheshire Homes Kenya, the Ministry of Education and the local catholic diocese. The project has strived to bring about change in culture, policy and practices in order to support all children to gain quality education.

Through the use of participatory strategies the project’s stakeholders have with the technical support of LCD worked to enhance learning environments. Several capacity building events have empowered the teachers and the community, enhancing skills in resource mobilization; the dilapidated buildings in schools have been turned into new permanent classrooms. Teachers have also changed to learner-centered approaches, incorporating child-to-child activities, enabling children’s voices to be heard and also to actively participate in their learning. Community Based Rehabilitation has been a complimentary component of Inclusive Education, where trained community health workers administer and train parents in basic physical therapy activities and primary health care initiatives such as epilepsy management. Schools have strived to adapt the physical environment to make it accessible and more conducive for learning.
AN INCREASED ENROLLMENT OF CHILDREN WITH DISABILITIES
As a result, the general school enrollment, and particularly the enrollment of children with disabilities and others with special needs, has increased considerably from 225 (2003) to 564 (2007). Forums such as inclusive education and child to child days have brought community and other stakeholders together with each group using performing arts to create awareness on disability issues. The disability resource centre strategy has been used to enable community members and schools to access reading materials, such as books on health issues and magazines.

LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION
- The inclusion of children with disabilities in the education system has been achieved through advocating at schools and education agencies to take these children into account.
- Through participatory approaches, all stakeholders involved in the education process (from the children to the teachers) have been integrated in the identification and formulation process which led to adequate and sustainable interventions.
- The success of the project has necessitated the need to replicate it at the provincial level, which is envisaged to build the capacity of different partners to engage in the implementation of inclusive education program at a wider level.

This case study has been adapted from a text written by LCD East and North African Region

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A pilot project has been initiated by Callan Services for Disabled People which serves as model for further identification and formulation of inclusive policies and interventions at national level.

**Area:** Asia  
**Sector:** Education  
**Phase of PCM illustrated:** Identification and formulation  
**Implementing organisation:** Partnership Faith Based organisation, NGO and Ministry of Education, with support of EC

**DISABILITY INCLUSION IN THE NATIONAL EDUCATION SYSTEM**

This case study demonstrates the adoption of Inclusive Education by the independent State of Papua New Guinea which is a story of affirmation of rights to education of children with disability. At the end of 1990, the Congregation of Christian Brothers (PNG) Inc. established a new agency, called Callan Services in partnership with CBM.

In 1990, there neither existed inclusive nor special education in PNG’s education system. In the late 1990s, the National Education Board was advised that the Christian Brothers were going to integrate a training course for all student-teachers how to teach children with disabilities in regular schools in the curriculum for a new 3 year Diploma in Primary Teaching for St. Benedict’s Teachers College in Wewak. It was estimated there were about 60,000 children with disability needing schooling in the country and that only the regular school system could respond to their learning needs. The basic rights of these children as affirmed in the country’s Constitution were appealed to. Both the Churches Education Council and the National Board for Disabled Persons supported this pilot project funded by CBM and entitled Callan Services.
INCLUSION OF DISABILITY THE NATIONAL EDUCATION PLAN
Mr. Keith Stebbins of the NdE and Br. Graeme Leach of Callan, both members of the Committee of the National Special Education Committee, developed first a report to the National Education Board in 1992 and then a submission of a National Plan through the Minister of Education to the National Executive Council (Cabinet). It suggested extending the model project in Wewak to all Teachers Colleges. As a result, the enrolment of children with disabilities in regular schools became national policy and existing special schools were transformed into Resource Centres with their teachers being salaried by the national government. Following the Cabinet decision to adopt the Plan the Prime Minister directed the Secretary for Education to include the Plan in the budget for 2004.

LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION
- Increased ownership of the inclusion process in the education systems was encouraged through the partnership between the Church and the State and cooperation with the National Board for Disabled Persons and the Churches Education Council was helpful.
- The combination of internal and external advocacy and diplomacy helped to enhance the government’s commitment.
- Referring to child rights and Constitutional rights minimises opposition.
- Investing in a pilot project and making it a success story provides a helpful model to refer to in further activities. Training teachers in the project and including disability in the regular training project builds up capacity and motivates teachers to support inclusion in education in the long run.
- It is one thing to have a policy; it is quite another thing to implement that policy at all levels and to the point of having quality inclusive education in all schools. Although a start has been made in PNG with the direction set, in terms of a thorough implementation across the board, PNG has not yet arrived.

This text has been adapted from an article written by Graeme Leach, Callan Services for Disabled Persons

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This case exemplifies how disability inclusion can be mainstreamed in the public transport sector. The public transport accessibility initiative has been initiated by CBM in the Philippines and implemented by an Alliance of different stakeholders including persons with disabilities and fostered the inclusion of disability in public transport policies in the Philippines.

THE COUNTRY CONTEXT
The Transport Accessibility Initiative was undertaken in light of the fact that a growing number of persons with disabilities cannot participate in the affairs of the community due to inaccessible transportation facilities. Statistics from the National Census Office reveal that there are 942,232 persons with disabilities all over the country as per census report in the year 2000. Only 2 percent of children with disabilities have access to elementary education. The Department of Education reported that one of the major reasons for that is the absence of accessible transportation. In addition, already existing difficulties in finding employment for persons with disabilities are further aggravated by transportation barriers.

Despite the legal framework for the inclusion of people with disabilities¹, implementation and compliance by the transportation sector is very poor. Drivers and vehicle operators are not aware of the existence of these laws and negative attitudes of drivers towards people with disabilities remain a major problem which needs to be addressed. Past efforts for encouraging a meaningful dialogue between public transport actors and the disability sector have failed.

PROMOTING ACCESSIBLE PUBLIC TRANSPORT
In that context, CBM Philippines started the public transport accessibility initiative as part of other programmes promoting disability mainstreaming in different policy areas in the country. An alliance has been formed, with the acronym PASAKAY (which means to give a ride to, in the local language), composed of representatives of the public transport sector, persons with disabilities, representatives from the National Council on Disability Affairs,

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¹ Batas Pambansa Bilang 344 (National Law), Accessibility Law in 1983: purpose of enhancing the mobility of persons with disabilities by requiring public utilities to install facilities to make transportation accessible
Enactment of Republic Act 7277 known as the Magna Carta for Disabled Persons: provides in Section 25 thereof for a barrier-free environment by making BP 344 a supplementary law to its implementation
the Department of Transportation and Communication-DOTC (both government agencies), representatives of CBM-supported projects, the CBM Regional Office and the Public Transport Affairs Office under the Office of the President. A manifesto was presented to the President Gloria Macapagal Arroyo on July 17, 2008 on the occasion of the annual National Disability, Prevention and Rehabilitation Week, and President’s Office recently announced to endorse this to the DOTC for follow up. As a follow through of this initiative, the First National Conference on Accessible Transportation for Persons with Disability is scheduled in March 2008 wherein a Declaration of Commitment will be presented to the President, and a national plan of action on accessibility is expected to be crafted. This national conference will formalize earlier commitments made on policy review, vehicle design standards, compliance with laws, multi-sectoral partnerships, advocacy, and training in support of promoting accessibility of the public transport system.

The Alliance sees its role in mainstreaming to create and secure spaces for active consultation of people with disabilities and their organisations, in policy formulation and reviews related to persons with disabilities such as accessibility of public transport. The approach taken is to directly engage with key government agencies in order to encourage them to implement policies and institutional provisions as part of regular service provisions as well as to include persons with disabilities in all future consultations and crafting of policies and programmes. Its guiding principles being Access-Equity-Participation, the Alliance has also put emphasis on collaborating with people with disabilities, organizations of persons with disability and NGOs working in the disability sector, government agencies both at national and local level.

Offshoots of the accessibility initiative include the exploration of collaboration with the Japanese development cooperation agency (JICA) in its project in the Philippines on non-handicapping environment in cooperation with the National Council on Disability Affairs (NCDA), the collaboration with entities addressing accessibility of the built environment, and participation in the Sub-Committee on Accessibility and Transportation in the NCDA.

LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION

- CBM Philippines facilitated the creation of an avenue of consultation and collaboration between the disability community and government departments in charge of accessibility and transport, and the public transport sector. Thus, accessibility has been addressed from a systemic perspective as part of government programmes. Institutionalised provisions have been set up in a sustainable way and not as a stand alone, one-off initiative.
- The initiative has been consequently designed and implemented with the participation of people with disabilities and Organisations of Persons with Disability which increased their space for influencing policy making and raised awareness among the involved stakeholders.
- The initiative created opportunities for the disability sector, supported by NGO partners, to take part in key aspects of development programs of government relating to a focal area such as accessibility for persons with disability, which includes policy review, enforcement of policies, program implementation, research and development on vehicle standards, among others, through multi-sectoral partnerships at national and local levels which provided platforms for advocacy for their rights, concerns and issues on accessibility.

This case study has been adapted from a text written by Stephen E. Alcantara, CBM-SEAPRO Philippines

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Stephen E. Alcantara
CBM-SEAPRO Philippines
The two following project examples demonstrate how the disability sector can be strengthened in two very different geographical areas: Africa and the Balkans.

**Area:** Eastern Europe and Africa  
**Sector:** Support to non state actors  
**Phase of PCM illustrated:** Identification and Formulation  
**Implementer:** NGO

**GENERAL CONTEXT**
Supporting persons with disabilities and enhancing their participation in policy making and development cooperation programmes is essential for achieving more inclusive societies. Handicap International (HI) has been supporting Disabled Peoples’ Organisations (DPOs) for two decades, in more than forty countries. As part of its work to support DPOs, HI implemented the SAPESH project in Madagascar from 2000 to 2005 with the support of EIDHR and French Ministry of Foreign affairs. From 2003-2008, HI has been implementing a similar project in South East Europe (www.share-see.org), co-funded by the US State Department, DFID and EIDHR. Both projects focus on strengthening self-advocacy capacities of persons with disabilities and their organisations.

**IN MADAGASCAR: A MOVEMENT TO STRUCTURE**
In Madagascar, the challenge was to establish organisations representing persons with disabilities at local level and to create a national representative body of people with disabilities that could be acknowledged as counterpart by the Malagasy government. The few existing organisations of people with disabilities did not have the capacity to effectively participate in policy making and its members predominantly came from the capital. As a result of the capacity building process initiated by HI, more than twenty local disability organisations have been established who form the national Committee of organisations of people with disabilities (COPH). This body has achieved to build up internal democratic structures and represents the needs and claims of different groups of people with disabilities. The Committee was also successful in lobbying the government to pass the first legislation on rights of people with disabilities and some of the related by-laws.

**IN SOUTH EAST EUROPE: A MOVEMENT TO ENHANCE AND REVITALISE**
The situation of disabled people’s organisations was different in South East Europe as a disability movement existed already during the socialist era. Built like trade unions, the movement was organised according to types of impairment or status (blind, deaf, paraplegic,…). Their main role was to channel some of the benefits granted by the Yugoslavian legislation. These organisations were not oriented towards inclusion but rather protection and faced difficulties to play adequate role in the socio-economic transition. At the same time, new disability organisations emerged whose advocacy approach differed from those unions by promoting inclusion for people with disabilities.
The aim of the project initiated by HI together with four local DPOs in Bosnia Herzegovina, Albania, Montenegro, Macedonia, Serbia and Kosovo, was to enhance the movement and to develop its capacities for active participation in social policy reforms. In Bosnia-Herzegovina and Kosovo, the complexity of the political situation represented a strong obstacle for structuring the disability movement as activists were confronted with irresponsible authorities. In Albania, Macedonia, Serbia and Montenegro however, as government were more stable, discussions and negotiations were possible. These differences demonstrate that civil society building is directly related to state responsiveness, especially for excluded groups. The successes in fostering political debates encouraged the disability movement in the South East Europe to invest in overcoming some of their divisions and in some countries to renew the national DPO councils with the support of the European Disability Forum.

CHALLENGES IN SUPPORTING DPOs
In Balkans as in Madagascar, the difficulties of self-advocacy movement reflect low level of educational attainment of persons with disabilities due to their exclusion from the education system. Additionally in the Balkans, impairment based social protection policies has brought very strong division within the movement, as each group would try to retain and increase most of their previous benefits without taking into consideration key challenges faced by most persons with disabilities.

DPOs: MORE AND MORE PART OF THE DEBATE
In the Balkans as in Madagascar, during the five year project period, DPOs gained a relatively significant political space and managed to put disability as a key topic of social reform on the political agenda in most of the countries. Supporting the disability movement and DPOs as key partners constitutes a big challenge but also represents a key condition for inclusive development and the successful implementation of the UNCRPD.

LESSONS LEARNT AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION
- The support of disability stakeholders is one of the pre-conditions for inclusive development

This text has been adapted from a report by Alexandre Cote from Handicap International

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These tools are to be used in combination with 'Identification and Formulation: how to include a disability perspective.

1. To guide the EC task manager towards key disability questions at the identification and formulation phases

This table presents the key questions and related available tools for including a disability perspective for each task in the identification and formulation phase as listed in the PCM guidelines.

Tool: ‘Guidance for task manager to include a disability perspective at the identification phase’
Tool: ‘Guidance for task manager to include a disability perspective’

2. To conduct a stakeholders’ analysis to ensure the involvement of all the stakeholders for disability inclusion

These tools will help you identify which stakeholders you need to involve:

Tool: ‘Who are the stakeholders for disability inclusion’
This tool will help you to locate Disabled Peoples Organisations (DPOs).

Tool: ‘How to find DPOs the web’

3. To identify suitable disability-sensitive indicators for your sector

Tool: ‘Disability sensitive indicators in Health’
‘Disability sensitive indicators in Education’
‘Disability sensitive indicators in HIV&AIDS’
‘Disability sensitive indicators in Urban Development’
‘Disability sensitive indicators in Support to non state actors (DPOs and ‘Disability non state actors)’
‘Disability sensitive indicators in Water and Sanitation’

4. To ensure that the budget fully covers possible costs of including a disability perspective

This tool allows you to include main cost items that you have to consider when you plan to include a disability perspective in your project. It also gives you a guide for earmarking resources for disability inclusion:

Tool: ‘Budgeting the inclusion of a disability perspective’
5. To fill in the ‘Identification fiche for project approach’ including a disability perspective  
Use: ‘Identification fiche for project approach’

6. To fill in the ‘Action fiche for [beneficiary country/region/theme]’ including a disability perspective  
Use: ‘Action fiche for [beneficiary country/region/theme]’

7. To fill in the ‘Financing proposal’ with a disability perspective  
Use: ‘Financing proposal’

8. To prepare disability inclusive terms of reference  
Use: ‘Preparing terms of reference – at identification stage’  
Use: ‘Preparing terms of reference – at formulation stage’

9. To quickly screen a project to see if it includes a disability perspective  
This tool assists you to check whether a project includes a disability perspective or not. It can be used during the project selection process or for conducting a general review of your project.  
Use: ‘Rapid disability analysis’
The implementation and monitoring phases of the project cycle answer the questions: “Are the resources being used efficiently and effectively? What corrective action should be taken?”

This section briefly presents:
1. What the implementation and monitoring phases are about
2. The purpose of including a disability perspective during these phases
3. The expected results of including a disability perspective
4. The difficulties often encountered and the keys to success
5. The possible cost implications of including a disability perspective
   - Case studies
   - Practical tools (briefly described here and available online: www.make-development-inclusive.org)

1. What are these phases about?

At the implementation and monitoring phases the decision has already been taken to finance projects and programmes. During the implementation and monitoring phases results are delivered, purpose(s) and the overall objective of the project are achieved, the available resources are managed efficiently and progress is monitored and reported.

<table>
<thead>
<tr>
<th>Expected output</th>
<th>PCM guidelines ref. (edited in 2004)</th>
<th>EC supporting documents</th>
<th>Information requirements</th>
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<tbody>
<tr>
<td>Operational work plans – Progress reports – Reviews / study reports / Completion reports</td>
<td>Part. 1 Section 4.5. Implementation Quality criteria and standards (see Section 4.5.7) Activity/work programme schedules and resource/budget schedules (see Section 5) Risk management matrix (see Section 7.2.2) Checklists for planning short-visits, conducting interviews and managing regular review meetings (see Section 7) Guidance on promoting participation and using facilitation skills (See Section 8) Part 2 – Logframe matrix</td>
<td>Progress report formats (See Section 7) – including CRIS’s</td>
<td>Scope of the project Purpose Output Activities Resource requirements - budget</td>
</tr>
<tr>
<td>ToR</td>
<td>Terms of Reference (see Section 9)</td>
<td>Chap. 9, Prepare ToR; p. 129-130</td>
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</tbody>
</table>
2. What is the purpose of including a disability perspective during these phases?
- To monitor the results of projects which include a disability perspective
- To monitor the spending of budget allocated for including the perspectives of persons with disabilities
- To measure the effects of excluding a disability perspective in projects

3. Expected results of including a disability perspective during the implementation and monitoring phases
- There is an increased chance that project reorientations will address the rights of people living in poverty and persons with disabilities in particular
- Data collected through the monitoring system will give evidence on the impact/outcomes in your project on persons with disabilities
- The disability perspective will be included in the learning process conducted during the implementation phase (see figure 11 “Implementation: a learning process”, in PCM guidelines, p. 42). This will provide information about:
  - what the consequences are of not including a disability perspective in the project
  - what the possible difficulties are and keys for success for including a disability perspective in the project

4. Difficulties often encountered and keys to success
Here is a list of difficulties you may face at this stage and suggestions on how to overcome them.

4-1. The initial project does not specifically mention persons with disabilities
It can happen that the project, once identified and formulated, does not include a disability perspective. It might therefore be difficult to include a disability perspective in the implementation and monitoring phase. While it might be difficult for projects which require a low level of disability inclusion it is highly recommended to include a disability dimension during the implementation and monitoring of projects requiring a high level of disability inclusion. (See: ‘Different degrees of inclusion’). If a disability perspective is not included in projects where a high level of disability inclusion is indicated, persons with disabilities will be distinctly discriminated against.

Here are the possible options for disability inclusion at the implementation & monitoring phase:

If the project is at its inception
This period of project implementation covers activities like establishing working relationships with stakeholders; holding inception workshops(s); reviewing and revising the project plan; establishing M&E systems (see chapt. 4.5. Implementation & Monitoring phase, PCM Manual, p. 39).
- Invite stakeholders for disability inclusion to the project inception workshop
- Consult with them during the review and the revision of the project plan, in order to reduce, as much as possible, the possible negative impacts of persons with disabilities not being properly included in the planned project
- Establish the M&E system with consideration to persons with disability in the target area
  - Use ‘Different degrees of inclusion’ to ascertain what level of disability inclusion is required for the project.
  - See ‘Accessible meetings and events’ if you are inviting stakeholders for disability inclusion to a meeting

If the project is at its implementation phase
On an ongoing basis, activities at this point are related to: implementing activities and deploying resources accordingly; monitoring and reviewing progress, revising operational plans in light of experience, etc. Therefore, at this stage of the project the only possibility of including a disability perspective is through the mid-term reviews/external evaluation. In this case, the objective will be to assess if and to what extent persons with disabilities are excluded from the outputs of the project.
- Use the ‘Preparing terms of reference – at implementation stage’
5. What is the cost implication for including a disability perspective during this phase?

- To train and/or provide disability awareness to staff and other stakeholders involved in data collection
- To conduct focus group discussions with persons with disabilities (minimal cost)
- If you wish to have an overview of the disability situation in the given country, use ‘Framework for a disability analysis at country level’

If you plan to organise a workshop/working session and would like to invite stakeholders from the disability sector for a meeting and ensure their participation:

- Participation costs of participants- the same as for other civil society actors
- Organisation of the meeting in a physically accessible environment which only impacts on the choice of venue and should not involve extra cost. Consult with invitees with disabilities to help you locate an accessible venue if you are unaware of any.(See: ‘Accessibility guidelines and checklists on-line’)
- Consult with invitees with disabilities about which adaptations should be made to ensure they can attend and fully participate in the meeting.
- If you plan to achieve a high level of disability inclusion, you will need to cover costs to conduct specialised surveys and interviews with persons with disabilities and other stakeholders from the disability sector.
CASE STUDIES FOR IMPLEMENTATION AND MONITORING PHASE

Two case studies illustrate how people with disabilities have been included at the Implementation and Monitoring phase. One concerns the relief rehabilitation sector; the relates to the health sector.

Case Study: Relief Rehabilitation for people with disabilities under emergency situation in North Lebanon

The first case study shows how the Community Based Rehabilitation Association, a CBRA including staff members with disabilities, implemented a project aimed at providing emergency relief to people with disabilities in a Palestinian refugee camp in North Lebanon by using a community based approach.

Case Study: Including a disability perspective in the Health Sector, India

This case study gives an example of the inclusion people with disabilities at the implementation and monitoring phase in the Public Health Programme of the State Government of Gujarat in India. It has been initiated by Handicap International in cooperation with national authorities.
This case study shows how the Community Based Rehabilitation Association, a CBRA including staff members with disabilities, implemented a project aimed at providing emergency relief to people with disabilities in a Palestinian refugee camp in North Lebanon by using a community based approach.

Area: Middle East  
Sector: LRRD  
Phase of PCM illustrated: Implementation and Monitoring  
Implementer: Community based rehabilitation association

THE ORGANISATION
The Community Based Rehabilitation Association (CBRA), established in 1990, is a grass roots organization focusing its work on the rehabilitation of persons with disability with special emphasis on children with disabilities in Lebanon’s Palestinian refugee camps in the North of Lebanon Nahr el Bared camp and Beddawi camp. The CBRA has been partners with the Diakonia/NAD (Norwegian Association of Disabled) since more than a decade.

EMERGENCY RELIEF FOR PEOPLE WITH DISABILITIES IN REFUGEE CAMPS
Due to the armed conflict between the Lebanese army and a terrorist group in the name of Fatah al-Islam, the CBRA had to shift its work to relief and emergency aid to the estimated 40,000 Internally Displaced Persons (IDPs) who had left the conflict area, in particular the Nahr el-Bared camp (NBC). The CBRA immediately responded to the emergency in spite of the fact that most of the organization’s staff and volunteers were the
m selves displaced and had lost all their belongings. The CBRA started with the distribution of available rehabilitation aids in their stores and immediately partnered with a number of local and international non governmental organizations (NGOs) to provide persons with disabilities rehabilitation aids, diapers, first aid kits, corrective devices, urine bags, and bed pans in order to meet their immediate needs. Moreover, the CBRA team, consisting mostly of persons of disabilities and parents of children of disabilities, continued rehabilitation activities under the crisis situation by referring physically disabled persons to physiotherapy sessions as needed and providing training to family members in the displacement centres on feeding, positioning, communication, and adaptation of the physical environment, as well as modification and adaptation of devices.

Under the crisis situation, the CBRA’s focus expanded to the whole population and not only to persons with disabilities. With emergency funding support from SIDA, the CBRA partnered with Diakonia to support IDPs, providing emergency items such as clothes and beddings to most of the IDPs. CBRA could also provide psychosocial support and recreational activities for displaced women and children and raise awareness on children’s rights including children with disabilities and other vulnerable groups.

LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION

- Adopting a community based approach in the project implementation allowed for responding efficiently to the emergency situation.
- Being an organization of and for persons with disability, CBRA could quite easily locate persons with disabilities in the displacement centre and identify their needs.
- The success of the interventions was particularly due to the highly motivated staff members, themselves mostly IDPs, who provided various skills but also important additional support by their friends and relatives.

This is an abridged version of a case study written by Samar El Yassir and the Community Based Rehabilitation Association (CBRA)

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This case study gives an example of the inclusion of persons with disabilities at the implementation and monitoring phase in the Public Health system of the State Government of Gujarat in India. It has been initiated by Handicap International in cooperation with state authorities.

**Area:** Asia  
**Sector:** Health  
**Phase of PCM illustrated:** Implementation and Monitoring  
**Implementer:** NGO with state authorities

**DISABILITY INCLUSION IN PRIMARY HEALTH CARE**

Handicap International (HI) has supported the Department of Health and Family Welfare (DoHFW), Government of Gujarat, in India for the implementation of a State-wide project for prevention, early identification, intervention and rehabilitation of disability and its complications. Despite the Gujarat health system being better developed than other Indian states health systems, disability has largely been ignored in primary health care prior to the project as it was mainly seen as portfolio of Department of Social Justice and Empowerment. Consequently, early identification of disability, appropriate medical care and rehabilitation intervention did not represent a priority for health care providers.

As a result of a successful collaboration between HI and DoHFW following the earthquake in the region in the year 2001, a pilot project aimed at ensuring the inclusion of disability in public health system was designed. The implementation of the project stressed the need for developing a comprehensive strategy for reinforcing public health care centers and involving communities and organizations in disability prevention and rehabilitation. The pilot project is now extended to all districts of the state.

**TO BUILD CAPACITY OF PRIMARY HEALTH CARE PROVIDERS**

The main elements of the intervention were to build the capacity of primary health care providers for early identification and prevention of disability, including referral to appropriate rehabilitation services. Very importantly, the project aimed to build and consolidate linkages between preventive and curative streams of public health systems and to form networks between different stakeholders. We identified focal rehabilitation centres for each district that – once their capacities strengthened – could play a key coordination role in referring and following up people with disabilities. To raise awareness on disability in communities has been another important activity. As a result, access to and quality of rehabilitation services for people with disabilities have improved through raised awareness of communities and stakeholders, as well as built capacity of and improved networking between service providers.
Capacity building included training of health workers and establishing linkages between different organizations and promoting the participation of local disability organizations. In order to design and implement adequate interventions, HI used different methods such as Participatory Rural Appraisal and Community Based approaches to identify existing knowledge, attitudes and practices of community members regarding disability.

People with disabilities were also members in Core Coordination Committees (Public Health project planning & monitoring committees at the district level) to plan and implement activities. Being members, they contributed in planning and monitoring, by sharing the issues of persons with disabilities at the village level. Furthermore, persons with disabilities facilitated different training sessions of our disability and development module. Persons with disabilities and Disability Advocacy Group (DAG) members also took the lead in advocating issues of disability sector with Health, Social Justice and Empowerment and other government departments. Advocacy meetings at district and state level provided a platform for dialogue and discussion among different stakeholders i.e. government, non-governmental organizations, rehabilitation professionals, development professionals, persons with disabilities etc to examine closely the linkages between disability, public health and vulnerability reduction. Such initiatives resulted in increasing persons with disabilities participation and ownership in processes and brought more visibility of disability issues in the districts of Gujarat, while rendering government officials more sensitive towards disability.

**LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION**

- Monitoring of the project showed that health workers have started identification of persons with disabilities in their routine work and initiated linkages with existing health facilities.
- Disability issues are now on the agenda of Public health system at district and state level in Gujarat State.
- Need for collaborating with the government to empower the existing system rather than creating parallel structures with creation of sustainable structures that can be expanded to other areas.
- The State Institute of Health and Family Welfare (state run nodal training center) in Ahmedabad, Gujarat, has included early identification and prevention of disability in its health workers training program.
- Various disability issues were integrated in the districts health system through staff training and other measures. (E.g. The health workers have started filling up the column in family history register maintained at primary health center level.)
- The collected data have been shared with different public agencies for further use and the project has initiated an interaction between health workers and community based rehabilitation services.
- DoHFW has played a key role in organizing camps for issuing disability certificate for persons with disability (with a disability identity card) at block level throughout the state to empower persons with disability to avail the Government schemes. The Disability Advocacy Group (DAG) group members played different roles (support as well as pressure) during the camps organized by the Government.
- Sustainability can only be reached through a real and strong involvement of stakeholders at all levels, from the government to the community, including people with disabilities and/or their representatives at different stages of the project and permanent advocacy efforts led by them with HI support.

This text has been adapted from the Handicap International report on Disability Inclusion in Primary Health Care in Gujarat, India

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IMPLEMENTATION AND MONITORING: PRACTICAL TOOLS FOR INCLUDING A DISABILITY PERSPECTIVE

These tools are to assist you with the inclusion of a disability perspective at the implementation and monitoring phase. This section does not cover the information requirements as listed in the PCM, because all are determined (and can be found already) at the formulation stage.

1. To guide the EC task manager towards key disability questions at the implementation phase
This table presents the key questions and related available tools for including a disability perspective for each task in the implementation and monitoring phase as listed in the PCM guidelines.

Tool: ‘Guidance for task manager to include a disability perspective at the implementation phase’

This guidance is crucial for projects which require a high level of disability inclusion. To determine the level of disability inclusion required see ‘different degrees of inclusion’

2. To include a disability perspective within the Monitoring and Evaluation system
We present here a series of three tools that you can use depending on which level of disability inclusion you would like to reach.

The first tool refers to the lowest level of disability inclusion. It consists of monitoring and evaluating the implemented projects and see whether they exclude or have negative effects on persons with disabilities. This scenario would bring you valuable data at the end of your project, in terms of sustainability and impact of your activity.

Use: ‘Low level of disability inclusion required in M&E’

The second tool refers to the next level of disability inclusion. It consists of identifying the barriers to access faced by persons with disabilities (whether they are created by your project or not), and possible low-cost options for reorientation.

Use: ‘Medium degree of disability inclusion required in M&E’

The third tool is the highest level you may choose. In this case, you decide to integrate a disability perspective throughout your M&E system and your indicators. You may also choose this tool if you want to develop a body of evidence for the next phase of the on-going project or, if you are exploring new potential projects.

Use: ‘High level of disability inclusion required in M&E’
1. To prepare a disability-inclusive terms of reference- ready to use formats
   Use: ‘Preparing terms of reference– at implementation phase’

2. To monitor the progress of disability inclusion in the project
   All the tools presented so far are about the monitoring and evaluation of activities implemented while a project is in its implementation phase. But how can the process of including a disability perspective be monitored throughout the overall project cycle? This tool is specifically designed to provide you a grid of indicators that will help you monitor the inclusion of a disability perspective.
   Use: ‘Monitoring the progress of including a disability perspective’
The evaluation phase of the project cycle answers the question: “Were planned benefits achieved, will they be sustained, and what lessons have been learned?”

This section briefly presents:
1. What the evaluation phase is about
2. The purpose of including a disability perspective at this phase
3. The expected results of including a disability perspective
4. The difficulties often encountered and the keys to success
5. The possible cost implications of including a disability perspective
   ■ Case studies
   ■ Practical tools (described briefly here and available online: www.make-development-inclusive.org)

2. What is the purpose of including a disability perspective during the evaluation phase?
   ■ To evaluate the results of projects which included a disability perspective
   ■ To evaluate the spending of budget allocated to disability inclusion
   ■ To measure the effects of not including a disability perspective in projects where disability should have been included
   ■ To generate ideas for future disability-inclusive or disability specific projects
3. Expected results of including a disability perspective at this phase

- You will know if including a disability perspective was relevant to the project and have a measurement of how much and how well the perspectives of persons with disabilities have been included.
- You will know whether persons with disabilities have been excluded from the project processes and outputs.
- You will know what future actions or projects should be undertaken to promote the inclusion of persons with disabilities within EC supported programmes.

4. Difficulties often encountered and key to success

Here is a list of difficulties you may face at this stage, and suggestions on how to overcome these difficulties.

4-1. To convince authorities, stakeholders and EC managers that it is worthwhile to include a disability perspective in the project evaluation

Often development professionals are unaware of the need to include a disability perspective in poverty alleviation strategies and projects.

- Explore whether the country has signed the UNCRPD. This will reinforce their responsibility to include disability; for an up to date list of signatories see http://www.un.org/disabilities/countries.asp?navid=12&pid=166.
- Share the information contained in Part I of this manual with them. This gives evidence of the importance of including a disability perspective in development projects.
- Explain what including a disability perspective would contribute to the evaluation, in terms of relevance; effectiveness, impact and sustainability (see above).
- Explain that enlargement of the scope of evaluation could also bring some recommendations for the future.

5. What is the cost implication for including a disability perspective at this phase?

During the evaluation phase you may need to only slightly adapt the usual data collection tools and methods, with minimal extra cost. Costs include:

- To call stakeholders from the disability sector for a meeting and ensure their participation in the evaluation process on an equal basis with others (see ‘Accessible meetings or events’):
  - Participation costs of participants- the same as for other civil society actors.
  - Organisation of the meeting in a physically accessible environment which only impacts on the choice of venue and should not involve extra cost (see tool ‘Accessibility guidelines and checklists on-line’).
  - Consult with invitees with disabilities about adaptations which may need to be made for them to attend and fully participate in the meeting.
- To conduct a disability analysis, if an overall review of disability in the given country is needed. (See ‘Framework for disability analysis at country level’).
Two cases studies, one from the water and sanitation sector, the other concerning HIV&AIDS, show how people with disabilities can be included in the evaluation phase.

Case Study: Including persons with disabilities in Water and Sanitation Project: Mali

This case study is an example of a pilot project, including a follow up evaluation and further research on water and sanitation facilities for people with disabilities. It shows how people with disabilities have been included in both the implementation and evaluation stages of a pilot project. WaterAid has used the lessons learned for mainstreaming disability in all its water and sanitation projects.

Case Study: Promoting a disability perspective in Uganda’s HIV/AIDS National response

This case study from Uganda illustrates how the National Union of Disabled Persons in Uganda (NUDIPU) promoted disability inclusion in the national HIV/AIDS programmes.
The following case study is an example of a pilot project, including a follow up evaluation and further research on water and sanitation facilities for people with disabilities. It shows how people with disabilities have been included in both the implementation and evaluation stages of a pilot project. WaterAid has used the lessons learned for mainstreaming disability in all its water and sanitation projects.

THE CONTEXT

In 2006 a pilot project in the rural village of Tienfala in Mali, funded by Sightsavers International, provided water and sanitation (WATSAN) facilities for people who are blind. In 2007 a study on needs and barriers that people with disabilities in rural Mali face has been conducted including an evaluation of the Tienfala pilot project. WaterAid Mali (WAM) are now planning to include people with disabilities in their work in the country.

Statistics from 1999 (Diawara 2005) estimate that persons with disabilities make up 10-19% of the population in Mali. However, national regulations do not systematically take them into account and Disabled Peoples’ Organisations lack political influence and resources. Persons with disabilities have also been given little consideration in the provision of WATSAN facilities.

LOW COST ADAPTATION FOR AN INCREASED ACCESSIBILITY

The pilot project in Tienfala provided a new well for blind users in a garden compound. The old large open well had a low wall that made collecting water dangerous for users. The new well is surrounded by gravel to aid orientation, and includes a high wall for safety and support. The wall includes a lower section with a ramped access that would be suitable for wheelchair users and children.

WHEN EVALUATION AND A PILOT PROJECT BRING LESSONS

However, the pulley in use was difficult for the blind users. With a better quality pulley users would not have the same problem. Raised concrete seats affixed to domed slabs were installed free of charge for blind users. The seats provide comfort, support and hygiene; where in the past users would touch to feel for the latrine hole. The seat is easy to locate and keep clean. However, the evaluation showed that accessibility issues
can remain, in stand-alone provision, with problems such as slippery and steep surfaces. Furthermore, there is great room for experimenting with other cheaper building materials. Audio tools for hygiene promotion were developed to allow WAM to include people who are blind. The project gave both the financial benefit of improved access to water for garden plot crops, and the social benefits of a sense of increased integration and self-esteem for the users. Where in the case for sanitation people’s self-dignity has improved, in not needing to rely on other family members for assistance.

**PARTICIPATION OF PERSONS WITH DISABILITIES IN THE PROCESS OF RESEARCH**

In meeting with wheelchair users and people using supports such as crutches in a second rural location, a number of key aspects of barriers to WATSAN access were identified. Persons with disabilities were involved in the research team, aiding the process of consultation.

A number of ideas and suggestions from the users were discussed and tried out in practice for sanitation where possible. It was found that transport of water is a key issue for disabled people, preventing the collection of water in many cases. It appeared that access to and use of water and sanitation facilities could be improved by small changes in design, or through the provision of adaptations for individuals. For example, raised wooden seats for use over the latrine and for bathing, were produced, which could be made at low cost and did not interfere with other users. A support bar was also produced.

Discussion produced a large number of ideas that can now be used and tested as WAM continue to include disability in their country-wide work.

**LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION**

- The research shows that the needs of persons with disabilities can be met within mainstream programs by small changes to design. Conducting research and evaluating the pilot project was important to ensure that ideas on paper work in practice.
- A more participatory approach, to include persons with disabilities early on in projects, is important and includes an understanding of the social-cultural barriers as well as the technical ones. For sanitation and water transport, strong collaboration with DPOs and a platform for creating and sharing ideas at community level is required.
- Future collaboration between the disability and WATSAN sector will be critical for ensuring the full inclusion of persons with disabilities and other vulnerable groups in water and sanitation projects.

*This is an abridged version of a case study written by Tom Russell and WaterAid Mali, Oct. 2007*

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This case study from Uganda illustrates how the National Union of Disabled Persons in Uganda (NUDIPU) promoted disability inclusion in the national HIV/AIDS programmes.

THE NATIONAL CONTEXT
Uganda is inarguably the most cited success story in sub-Saharan Africa in terms of fighting the HIV/AIDS epidemic, partly due to responsible political leadership and a well-coordinated national and local response. However, HIV/AIDS is still a major cause of disease and mortality especially for young adults, putting additional stress on the already strained health system. HIV infection significantly varies according to factors such as gender, age and place of residence.

The national response to HIV/AIDS has resulted in several policies and institutions. Currently Uganda’s response and its national priorities are guided by the Revised National Strategic Framework (NSF) for HIV/AIDS Activities in Uganda 2003/04-2005/06 and 2007/2012. To make the fight against HIV/AIDS more effective and informed, a National Monitoring & Evaluation (M&E) Framework was put in place by 2003 designed to measure and evaluate progress in the implementation of the NSF.¹

PERSONS WITH DISABILITIES ARE AT INCREASED RISK
However, persons with disabilities had not been given specific attention under the developed policies and frameworks. Persons with disabilities are at increased risk of HIV infection and are less likely to access HIV prevention, care and treatment services than their non-disabled counterparts due to low levels of HIV/AIDS awareness, vulnerability to sexual abuse, ignorance or discriminatory attitudes among health workers and educators, inaccessible service facilities, and lack of institutional and human capacity of the disability movement in Uganda to address HIV/AIDS.

MAINSTREAMING DISABILITY IN UGANDA’S HIV/AIDS POLICIES
The National Union of Disabled Persons of Uganda (NUDIPU), an indigenous umbrella NGO of people with disabilities, is now implementing a three year project on promoting and mainstreaming a disability perspective into Uganda’s HIV/AIDS National response. In partnership with other Disabled People’s

Organizations (DPOs) in Uganda the project is piloted in three districts of Gulu, Soroti and Masaka. It is funded by DANIDA through the Danish Council of Disabled People’s Organizations (DSI). One outcome of the project was to initiate a national forum through which issues of major concern for persons with disabilities are discussed and harmonized (Disability Stakeholders’ HIV/AIDS Committee). This forum acts as a unifying factor and the planning board for the disability fraternity in Uganda.

RESULTS
Not only are people with disabilities the project target group but the entire project has been planned, managed, monitored and evaluated by persons with disabilities, relates and their representatives. The implementation is based on a partnership strategy involving already existing disability organisations at the grassroots levels and those operating at the district levels.

The mid-term evaluation demonstrates that persons with disabilities have been able to influence inclusion of their issues and needs in the current HIV/AIDS National Strategic Plan. However, the challenge now awaits in implementation. The project has also succeeded in bringing together all DPOs and people with disabilities in Uganda in the fight against HIV/AIDS. There has been significant unity achieved despite the diverse nature of disability needs and concerns. Networking and collations with other CSOs has been a major boost in championing for people with disabilities concerns in the social – economic development perspectives. Consequently, the political establishment in Uganda is beginning to comprehend the need to include and plan for people with disabilities in all development processes.

LESSONS LEARNED AND HOW THIS IS AN EXAMPLE FOR DISABILITY INCLUSION

- Participation of persons with disabilities and their representative organisations at all stages develops ownership, contributes to sustainability, ensures relevance and promotes the empowerment of persons with disabilities
- Championing disability concerns at national level in all development processes could be through:
  - The process of mainstreaming disability in the HIV/AIDS National Response
  - Networking and collations among DPOs and CSOs.

This is an abridged version of a case study written by Mwesigwa Martin Babu (NUDIPU)

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These tools are to be used in combination with the Concepts and Guiding Principles found in Part I and the basic knowledge provided in ‘Evaluation: How to include a disability perspective’.

This section does not cover the information requirements as listed in the PCM. This section rather focuses on the inclusion of a disability perspective in the ‘terms of references’.

1. To guide the EC task manager towards key disability questions at the evaluation phase

This table presents the key questions and related available tools for including a disability perspective for each task in the evaluation phase as listed in the PCM guidelines.

Tool: ‘Guidance for task manager to include a disability perspective at the evaluation phase’

2. To prepare terms of reference including a disability perspective

Use: ‘Preparing terms of reference to include a disability perspective– at evaluation phase’

3. To include the perspectives of persons with disabilities within the Monitoring and Evaluation system see ‘Implementation and Monitoring: Practical tools for including a disability perspective’
Different categories of downloadable and web-based tools are presented:
1. Disability-inclusive project planning and management tools for general use
2. Disability-inclusive project management tools based on EC guidelines
3. Case studies
4. Tools for including a disability perspective, listed per sector

Some have been developed by authors involved in drafting this manual and others adapted from the works of many authors and experts.

1. TOOLS FOR DISABILITY-INCLUSIVE PROJECT MANAGEMENT FOR GENERAL USE
These tools have been adapted for the PCM guidelines of the EC but could be applied or adapted for any project management situation, when a disability perspective is being considered.
- Who are the stakeholders for disability inclusion?
- How to find DPOs on the web
- Rapid Disability Analysis
- Different degrees of inclusion
- Framework for a disability analysis at the country level
- Where to find data on disability
- Budgeting the inclusion of a disability perspective
- Accessible meetings or events
- Accessibility guidelines and checklists on-line
- Planning for all
- How are international donors addressing disability?
- High level of disability inclusion required in M&E
- Medium degree of disability inclusion required in M&E
- Low level of disability inclusion required in M&E
- Monitoring the progress of including a disability perspective

2. DISABILITY-INCLUSIVE PROJECT MANAGEMENT TOOLS BASED ON EC PROGRAMMING GUIDELINES
EC Supporting documents revised for disability inclusion
These EC supporting documents are the official frameworks that E.C. operational staff have to present to the Quality Support Group. Decisions are made based on these documents. Each of these adapted EC supporting documents presents a “disability entry point” that show the user where and how a disability perspective could be included. By clicking on the disability entry point, the user will get the information s/he needs to include a disability aspect at that point.
- Action fiche for [beneficiary country / region / Theme]
- CSP Model including a disability perspective – Annex 1A
- Financing proposal
- Identification fiche for a project approach
- How to explore options for the inclusion of a disability perspective in a CSP

Preparation of reference including a disability perspective
Based on those provided in the PCM manual, guidance for preparing terms of reference including a disability perspective is presented here. Future users can re-use these tools and adapt them to their needs, as they wish. The following are available:
- Preparation of reference at Identification phase
- Preparation of reference at Formulation phase
- Preparation of Reference at Implementation phase
- Preparation of Reference at Evaluation phase

Guidance for the task manager for each stage of the project cycle
- Guidance for the task manager to include a disability perspective at the programming phase
- Guidance for the task manager to include a disability perspective at the identification phase
- Guidance for the task manager to include a disability perspective at the formulation phase
- Guidance for the task manager to include a disability perspective at the implementation phase
- Guidance for the task manager to include a disability perspective at the evaluation phase
3. CASE STUDIES
To demonstrate the Twin Track approach
- ‘Enhanced quality learning project’ in Somaliland and Puntland

Case studies for the Programming phase:
- Inclusion of the perspectives of persons with disabilities in the programming of the 10th EDF in Ghana
- Including persons with disabilities in National Statistics in Morocco

Case studies for the identification and Formulation phase:
- Promoting inclusive education in Kenya
- Inclusive education at national level in Papua New Guinea
- Making transport in the Philippines accessible for persons with disabilities
- Support to DPOs in Madagascar and the Balkans

Case studies for the implementation and Monitoring phase:
- Relief and Rehabilitation for people with disabilities during emergency situation in North Lebanon
- Including a disability perspective in the Health Sector in India

Case studies for the Evaluation phase:
- Including a disability perspective in Water and Sanitation projects Mali
- Promoting a disability perspective in Uganda’s HIV/AIDS national response

4. TOOLS FOR INCLUDING A DISABILITY PERSPECTIVE, LISTED PER SECTOR

Education sector
- Disability sensitive indicators Education sector
- Justifications to support inclusion of a disability perspective Education sector
- Programming Guide Education sector
- Case study: ‘Enhanced quality learning project’ in Somaliland and Puntland
- Case study: Promoting inclusive education in Kenya
- Case study: Inclusive education at national level in Papua New Guinea

Health Sector
- Disability sensitive indicators Health sector
- Justifications to support inclusion of a disability perspective Health sector
- Programming Guide Health sector
- Case study: Including a disability perspective in the Health Sector in India

HIV/AIDS
- Disability sensitive indicators HIV AIDS
- Justifications to support inclusion of a disability perspective HIV AIDS
- Programming Guide HIV AIDS cross cutting issues
- Case Study: ‘Promoting a disability perspective in Uganda’s HIV/AIDS national response’

Water and Sanitation
- Disability sensitive indicators Water and Sanitation sector
- Justifications to support inclusion of a disability perspective Water and Sanitation
- Programming Guide Water and sanitation sector
- Case Study: ‘Including a disability perspective in Water and Sanitation projects Mali’

Urban Development
- Disability sensitive indicators Urban Development sector
- Justifications to support inclusion of a disability perspective Urban Development
- Accessibility guidelines and checklists on-line
- Programming Guide Urban Development sector
- Case study: Making transport in the Philippines accessible for persons with disabilities

Support to Non-state actors
- Disability sensitive indicators Support to non-state actors
- Programming Guide Support to non state actors
- Specific support to the stakeholders for disability inclusion
- Case study: Support to DPOs in Madagascar and the Balkans
- Case study: Inclusion of the perspectives of persons with disabilities in the programming of the 10th EDF in Ghana

Gender
- Justifications to support inclusion of a disability perspective Gender issues
- Programming Guide Gender cross cutting issues
- Disability sensitive indicators Gender issues

Human Rights
- Justifications to support inclusion of a disability perspective Human Rights
- Programming Guide Democracy and Human Rights
- Case Study: Support to DPOs in Madagascar and the Balkans
MAKE DEVELOPMENT INCLUSIVE

HOW TO INCLUDE THE PERSPECTIVES OF PERSON WITH DISABILITIES IN THE PROJECT CYCLE MANAGEMENT GUIDELINES OF THE EC

A PRACTICAL GUIDE

This manual is part of the project “Disability mainstreaming in Development Cooperation”, supported by DG Employment and Social Affairs of the European Commission. The contents of this manual are the sole responsibility of CBM