Gender analytical tools for monitoring and evaluation

Joy Clancy

This article is based on one[1] that appeared in Boiling Point[2] 55: Monitoring and Evaluation (June 2008 edition, pages 29-38). We are very grateful to Dr Joy Clancy and the HEDON Household Energy Network for permission to include it in this issue of ENERGIA News.

The article first presents a fictitious household energy project dilemma, followed by the response by Joy Clancy to the project team on how to address the dilemma by taking a gender perspective.

Case study scenario

The meeting earlier that week had brought some very good news for Savita and the rest of the BALA team. Having spent much of the previous year assessing whether a new type of efficient wood burning stove was suitable for use in their area, they had just managed to secure some significant funding with which to scale up the project. However, now she was sitting at her desk wondering what to do next, the scale of the task ahead was suddenly becoming apparent…

The funders had been quite specific: they would give support for an initial three-year period with the requirement that 5,000 stoves were to be produced in the first year, 10,000 in the next and 20,000 in the third year. The money would come from a variety of sources, a local Government agency, an international NGO and a private company, and each one had a different agenda. They had all specified what they wanted from the programme, and Savita had a list of targets and indicators on a range of health, social, environmental, technical and economic issues. The whole point of the project was to see if numbers could be increased, in terms of both demand and capacity (including manufacturing, engagement of local financial institutions, support and distribution networks). If successful, the scheme would then receive increased funding to scale up and roll out the programme to other areas of the country.

Last year's pilot project had gone well, with over 200 households taking part in a field study as well as the stove undergoing numerous performance and safety tests. The stove design needed a bit more work to make it acceptable to users, and the manufacturers seemed capable of producing the quantities they needed, but these were not Savita's main concerns.
She would need to work closely with her own project team as well as other local organisations, and then she had to satisfy the many demands of the funders as well as her own organisation's management. How was she going to design and implement a programme of this size? With all the day-to-day issues she would face, how would she monitor overall progress and check that the work was going as planned?

How were they going to tell what users thought of the stove and how often they used it, and what about marketing and after-sales – she has been involved with many of these issues before but never all at once! Savita knew she had to develop a Monitoring and Evaluation (M&E) system but was not sure where to start. In previous work, she had tried to develop one but, being honest, this had always been a last minute thing and now she was beginning to feel out of her depth…
So in terms of M&E, how should Savita run the various stages of the programme so that everyone is kept happy and how does she prove that the various objectives of the project are being achieved?

Disclaimer: The story presented in this case study is fictitious and, as such, any characters and organisations within it are not based on real life.

Case study response by Dr Joy Clancy

Savita would be wise to include gender analysis as part of her approach to monitoring and evaluating her stoves project. She might be surprised to read this because in a household stoves project the target group is usually women, and gender is about men and women. So what has gender got to do with stoves? Well, quite a lot actually.

There is plenty of evidence to show that when household equipment is bought, even equipment for the kitchen, men are involved in the decision-making process (see, for example, Dutta, 1997). Therefore, the men within the household need to be convinced of the benefits of buying the BALA stove. Often men and women will also have different selection criteria for a stove, for example, women might want one that is easy to light and gives a clean kitchen whereas men may want a stove that delivers quick meals. So, the BALA stove will need to meet both women's and men's needs. Another reason for including gender is that it will probably be a requirement of the international NGO, particularly if they are using donor funds. Gender could be included as one of the social indicators that Savita has to measure. However, there are also sound practical reasons for paying attention to gender issues. There is a growing belief that ignoring gender in projects is a contributory factor to project failure (Fong and Bhusan, 1996), while paying attention to gender can lead to a better fit of project interventions with the intended beneficiaries and this creates greater management efficiency in terms of delivery (Skutsch, 1998). In other words, by including gender analysis in her monitoring and evaluation methodology toolbox, Savita will increase the chances of meeting her project targets.

Help is at hand for Savita: the Department of Technology and Sustainable Development (TSD, University of Twente) and ENERGIA have developed gender analytical tools specifically for use in the energy sector. These tools can easily be combined with existing procedures and, in particular, they fit into the project cycle. They differ from other gender analytical tools in two ways. Firstly, they make explicit the 'gender goals' of a project, i.e. they identify which gender issues will be addressed, and, secondly, they assess the gender capacity of organisations involved in project delivery (Skutsch, 2004).
The reasons for the various stakeholders getting involved in a project, and the outcomes they expect, vary. For example, a typical stoves project, such as BALA's, usually aims to improve women's lives. However, do all stakeholders have the same expectations about these improvements? BALA might be aiming at improving women's health (reduced smoke) and saving women's time in fuelwood collection (reduced drudgery). In other words, the focus is on women's welfare.

This 'gender goal' is also likely to be held by the international NGO, which quite possibly will also be interested in women's empowerment being a result of the project. The NGO may be less clear as to what they actually mean by "empowerment" – economic? social? The gender goal of women's empowerment may be viewed with suspicion by some stakeholders and can lead to resistance to projects. It is better to be clear and realistic about the gender goals that have been set by the project, so that the target is visible and an evaluation of the project can be made on the basis of agreed and accepted goals. All the stakeholders in the project should also be clear about the goals. Reaching agreement can help overcome any resistance and avoid disappointments.

BALA also needs to assess whether, as an organisation, it is equipped to deal with a gender approach to project implementation. For example, are its staff gender-sensitive to cultural issues in the region where the stoves are to be promoted (e.g. are women able to attend training sessions at night or at some distance from home?).

ENERGIA's gender-analysis tools consist of a framework with a number of steps. Within each step, there are questions that need to be asked in a logical order, and the required data can be gathered using a number of methods, including desk studies and participatory approaches. The questions are not meant to be prescriptive and can be adjusted to suit the context. The data collected are then used to complete a number of tables which can then be used to analyse the data, to aid decision-making and to help identify areas requiring remedial action (for example, increasing women's participation in stove design).

The tools were designed for use in the planning phase of energy projects, although they have also been shown to work for energy project evaluation (Clancy et al., 2007). ENERGIA members who have used the tools report that they are easy to work with. There is an easy-to-follow manual that BALA can use, and it is free to download . The tools provide comprehensive data, although they do need to be adapted for a particular context either to prevent the collection of redundant data, or to ensure the collection of sufficient context-specific data. So, BALA has some work to do, but Table 1 *(see page 16)* gives some suggestions.

[1] *The article entitled Boiling Point 55: Monitoring and evaluation case study scenario can be found at www.hedon.info/QUJA*

[2] *Boiling Point is a practitioner's journal for those working with household energy and stoves. It deals with technical, social, financial and environmental issues, and aims to improve the quality of life for poor communities living in the developing world. Boiling Point is published under the HEDON Household Energy Network (www.hedon.info). HEDON is an international forum dedicated to improving social, economic and environmental conditions in the South through the promotion of local, national, regional and international initiatives in the household energy sector.*

An improved stove in an improved, clean kitchen in India with extra shelves to store the pots and pans. Apart from being able to cook smoke-free, many women appreciate the cleanliness and tidyness of an improved kitchen layout. (Photo: Willeke Parmentier, ETC Energy)

A woman demonstrating improved stoves on a mobile stove tour in rural India. Many women are expected to be reached when touring with the colourful tractor with sound system. (Photo: Willeke Parmentier, ETC Energy)

Questions to be asked	Source of data	Work plan (for data collection)
Identifying stakeholders and gender goals		
Which stakeholders?	Stakeholders should include all agencies involved (such as the local government agency, the international NGO, stove producers) and target households, (men and women should be considered as separate stakeholder groups)	Preparation phase and fieldwork planning
Gender capacity of agencies?	Assess whether BALA is capable of responding to the gender issues in a positive manner. May also consider assessing stove producers.	
What obstacles?	Take advice from key informants regarding the local situation. Be prepared to hold different meetings at different times for men and women.	
What stakeholder goals?	Separate focus group meetings for men and women from the target communities to identify motivations for buying a new stove. Other stakeholders' goals can be found from analysing documents or from the discussions around what indicators to use (see next question).	Consultation and orientation phase
What indicators?	Indicators can be developed by BALA alone or with the stakeholders. The latter approach can help clarify the gender goals of the stakeholders.	
Genderised context definition		
What are the selection criteria for a stove?	This is a market analysis based on gender-disaggregated data. BALA should carry out a survey of a representative sample of households – with men and women interviewed separately. The data collected form a reference source that can later be expanded in focus group sessions to provide feedback on stove acceptance.	Sample survey using detailed interviews with households
Who is responsible for making decisions about stove and fuel purchases?	This information can be collected in the household survey and followed up in the focus group sessions.	
What priority is a new stove within the household?	This information can be collected in the household survey and followed up in the focus group sessions.	
Genderised appraisal of stove		
Does the stove meet the criteria of men and women?	The answer to this question allows for adjustment in stove design and marketing approaches.	Focus group of users and non-users.
Has the project met the gender goals?	Assessment by the project design team.	Final step in the appraisal.

Table 1 Gender analysis of BALA Stoves Project

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