

Case study

Each Boiling Point case study presents a fictional household energy dilemma with advice from international experts

Boiling Point 55: Monitoring and evaluation 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 last 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. But now she was sitting at her desk wondering what to do next, with the scale of the task ahead suddenly becoming apparent...

The funders had been quite specific; they would give support for an initial 3 year period with the requirement that 5000 stoves were produced in the first year, 10,000 the next and 20,000 in the third year. The money was coming 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 she had a list of targets and indicators on a variety of health, social, environmental, technical and economic issues. The whole point of the project was to see if an increase in numbers was possible, in terms of both demand and capacity (including manufacturing, engagement of local financial institutions, support and distribution networks, etc). If successful, the scheme would then receive increased funding to scale up further 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 weren't Savita's main concerns.

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.

She would need to work closely with her own project team as well as other local organisations, and then she also 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 also 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 system but wasn't 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 delivered?

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Case study response

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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. But 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). So the men within the household need to be convinced about 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 cleaner kitchen whereas men may want a stove that gives quicker 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 Savita has to measure. However, there are also sound practical reasons for paying attention to gender issues. There is a growing acceptance of the fact 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 thus create greater management efficiency in terms of delivery (Skutsch, 1998). In other words by including gender analysis in her monitoring and evaluation methodology toolbox, Savita increases the chances of meeting her project target.

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, 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' for a project, i.e. identifying which gender issues will be addressed, and secondly they assess the gender capacity of organisations involved in project delivery (Skutsch 2004).

The reasons for different stakeholders to get involved in a project, and the outcomes they expect, vary. For example, a typical stoves project, such as BALA's, usually aims to bring improvements to 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 aim is 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 as a result of the project. The NGO may be less clear what they mean by "empowerment" – economic? social? The gender goal of women's empowerment can be viewed with suspicion by some stakeholders and can lead to resistance to projects. It is better to be clear and realistic about what gender goals have been set by the project, so that the target is visible and 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 or not, as an organisation, it is equipped to deal with a gender approach to project implementation, for example that staff are gender sensitive to cultural issues in the region where stoves are to be promoted (i.e. 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 is a set of questions that need to be asked in a logical order, and the data can be gathered by 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 is 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 for remedial action (for example, increasing women's participation in stove design).

The tools were designed for the planning phase of energy projects, although they have been shown to work for energy project evaluation (Clancy et al, 2007). ENERGIA members who have used the tools report them as easy to work with. There is an easy to follow manual which BALA can use and it's free to download via the @HEDON link at the end of this article. The tools provide comprehensive data, although they do need to be adapted for the particular context either to prevent the collection of redundant data, or to ensure the collection of more context specific data. So BALA has some work to do but Table 1 gives some suggestions.



Figure 1. A focus group meeting in the Philippines (Photo: The Author)

References

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Profile of the author

Dr Joy Clancy is a Reader/Associate Professor in technology transfer with the Technology and Sustainable Development Department at the University of Twente in the Netherlands. Her first degree is in Chemistry (University of London) and her PhD was on alcohol fuels in stationary engines (University of Reading). She joined the University of Twente in 1989, since when her research has focused on small scale energy systems for developing countries, including the technology transfer process and the role that energy plays as an input for small businesses and the potential the opening of energy markets offers entrepreneurs through the provision of a new infrastructure service. Gender and energy has been an important factor addressed in this research. Dr Clancy is a founder member and a technical advisor to ENERGIA.

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Table 1 Gender analysis of BALA Stoves Project

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 local Government agency, international NGO, stove producers) and target households, (men and women should be considered separate stakeholder groups)	Preparation phase and fieldwork planning
Gender capacity of agencies?	Assess whether BALA is capable of responding to 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 target communities to identify motivation for buying a new stove. Other stakeholders' goals can be found from analysing documents or from the discussions around what indicators (see next question).	Consultation and orientation phase
What indicators?	Indicators can be developed by BALA alone or with stakeholders. The latter approach can help clarify the gender goals of the stakeholders.	
Genderised context definition		
What are the criteria of selection 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 forms a reference source that can later be expanded in focus group sessions for feeding back on stove acceptance.	Sample survey using detailed interviews with households
Who is responsible for decision making about stove and fuel purchase?	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.