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Training Manual

Gender Mainstreaming in Energy Projects in the Pacific

Basic Materials that need to be understood by the Trainer.

The 1976 Convention for the Elimination of Discrimination Against Women (CEDAW) and the Beijing Platform of Action approved at the Fourth World Conference on Women in 1996, which have influenced many donors and governments, who have mandated gender equality goals for programs and projects. The Pacific Platform of Action (PPA) which guides the work on gender in the Pacific Islands region and the outcomes of the Regional Women's Triennial which is organised by the Secretariat of the Pacific Community every 4 years are some guiding documents. These should be read together with Basic Human rights documents.

Module 1: Understanding Gender

Learning Objectives: After completing the session all the participants should be able to

- Explain the difference between Gender and Sex
- Understand Gender Concepts and Definitions
- Understand social and cultural context of gender work in a given site.
- Apply Gender concepts to the different projects that are developed through the Gender Energy programme.
- Discuss and work on the division of labour exercise- also including a time use approach.

Module 2: Gender Mainstreaming

Learning Objectives: After completing the session all the participants should be able to

- Understand and define Gender Mainstreaming
- Explain the key aspects of Gender Mainstreaming
- Explain the difference between mainstreaming and the 'women only' approach to energy project planning
- Identify priority areas for mainstreaming
- Explore existing tools and systems which can enhance gender mainstreaming
- Explain why gender mainstreaming is important to Energy and Climate Change projects in the Pacific
- Discuss and work on a seasonal calendar to identify other areas of work, set targets and have an annual program developed.

Module 3: The process of Gender Mainstreaming in Energy projects

Learning Objectives: After completing the session all the participants should be able to

- Understanding the Stakeholder exercises- to identify various government and non-government stakeholders and identify their links to the project,
- Explain the building block approach and other approaches to gender mainstreaming in projects
- Apply these approaches to an ongoing in country project- Participatory learning tools, gender analysis/assessments of projects, identifying entry points for women on these projects.

Module 1: Understanding Gender

Learning Objectives: After completing the session all the participants should be able to

- Explain the difference between Gender and Sex
- Understand Gender Concepts and Definitions
- Identify gender roles in communities and time use comparisons (men and women)
- Apply Gender concepts to their own societies/communities

What is Gender?

A concept related to the tasks, roles, obligations and privileges in public and private life of women and men as well as the relationships between them. “Gender” is not the same as “sex”. The latter is determined by biology, whereas the former is shaped by society.

Introductory Activity:

When conducting training in the area of Gender & Energy in the Pacific, it is important to recognise that participants would have been exposed to different discussions on gender and women’s human rights and a number of participants may not see the relevance of Gender to the work on Energy. In order to address misconceptions and to allow all of the participants to share their understanding of gender, the following introductory activity could be conducted.

Objective of Activity

- To review participants understanding of gender
- Personal assumptions and view of gender
- To clarify definition of gender versus sex;
- To recognise gender differences in society and start to identify gender roles in a particular society with specific emphasis on energy.

Each of the participant to come up with definitions of gender and sex and what is the basic difference. Some may come up with the correct definitions and these can be used to start and build a general definition.

Gender

- Socially constructed
- More associated with people’s perceptions of gender roles.
- The different value system for men and women.
- Roles that men and women play both at households and at village or community level
- Gender roles are changeable

Sex

- Biological
- Determined at birth
- Two types, either man or woman
- Very difficult to change

Gender Concepts & Definitions

- **Gender equality** means that the different behavior, aspirations and needs of women and men are considered, valued and favoured equally. It does not mean that women and men have to become the same, but that their rights, responsibilities and opportunities will not depend on whether they are born male or female.
- **Gender equity** means fairness of treatment for women and men, **according to their respective needs**. This may include equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations and opportunities.
- **Gender Roles** – Roles assigned to men and women by society. Gender roles shape our identity, determining how we are perceived, how we are expected to think and act as women and men
- **Gender Relations** – Like Gender roles are socially determined and are influenced by the same social, cultural, political and economic expectations. Gender relations are shaped by a range of institutions such as the family and legal systems. Gender relations exist both within the households (private sphere) as well as within the community and workplace (public sphere). An analysis of a given situation based on gender relations differs from one based on gender roles because it gives more focus to power relations and its connections between women's and men's lives.
- **Gender norms** – **This is how** men and women are expected to behave within their gender roles within a given society.
- **Gender aware** – When people start to see the different gender roles and practices that restrict or enhance women and men's roles.
- **Gender Blind** – The lack of recognition of gender differentials. Usually people in communities are viewed as including men and women when there is no specific gender targeted activity.
- **Gender sensitive** – Recognizing and being sensitive to the differences and inequities between women's and men's needs, roles, interests, needs, responsibilities and identities.
- **Gender neutral** - Interventions which does not specifically spell out gender specific roles and is neutral in this regard. Energy interventions can target both men and women equally so both men and women are involved in decision making. .
- **Gender imbalance**: Unequal distribution of women's and men's access to and control of resources, services and benefits and their participation in activities related production and social reproduction.
- **Gender mainstreaming** an approach that ensures that gender issues and concerns are included in all planning, policy-making, resource distribution, training, implementation and monitoring activities. and that all policy-makers are aware of the needs of women and men in relation to their roles and responsibilities
- **Gender inequality**: biases against men or women determined by their gender roles, such that women's and men's participation in different social, political and economic sectors, and in development in general lead to unequal outcomes and benefits.
- **Gender gaps**: Gender gap is the observable (and often measurable) gap between women and men on some important socio-economic indicator (e.g. ownership of property, access to land, enrolment at school, access to efficient cooking stoves,), which is seen to be unjust, and therefore presents the clear empirical evidence of the existence of a gender issue
- **WID** – before the emphasis on gender the earlier period of women's work focused on trying to get women involved in development without considering the roles of women at the households and the impacts on the gender relations.

- **GAD-** After this period started the work on gender and development promoted which was a more holistic approach including both men and women concerns and priorities.
- **Gender analysis:** An assessment of a project using gender analytic tools to collect and analyse information in a systematic way to help in understanding the existing gender situation in a given community, or for assessing the impact of an intervention on men and women.

Exercise:

Spend 15 minutes reviewing the concepts and participants can discuss concrete examples from their context. Share at least three of these examples with the group. E.g. Women fish in near shore areas while men are expected to fish in offshore areas. In many Pacific island countries. A key aspect of understanding gender roles and its relevance to energy is to understand that gender roles have different assigned tasks which have different needs, including energy to be met. These needs are usually divided into practical needs, productive needs and strategic interests.

GENDER ANALYSIS

Practical needs: - Addressing practical needs does not affect gender relations

Interventions to meet practical needs aim to make women's and men's lives easier and more pleasant, but do not challenge the accustomed tasks and roles of women and men in the household or in society, or their gender relations. They do not upset the traditional balance of power between men and women. They are mainly needs related to activities that keep the household running and the families daily survival ensured, which can also include improving household income.

Productive needs: This may affect gender relations by including women in economic generation activities resulting in an improvement of women's status in the family

In addition to their reproductive work many women are engaged in productive activities that earn income. Many of these activities may be an extension of household tasks, for example cooking food for sale or making clothes at home for sale to others.

Strategic Interests: Addressing strategic interests aims to transform gender relations to improve women's societal position.

Strategic interests relate to interests that may change women's position in society and which help them gain more equality with men, and transform gender relations. Men also have strategic interests, for example, they may embrace changes in economic generation and welcome women's inclusion in certain areas if they know it will assist them, or meet general society or household needs.

Women's strategic needs are:

- Generally to do with addressing issues related to laws and gender contracts which tend to be biased against women.
- Some institutional approaches to addressing women's strategic needs e.g. change in laws and an enforcement of laws are seen as long term and other solutions are often sought to bring changes in women's societal status more quickly. For example, women earning an income through an enterprise have been found to increase their status, accompanied by greater influence in decision making and control over resources, within their family and community.
- Those needs that could change or alter gender balance in a community.

Group Exercise:

Division of labour chart to be drawn up including all productive activities and roles of men and women. Group presentations at the end on this and groups should be able to differentiate men/women roles and identify complimentary or overlapping roles.

Discussion Point: Further discuss the roles of men and women as in the last exercise. Groups work on identifying strategic interests that can be met through energy projects. Group presentations at the end of the discussion.

Module 2: Understanding Gender Mainstreaming in Energy

Learning Objectives: After completing the session all the participants should be able to

- Understand the and define Gender Mainstreaming
- Explain the key aspects of Gender Mainstreaming and what impact this would have on gender and energy work.
- Identify key stakeholders and the best approaches to ensure gender mainstreaming.
- Explain the difference between a 'women only' approach to energy project planning and a gender mainstreaming approach,
- What indicators can be used to monitor progress of gender and energy work in the Pacific.

What is Gender Mainstreaming?

Gender mainstreaming is making sure that gender is incorporated in all aspects of energy policies and interventions.. This is making sure proper assessments are made for the use of energy, the sources of energy, productive uses and payment. Gender mainstreaming ensures that gender concerns, needs and interest and differences are considered in all planning and policy-making and project implementation and monitoring. It also identifies the impacts of such interventions

Why Mainstream Gender in Energy Projects?

Energy projects target the use of energy in communities. These communities include men, women, children, the elders, the young and other grouping. Gender mainstreaming ensures that projects targets the needs and priorities of a given community. These projects usually have one or more of the following objectives or *gender goals*:

- ***To improve quality of life***, by reducing women labour and time in activities such as fuelwood collection and processing, carrying water, agricultural labour, food processing, etc, and improving their health. Energy has been identified as a major contributor to the achievement of the Millennium Development Goals (MDGs). This is in time saved in cooking, food processing and fuel collection, lighting and media enabling higher access to reading and public information by women, and clean cooking energy reducing time spent on cooking, water collection and washing.
- ***To increase women's productivity and income***, by providing them with the energy access needed to work more efficiently and allows women to work in new or emerging areas. Increasing women's independent income greatly helps the household and lifts the standard of living of families in the Pacific.. Women and men's increased participation in productive activities result in their investing in more efficient energy appliances and fuels. Energy enterprises also offer opportunities for women as well as men.
- ***To ensure project efficiency and sustainability***, because unless men's and women's needs are properly understood, project interventions may be wrongly targeted and thus fail. Energy projects with poverty reduction as a goal recognize that women are the most involved in food gathering and production and small scale commercial income generation thus play a major role

in poverty reduction.. Household energy technology projects need women's participation as consumers, in maintenance, repair, promotion and extension. Energy projects that already target women may need to consider more strategic processes through gender mainstreaming to ensure sustainability of projects. **To promote gender equality and to empower women**, through interventions and activities that can help them participate in activities and decision making which they have traditionally been excluded from..

Exercise: Group work. Working in groups discuss the project you have been given or are familiar with. Find entry points for gender mainstreaming and how some of the goals mentioned above can be met. Group presentations at the end of this exercise.

Approaches to inclusion of gender

Revise the WID approach (Women in Development) and the GAD approach (Gender and Development).

Gender blind policies

The traditional approach to energy policy and planning has assumed gender neutrality. It has assumed that any differences in the needs and capacities of men and women do not affect the extent to which they benefit **from and contribute to energy development and use**. What we find in reality is that energy planning is often gender blind and it fails to recognise that needs of men and women are different. The consequences of gender blind policies are that they tend to exclude women and do not change gender relations. However, if we aim to ensure that women, as well as men, benefit from energy policies and programmes we aim to ensure that the policies are gender sensitive

Gender-sensitive policies and projects recognise that women have different interests, needs, and priorities with those of men. Being gender sensitive also means that there is a systematic analysis of the impacts, the benefits and contribution men and women make to energy use, energy consumption, access and payments.

Gender biased

This is when a policy or project is said to be gender imbalanced.. That is when it favours either men or women and it leads to an unequal outcome of access to benefits for one group.

Gender sensitive interventions are interventions which take into consideration the different dynamics of relationships between women and men and attempt to address these unequal dynamics through the intervention.

“Women Targeted Projects”

Positive discrimination through projects that targeted women only was the theory and practice of the 1970's. This is when there was a strong move by women all over the world to be recognized.. This was when in most cases women were trying to get proper recognition in society, when there was a movement to get women to vote, so most of the work was trying to

bridge a gap where women were brought up to a level where men were at in education, employment and other areas.

In the Pacific these women only approach assisted in highlighting women issues but did not assist women in projects. Women projects were isolated and mostly failed as gender relations and gender roles within the existing institutions were not considered

The Gender approach

This approach worked within existing societal systems where men and women worked together and in most cases tasks and roles were complimentary. This approach relied on an analysis of both men and women's roles, interests, needs, aspirations and had a more holistic view of projects, of the people and the communities they lived in.

. Solutions to meet women's needs had to be discussed within the mainstream policy making and decision making forums of governments and other organisations active in development (such as international and regional development agencies and NGO's). This shift to a gender mainstreaming approach ensures that men and women participate in and equally benefit from all development legislation, policies, projects and interventions.

At the project level, mainstreaming means that projects have to be designed to ensure that women as well as men are entitled to participate and benefit from a project. This means that there has to be a clear understanding of societal and cultural norms that could hinder women's full participation. Using participatory approaches to community- based work ensures the participation of all members of the community and also ensures there are avenues for women's full participation. Summary of Women in Development Approach

- WID Approach was popular in the 70's & 80's
- WID tried to bridge the gap between men and women
- WID focused on highlighting women's contribution in all areas of society.
- This was a period when women were fighting for rights to vote and to be recognized.
- This was a period of positive discrimination for women and trying to break down barriers that existed.
- .

Summary of GAD the Gender & Development Approach

- Development that involves both men and women
- Assesses gender relations
- Recognises equal rights of men and women to participate
- Brings out the role of society in shaping gender roles and societies

- Gender terms now commonly used in development.
- Works on equity and fair treatment of women and men.
- Also positively targets women but in relation to men's activities, needs and aspirations.
- .

Summary

1. The gender approach is more holistic and includes all sectors of the community.
 - A gender analysis or assessment is necessary to ensure gender is mainstreamed into all projects at all levels. is key to the success of any development project
 - All analysis should focus on both women and men issues, interests, needs and priorities

Exercise:

Review the attached gender action plan against the information you have just learnt on WID (women in development) approach and the GAD (gender and development approach). Based on your understanding, highlight the interventions that are targeted at women only and those that have a stronger gender focus. Explain why the Gender approach is important for Energy projects in the Pacific. How can policy makers be persuaded that this is a better approach to project planning? What other tools can be developed to strengthen work on gender inclusion in energy projects?

Module 3: The process of including Gender in Energy projects

Learning Objectives: After completing the session all the participants should be able to

- Explain the building block approach and other participatory approaches to including gender in projects
- Apply this approach to an ongoing in country energy project

Why include gender in energy projects?

As used by ENERGIA, a **gender approach in energy projects is a process of helping energy projects and their stakeholders:**

- ***to identify their gender goals (what they aim to achieve from a gender standpoint), and***
 - ***to develop a strategy on how these gender goals can be met and measured or tracked,***
- so that both women and men can benefit from energy projects and inequality is reduced or eliminated.¹**

Gender Mainstreaming in Energy Projects

A Gender mainstreaming means the systematic inclusion of gender considerations into all levels of the project. This can be used by projects in a *broad range of energy sub-sectors* where women and men are energy consumers, producers, operators, managers, and decision makers. It can be used *throughout the project cycle*, in project design, implementation, monitoring and evaluation.

The gender mainstreaming process:

- maps the *existing policy, institutional, implementation, evaluation, resource distribution, capacity development in situations* in the country for gender, energy and development;
- *assesses the existing gender capacities* and needs of the energy project and its partners;
- *uses gender analysis* to assess the implications for energy project activities of the gender division of labour, and of women's and men's differential access to and control over resources and benefits, and hence how benefits can be maximized and negative effects minimized for planned energy interventions;
- *collects and analyses sex disaggregated data on the various aspects of gender use and access in a country;*
- helps the energy project develop a *Gender Action Plan and includes strategic directions and sustainable options for long term use;*
- builds *consensus around the Gender Action Plan and builds the necessary capacities to plan and implement the Gender and Energy work;*

¹As defined by the United Nations, gender mainstreaming is:

"...the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated."

- *adjusts project activities and/or carries out pilot activities*, which can contribute directly and/or indirectly to the achievement of the agreed gender goals, and leads to a better acknowledgement and use of gender relations; and
- *establishes a baseline and tracks indicators* for measuring the success of gender mainstreaming efforts, *documents the process* of gender mainstreaming for learning by other energy projects and practitioners.

Exercise: Spend a few minutes thinking about the various Energy projects you are directly engaged in. What stage of the Project Cycle are the projects in? Are there opportunities for mainstreaming gender? Discuss these opportunities and they will result in short term or long term changes. Feed this information back to the group.

1.1. What Is New About Gender Mainstreaming in Energy Projects?

- Why is gender mainstreaming different? Gender mainstreaming in energy projects includes gender consideration in all phases of the project cycle. A gender mainstreaming approach does not look at women in isolation, but looks at women and men – both as actors and beneficiaries in the energy sector.
- Why does gender mainstreaming often appear to focus on women? There is overwhelming evidence that women and girls are more disadvantaged than men and boys in all areas of development and work thus the emphasis under women. Interventions therefore often attempt to strengthen women’s position. Increasingly, gender mainstreaming includes interventions aimed at men and boys as well.
- Experience has shown that energy and gender issues differ by situation, country region. Communities and households
- Experience has also shown that rigorous, gender-sensitive analysis reveals gender-differentiated energy needs and priorities, as well as gender inequalities in terms of opportunities and outcomes. Gender mainstreaming in energy projects seeks to redress these problems within the context of energy project goals.
- Gender mainstreaming also addresses the organizational, institutional, and corporate environment in which energy projects and programs are developed and implemented. It includes a strategy to assess and build organizational capacity for gender mainstreaming.
- Gender mainstreaming through a participatory process can develop a Gender Action Plan that could be incorporated into Energy project work programme and activities.

Training blocks on gender mainstreaming

The training blocks are in stages which takes the participants through a step by step approach on gender mainstreaming into Energy projects

The gender mainstreaming process is divided into ten building blocks, and each stage is described with the help of various tools, checklists and examples. Although these are presented as steps in a cycle, **you should begin with the step that is the most appropriate entry point for the task at hand.**

The gender mainstreaming process is divided into ten building blocks, and each stage is described with the help of various tools, checklists and examples. Although these are presented as steps in a cycle, **you should begin with the step that is the most appropriate entry point for the task at hand.**

For example, if your project is in design stage, it makes sense to go through the entire project cycle, starting with **Block 1**. If however, your project is close to the mid- term evaluation, **Block 9** Monitoring and Evaluation would be more applicable, even though it would be useful for you to familiarize yourself with the whole handbook. Some blocks will provide information important to other blocks as well and can be used for other purposes; for example, the staff interviews or focus groups are a useful tool for carrying out a gender assessment of a project or programme in **Block 3** on Institutional Capacity Assessment, and they can also help to answer the questions about gender goals in **Block 1**, as well as identifying resources and projects that can be mapped under **Block 2**.

Block 2.

These steps can be approached as a checklist – this checklist will help you identify what gender mainstreaming activities you have already implemented, as well as guidance for expanding your approach to gender mainstreaming.

Another way to look at the gender mainstreaming process is given in **Figure 2** below. **Blocks 1, 2, 3** and **4** are diagnostic, with **Block 5a** stocktaking to identify still missing information, which is then collected through fieldwork in **Block 6**. **Block 7** prepares an action plan on gender for the energy project, which is then implemented by the project. **Blocks 8, 9** and **10** are cross-cutting from the beginning of the gender mainstreaming process. For example organization readiness is built already with the involvement of project staff in the identification of gender goals in **Block 3**. Monitoring begins with the baseline information collected in **Blocks 3, 4** and **6**. And **Block 10** on communications is key to building consensus among stakeholders throughout.

Figure 2:



1. BLOCK 1:

2.1. LITERATURE REVIEW: WHAT DO WE KNOW ABOUT GENDER AND ENERGY?

Mapping Exercise

Mapping the gender, energy and development situation in the country helps the project team develop a common view on the key issues in the gender and energy sector(s) that the project is working in, on potential stakeholders and partners, and on what could be some missed opportunities for gender mainstreaming in that energy subsector. It identifies potential partners and resources that can be helpful in gender mainstreaming in the energy subsector that the energy project is concerned with.

Literature review or inventory

At the country level, an inventory or literature review on gender and energy issues summarizes:

- What we know about gender and energy
- What projects or policy interventions have already happened (government, NGO, donor)?
- What is currently happening?

- What is planned?
- Who is working on gender and on energy in this sector?
- What are the issues that must be kept in mind?

Resources

The purpose of this literature review is to have an understanding of what has already been done and documented in gender and energy and to identify gaps.. Resources for the inventory or literature review can include internet searches, project reports, and interviews with local experts, project and government staff. This could also include a review of Government commitments to Gender Equality through international instruments such as the Convention for the Elimination of all Forms of Discrimination against Women (CEDAW), the Millennium Development Goals, the Beijing and Pacific Platform for Action, the Commonwealth Platform for Action, the National Gender Equality Policies and linkages to Energy as well Energy Policy commitments to Gender Equality.

Exercise: Research and identify your Governments' commitments to Gender Equality as above.

Discuss what International and Regional agreements have been signed and implemented.

Review your country's Energy policy for commitments to Gender Equality.

2. BLOCK 2:

3.1. PROJECT DOCUMENTS REVIEW: WHY MAINSTREAM GENDER IN THIS ENERGY PROJECT?

Project document

What are the gender issues and goals identified in the project document(s)? Many energy projects have some general statements about women or gender, but they often lack specific activities to operationalize these statements.

If the project documents do not include any specific gender goals, then what are the gender goals and issues implied by the overall project goals? In an ongoing energy project, recent progress reports can also be reviewed to understand gender priorities included. This review of project documents provides a situation analysis of the gender work done

Documents to review, these could be: The Prodoc (the project document), goal and strategy, operation/ implementation plan, terms of reference, progress reports, evaluation reports and/or other publications.

Desk Review

2. The desk review of the most relevant energy project documents is assessed to determine the following:

- Are gender considerations included in the different parts of the prodoc in a meaningful way: in background and justification, goals, target beneficiaries, objectives, activities, indicators, implementation, M&E data for women and men, risks, budget, communication strategy? Most importantly, does the prodoc make a clear statement on what it aims to achieve from a gender standpoint (the gender goal)?
- Do other documents used to implement the project, such as Terms of Reference, training modules include gender? Do project reports and publications reflect women and gender issues? A simple count of the number of documents and number of mentions of women and gender can be a first step.

3. The collected data is analysed and reviewed to determine, what changes would need to be made in project documents to adequately reflect the project's gender goals? What are possible entry points to operationalize gender in the project? What possible missed opportunities need to be explored through field work?

Block 2 builds on the ideas generated by the Literature Review in **Block 1**, and gives some preliminary ideas for gender mainstreaming in the energy project.

Exercise: Review a current project document against the provided checklist and answer as many questions as possible within the time provided. Share your findings with the rest of the group

Gender-mainstreaming checklist for project documents, UNDP Handbook

GENDER MAINSTREAMING CHECKLIST FOR PROJECT OR POLICY DOCUMENTS:

Questions
Overall: Are the following key words mentioned in the project documents? – “Gender, women, female headed household, women’s participation, women’s income generation, women’s empowerment”.
Background and Justification: Is the gender dimension highlighted in background information to the intervention? Does the justification include convincing arguments for gender mainstreaming and gender equality? Was gender analysis conducted as part of the social assessment/analysis or it was conducted separately. Were the different project-related needs of women and men analyzed as a part of the social analysis?
Goals: Does the goal of the proposed intervention reflect the needs of both men and women? Does the goal seek to correct gender imbalances through addressing practical needs of men and women? Does the goal seek to transform the institutions (social and other) that perpetuate gender inequality? <ul style="list-style-type: none"> • Target Beneficiaries: Except where interventions specifically target men or women as a corrective measure to enhance gender equality, is there gender balance within the target beneficiary group?
Goals: Does the goal of the proposed intervention reflect the needs of both men and women? Does the goal seek to correct gender imbalances through addressing practical needs of men and women? Does the goal seek to transform the institutions (social and other) that perpetuate gender inequality? <ul style="list-style-type: none"> • Target Beneficiaries: Except where interventions specifically target men or women as a corrective measure to enhance gender equality, is there gender balance within the target
Objectives: Do the intervention objectives address needs of both women and men?
Activities: Are measures incorporated to ensure women’s inclusion and participation in project planning and implementation (e.g. interviewing women separately from men to get their views; contracting NGOs or other mobilizers to build support for women’s participation and reach out to women; skill building training for women)? Do planned activities involve both and women? Are any additional activities needed to ensure that a gender perspective is made explicit (e.g. Training in gender issues, additional research, etc.)?
Indicators: Have indicators been developed to measure progress towards the fulfillment of each objective? Do these indicators measure the gender aspects of each objective? Are indicators gender disaggregated? Are targets set to guarantee a sufficient level of gender balance in activities (e.g. quotas for male and female participation)?
Implementation: Who will implement the planned intervention? Have these partners received gender mainstreaming training, so that a gender perspective can be sustained throughout implementation? Will both women and men participate in implementation?
Monitoring and Evaluation: Does the monitoring and evaluation strategy include a gender perspective? Is the M&E framework sex disaggregated (for the baseline, monitoring, impact evaluation) with reporting requirements? Will it examine both substantive (content) and administrative (process) aspects of the intervention?
Risks: Has the greater context of gender roles and relations within society been considered as a potential risk (i.e. stereotypes or structural barriers that may prevent full participation of one or the other gender)? Has the potential negative impact of the intervention been considered (e.g. potential increased burden on women or social isolation of men?)
Budget: Have financial inputs been “gender-proofed” to ensure that both men and women will benefit from the planned intervention? Has the need to provide gender sensitivity training or to engage short-term gender experts been factored in to the budget? Does the project explicitly allocate budget/resources for gender-related activities e.g. women’s income, reducing gender disparity? Is there a gender action plan with resources allocated to implement it? If there is a separate component

for women's advancement, how much is the budget for this separate component?

Annexes: Are any relevant research papers (or excerpts) included as annexes (particularly those that provide sound justification for your attention to gender)?

Communication Strategy: Has a communication strategy been developed for informing various publics about the existence, progress and results of the project from a gender perspective?

Source: Adapted from UNDP, Gender Mainstreaming in Practice: A Handbook, 2002 and ToR, Review of gender mainstreaming in SDN portfolio, World Bank

An example to be provided where participants can review a project document answering the following questions. Does document use sex disaggregated data?

- Does the document highlight different impact on women/men/boys/girls? Specify.
- Does the document highlight how intervention will meet Practical, Productive and Strategic Needs; The summaries presented by the 3 Groups are:

3. BLOCK 3:

INSTITUTIONAL ASSESSMENT: ASSESSING OUR ENERGY PROJECT'S CAPACITY TO WORK ON GENDER

The institutional assessment fulfils two objectives:

- It identifies existing capacities that can be drawn on, as well as gaps in capacities that need to be addressed, in the gender mainstreaming process.
- It provides a baseline for measuring later progress on the institutionalization of gender mainstreaming in the project and/or the organization.

This section discusses two tools that can be used in an institutional assessment:

3.1 An interview guide for conversations with project staff and stakeholders.

3.2 A set of indicators for establishing a baseline to measure institutional capacity for a gender-sensitive energy project.

Tool 3.1 Interview guide for conversations with project staff and stakeholders

Individual interviews can be very useful, especially if staff are not familiar with gender mainstreaming. The findings from the interviews can be presented later to participants in a planning meeting and used as a basis for developing an action plan.

The purpose of the interview guide is to guide an initial conversation on gender and energy with project staff and/or project stakeholders. The conversation can fulfil many purposes. It can:

- Introduce project staff to the gender mainstreaming activities.
- Ascertain the extent of knowledge of gender issues among staff and previous gender training
- Identify relevant experiences in addressing gender issues in the project Contribute to identifying gender goals of the energy project and indicators
- Identify possible entry points and missed opportunities for gender mainstreaming in the energy project
- Elicit suggestions for technical and other support that could be provided by the gender mainstreaming activity, such as training, learning resources, or experts
- Provide a baseline against which to measure change

Outline of Interview Guide in Annex 3.1 (Annex 3.1 to be adapted from the ENERGIA draft manual or a similar interview guide can be formulated)

1. *Explain the purpose of the interview*
2. *How relevant is gender in the sector and in your work?*
3. *Entry points and opportunities*

This interview guide is provided primarily as a tool for **Block 3** Institutional Assessment. However it could also be useful as a guide for interviews as part of gathering information about gender and energy literature and projects in the country in **Block 1** Literature Review, or for interviews with project staff as part of reviewing project documents and experiences in **Block 2** Project Document Review.

Who should be interviewed?

In a small project, all professional staff can be interviewed. In a larger project, a sample of staff can be selected. Energy staff, gender and socio-economic staff, and management could be interviewed.

How should the interviews be conducted?

Interviews can be informal conversations, for example, during field trips or over tea. This guide is not intended to be a question-and-answer questionnaire, but more of a guide and checklist of topics to be covered. The guide is not handed out to the person interviewed, but is used by the interviewer to annotate responses and to guide the conversation.

If it is not possible to carry out individual interviews, then participants in a workshop can be asked to self-assess their capacity to work on gender.

Tool 3.2 Indicators for establishing a baseline to measure institutional capacity for a gender-sensitive energy project

A key part of gender mainstreaming is to establish a baseline for an assessment of institutional capacity that can be monitored on an annual basis to see whether gender mainstreaming is becoming institutionalized in the project and organization. Some of these indicators are objective numbers; all can be self-assessed by the project. .

Table 3.2 Indicators for establishing a baseline to measure institutional capacity for a gender-sensitive energy project

1	<i>Gender-sensitive and gender-balanced indicative strategy as reflected in service objectives, implementation strategies and project performance criteria</i>
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2	<i>Sex-disaggregated planning and monitoring system in operation</i>
3	<i>Gender expertise as reflected in the type of agencies involved, field teams, and focal point</i>
3.1	<i>Expertise of agencies involved</i>
3.2	<i>Expertise of field teams</i>
3.3	<i>Gender balance in the project (by level)</i>
4	<i>Organizational climate - Capacity building, managerial support and staff performance incentives</i>
4.1	<i>Capacity building</i>
4.2	<i>Support from management</i>
4.3	<i>Incentives</i>

A review of 5 Renewable Energy projects in the Pacific came up with following findings.

Indicator 1: Gender sensitive and gender balanced indicative strategy as reflected in service objectives, implementation strategies and project performance criteria

- ▶ **2 out of 5 ranked 0**
 - Access by women is not mentioned in the agency/project sector policy and strategies. No strategy for participation of women or to ensure same opportunities and equal burdens for women and men
- ▶ **3 out of 5 projects ranked 1**
 - Sector policy and strategy documents position women as passive beneficiaries or as target groups for separate energy use programs, in their reproductive roles

Indicator 2: Sex disaggregated planning and monitoring system in operation

- ▶ **5 out of 5 projects ranked 0**
 - No gender considerations in planning and monitoring systems of project

Indicator 3: Expertise as reflected in the type of agencies involved, field teams and focal point

- ▶ **5 out of 5 projects ranked 0** - No agencies or departments with social expertise involved in project planning and implementation. (Some involved in consultations)

Indicator 4: Expertise of field teams

- ▶ **3 out of 5 ranked 0**
 - No gender expertise is present in field teams
- ▶ **2 out of 5 projects ranked 1**
 - Field teams include social expertise, but without specific know-how in gender

Indicator 5: Gender balance in the project

- ▶ **1 out of 5 ranked 0**

- All male or all female staff
- 1 out of 5 ranked 1
- Between 0 – 25% of one gender
- ▶ **2 out of 5 projects ranked 3**
 - Balanced 50 – 50 male and female staff
 - 1 out of 5 not ranked due to insufficient information

Indicator 6: Organisational climate – capacity building, managerial support and staff performance incentives

- ▶ **3 out of 5 ranked 0**
 - No project staff have participated in gender training
 - 2 out of 5 ranked 1
 - 25% of project staff have participated in gender training and can use it in the field

▶ **Indicator 7: Support from management**

- ▶ **3 out of 5 ranked 0**
 - Management is not conscious of gender issues in the sectors or considers them not their task
- ▶ **2 out of 5 ranked 1**
 - Management defines women as passive beneficiaries or target groups for dissemination of technologies

BLOCK 4:

STAKEHOLDER ANALYSIS: HOW CAN STAKEHOLDERS HELP WITH GENDER MAINSTREAMING?

1. ***Mapping of stakeholders.*** Many development projects carry out an analysis of the level and participation of different stakeholder groups, as part of their project planning. This is often done through a joint meeting of stakeholders.

The mapping table is not organised on the basis of gender, but it is important to plot the respective roles and responsibilities of various partners, in order to see what role they can potentially play in the gender mainstreaming process, at various stages in the project cycle.

Do project partners/advisory groups include gender balance and expertise? What other stakeholders could be involved, to bring a gender perspective to the project partnerships? For example, what could be the mechanisms for consulting with women's groups? **Block 1** Literature Review may have uncovered some important actors working on gender and energy in the country.

2. ***Assessing institutional capacity on gender.*** An energy project may want to assess the capacity on gender of its partners who will participate in the energy project. Stakeholders can be assessed for their gender capacity on their gender strategy/goals, their gender balance and expertise, their sex-disaggregation of data, and so on.
3. ***Analysing strengths and weaknesses, opportunities and threats.*** A SWOT analysis is another tool that is often used in project planning, to assess organizational capacity. It can be used in a project or in stakeholder group to assess the level of understanding on gender mainstreaming and identify capacity building needs. This tool could be applied to the energy project itself in **Block 3**, or to a stakeholder group in **Block 4**.

Box 12: Tools and Examples for Block 4 Stakeholder Analysis: These tools need to be annexed but maybe we can apply our pacific energy projects

Annex 4.1 Gender-Sensitive Stakeholder Checklist (UNDP)

Annex 4.2 Stakeholders Analysis Tool in the Laos Biogas Project

Annex 4.3 SWOT and BRET Analysis in the Laos Biogas Project

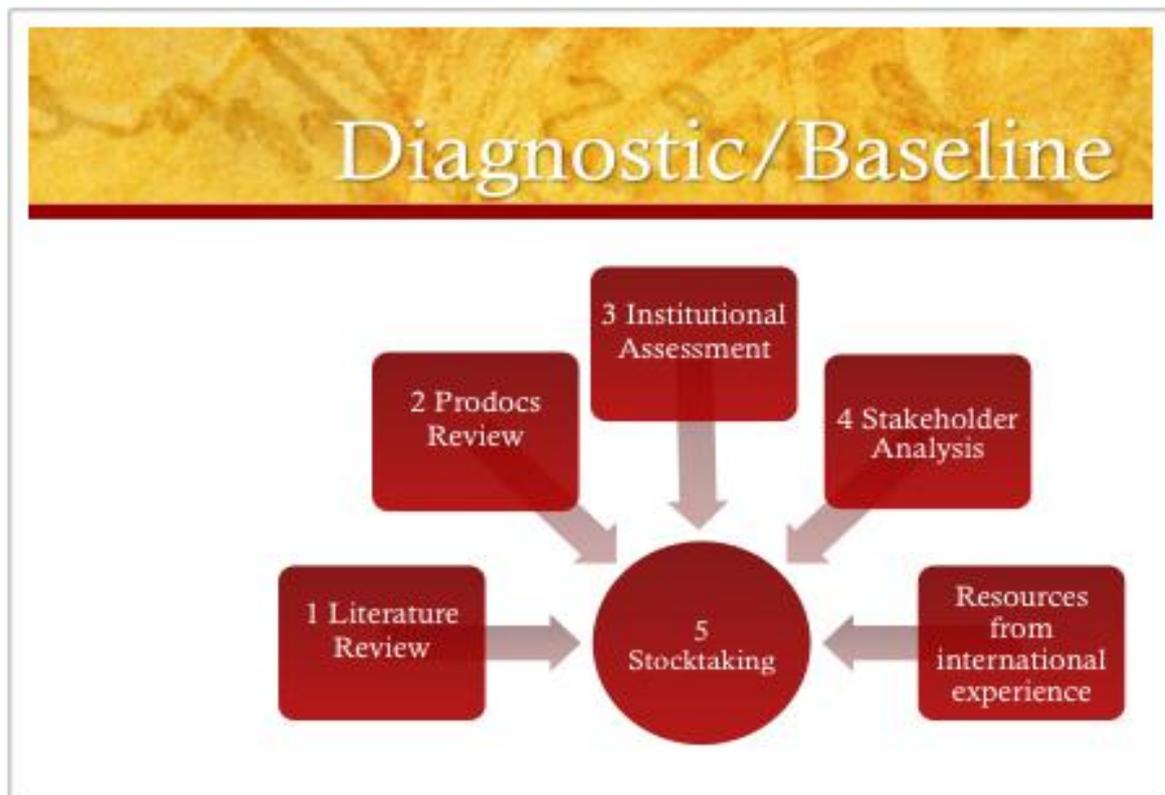
4. BLOCK 5:

STOCKTAKING OF GENDER GOALS, ENTRY POINTS AND INFORMATION GAPS

6.1.1 Checklist of information gathered

At the end of Blocks 1, 2, 3, and 4, you should have the following resources in hand:

- An inventory or literature review of the gender, energy, and development situation in the country
- A gender review of the project document (s)
- An institutional assessment of gender capacity of the project/organization,
- A stakeholder analysis of the partner organizations
- Publications and resources from international experience on gender and energy for the energy project sub-sector



6.1.3 Selecting indicators for establishing a baseline for monitoring and evaluation

Field work will not only collect information needed for planning gender-sensitive planning, but will also establish a baseline for monitoring and evaluation. What is the starting point (that the project wants to improve)? What baseline information do we need as indicators, in order to start to measure progress toward our project gender goals? Once the stocktaking concept note has identified the possible gender goals that the energy project is considering, then indicators need to be developed that could be used to measure these. Information about these indicators will also be collected in the fieldwork.

More details about how to select good indicators can be found in **Block 9** on Monitoring and Evaluation. M&E is often thought of as something that comes “later” in project implementation. However initial data collection needs to include information on a baseline against which progress can be measured. Indicators should be related to the gender goals selected by the project and at a minimum should include:

- a) a measure of changes in women’s and men’s welfare, such as time use or independent income,
- b) a measure of women’s and men’s involvement in project activities, such as the number of women and men participating at different levels, and
- c) progress towards other goals specific to the energy project, such as meeting targets for numbers of installations, that could be affected by a gender-sensitive approach.

More detailed guidance on the selection of indicators and on monitoring and evaluation can be found in **Block 9**.

5. BLOCK 6:

FIELD WORK IN THE COMMUNITY AND HOUSEHOLD: COLLECTING INFORMATION FOR GENDER-RESPONSIVE PROJECT INTERVENTIONS

This section covers the information needed for design of gender interventions in the energy project; some guidelines for initiating gender-sensitive fieldwork; and some common participatory tools that can be adapted to collect information on gender and energy issues.

7.1.1 Information needed for design of gender interventions in the energy project

In an effort to identify what missing information do we still need in order to design and plan gender integration in our project the following issues could be examined.

- What constraints do women and men face in accessing electricity or working in micro-hydro project operation?
- Will women's or men's workload be increased or of reduced by biogas plants since they require additional water and labour?
- What income opportunities could new energy supplies support and how can both women and men exploit these?
- Who in the household makes decisions about purchase of new appliances and fuels?
- What credit opportunities can women and men access to purchase more efficient energy technologies?

Identify what these key questions are for your own energy project, and then design fieldwork that will answer these questions.

Gender analysis² at this stage and collecting information from communities involves looking both at what women and men do, and what they do not do, to see where activities must expand in order to transform gender relations. Gender analytic tools are systematic frameworks for diagnosing the existing gender situation in a given community, or for assessing what the impact of an intervention such as an energy project is likely to be, on men and on women. The key areas gender analysis tools help us to assess are:

- Gender division of labour in the energy sector, i.e. who does what in the households and in the community
- Access & control over energy resources & benefits
- Practical, productive & strategic needs in energy
- Potential for transformation of gender roles in the energy sector

Some key questions related to energy projects that the fieldwork can assess include:³

- What opportunities/constraints do local cultural practices pose to the planning process?
- What tasks would people in the community (men/women) like to improve and in what way?

² A glossary of key gender and energy terms is included in **Annex 6.1**, derived from ENERGIA-TDG Module 1: Concepts in Gender and Energy (module revised June 2005), available at www.energia.org

³ The ENERGIA Module 2 on Gender Tools for Energy Projects includes detailed tools and examples for answering these questions through participatory field work. www.energia.org/

- What energy sources and technologies are involved in the activities that people presently undertake and what are the energy requirements of any new activities which they plan to undertake in the future?
- In what way can energy technology plan a part in improving the tasks that people (men/women) have prioritized?
- Who (men/women) uses and who controls energy sources and technologies used? (Household level and community level)
- What energy technologies do people themselves see as possible solutions to their lives? What are the views of men and women on the value of the proposed energy technologies and what are their priorities?
- Who (men/women) will benefit/be disadvantaged, and in what way, by adoption of the proposed energy technology or by the proposed means of implementation?
- Who (men/women) have access to and control over key resources critical to adoption and sustainable use of the energy technology and participation in implementation
- Who (men/women) are going to be involved in maintenance and repair, and is capacity building necessary? If so, for whom?
- Who (men/women) are going to be involved in management and under what arrangements?

7.1.2 Guidelines for initiating gender-sensitive field work for an energy project with communities

Fieldwork involves relatively brief spells of interaction with the communities, and it is important that it is done well. Unless we are careful, we run the risk that the information collected may not be accurate or reflect the ground realities, and hence using it for decision making can be risky. Most energy project staff are experienced in conducting field work, however, they may not be as familiar with conducting gender-sensitive fieldwork.

This section gives a checklist of some gender-sensitive tips and do's and don'ts for initiating gender-sensitive field work for an energy project with communities. These include incorporating gender field work into project field work if possible, preparing a gender- and energy-balanced team before going to the field, starting with a scoping visit to meet both female and male leaders and key informants, and meeting the community at a gender-sensitive time and place.

7.1.3 Incorporate gender field work into project field work if possible

Ideally, the field work on gender mainstreaming should be incorporated into already planned project field work such as baseline surveys or user surveys or pre-product launch surveys being carried out as part of the project cycle. To the extent possible, gender analysis should be part and parcel of the routine processes of project appraisal and monitoring. Gender analysis of beneficiary groups should be integral to social appraisal and monitoring processes. Already planned user surveys and M&E activities can simply be engendered.

7.1.4 Understanding how to prepare a gender- and energy-balanced team before going to the field

The field team should include both women and men, and both gender expertise and substantive expertise on the energy sub-sector. It is nearly always the case that female field workers will be better able to gather reliable information from women, and male field workers from men. All field workers need to understand the principle gender and energy issues. Before going to the field to collect information, it is useful for the team to get together for a preparatory workshop or an informal meeting. The purposes of the workshop include:

- to clarify the roles of each team member and get them functioning as a team
- to familiarize the team members with the data collection approach, including gender sensitization and energy knowledge, if necessary, and
- to train the team members in each of the data collection tools.

7.1.5 Start with a scoping visit to meet local leaders and key informants, both male and female

Make an introductory visit to the village and try to meet the key people (local leaders). The support of local leaders is very important in the process of community mobilization. Obtaining the agreement of local leaders helps. Make sure you are aware of all the important people – not just political leadership, but also traditional leaders, leaders of other community groups and religious leaders of all faiths.

These should include both men and women leaders and it may be necessary to use innovative ways to identify women leaders, and to meet with them separately from the male leaders in order to obtain their views. Asking to see traditional female domains such as kitchens, schools, and health clinics, may provide openings for discussions with women and women leaders.

As part of meeting with local leaders:

- Provide the leaders with basic information about your work. Chances are that they would be familiar with the energy project, but it is useful to carry some pamphlets/ communication material on the energy project with you. They may not be familiar with gender approaches and this may be a first introduction for them.
- Seek a time and location convenient to them to organize a village meeting (see the following section for advice on selecting gender-sensitive time and location).
- When you arrange a community meeting later, it can be helpful to invite a man and a woman who are well respected by the local community to introduce and lead the discussion (as long as they will not dominate).

7.1.6 Meet the community at a gender-sensitive time and place

A village level community meeting is often the method for initially engaging with the community. The overall objectives of conducting this meeting are: Introducing the purpose and the structure of information collection to all the people present, getting an overall feel regarding the gender and energy situation in the village, identifying smaller men's and women's group for carrying out the PRA exercises and identifying key informants for further interaction. The villagers – both women and men – need to be informed beforehand about when you would like to meet with them, and a convenient time and place sought to carry out the discussion. This

could be a community place where all villagers are willing and allowed to come to. In parts of Asia, a village temple may be out of bounds for lower caste people, while women, especially the lower caste ones, may not always be allowed to participate in village meetings. Imaginative arrangements may need to be made to consult and involve them, for example:

- It is often best to talk to women and men in separate groups, after an initial introduction to the community.
- Women may be less able to understand the fieldworker's language, even if it is a national language. In order that their inputs are meaningful, ensure that women as well as men fully understand the objective of the meeting before seeking any inputs.
- A female community mobilizer will usually be more effective in conducting the meeting with women, and a male community organizer with men.
- Depending on the situation, you may find it useful to conduct the meeting in a woman's house where the women can talk freely, instead of a community/common place, where men are likely to walk in and out.

7.1.7 Tools for collecting information on gender and energy issues

Focusing in on the most relevant gender and energy issues for the project and gathering information about these can be a "rapid appraisal" approach. Participatory Rural Analysis (PRA) methods can be used for participatory data collection from communities, households and women. A large number of PRA handbooks are available, which provide tools and methodologies for data collection, and the reader is referred to these for details (listed at the end of this chapter). The remainder of this section reviews five typical approaches that are commonly used by energy and development projects for participatory field work, and offers some suggestions on how to "engender" these tools to ensure that the needs and views of both women and men are included in an energy project:

- Direct observation
- Community level tools on gender relations, socio-economic structure and resources
- Discussions with focus groups
- Household surveys

7.1.8 Direct observation

Direct observation of processes within a village can be quite enlightening. It can provide useful information on the socio-economic status of households, how men and women operate within the household and the community, how they manage energy resources, what tasks they perform to manage household energy, and what is the impact of energy poverty on women, men, girls and boys. Some of the things to observe include:

- Variations in housing types (including walls, floors, roofing), a useful indicator of socio economic status
- Types, quantity and variety of food for sale in the market
- Numbers and types of LPG stoves, radios, TVs, bicycles, motorbikes and utensils

- Age and proportion of boys and girls in school
- Fuel collection pattern and distance to fuel sources

7.1.9 Community-level tools on gender relations, socio-economic structure and resources

A number of tools are available for collecting further information on the socio-economics of the community. In the rural context, where men and women have different roles and expertise, groups based on gender may be the most practical basis for forming groups and collecting information. For efficient gathering of data, a particular gender (for the specific context of the particular village) is likely to have the most reliable data for specific areas. For instance, as women are primarily responsible for cooking in rural areas, they are likely to have an in-depth understanding on issues related to cooking. Further, in such rural contexts where women may not express their views in front of men, forming separate men and women's groups for PRA exercises is necessary simply to have equal voices heard. The field worker must be conscious of the local divisions of labour and skills in deciding who will provide accurate information on fuel use, agricultural practices, land holdings, assets, etc., and take this into account when information is gathered.

Some useful tools that can be used to record information are as follows:

- Village Resources Map: for learning about the environmental, economic and social resources in the community.
 - Transects: Natural resource base, land forms, distance from fuel source, land use, location and size of farms or homesteads, and location and availability of services.
 - Village Social Map: community's population, local poverty indicators, and number and location of households by type (ethnicity, caste, female-headed, wealthy, poor, etc.)
- Venn Diagrams: for learning about local groups and institutions, and their linkages with outside organisations and agencies.
- Activity and Decision Making Profile of energy related tasks (to identify existing roles and responsibilities of women and men in the energy use and management and who has access to and control over energy facilities at household and community level.).
- Activity Profile to Assess the Workloads of Women in Relation to Men
 - Seasonal Activity Calendar for learning about the seasonality of women's and men's labour, and seasonality of energy availability and income and expenditure patterns, and other seasonal issues of importance to the community.
 - Daily routine for learning about the division of labour and labour intensity by gender and socio-economic group.

7.1.10 Discussions with focus groups

Some possible stakeholder groups for focused discussions are: male & female-headed households, local energy service providers and administrative structures. Some issues for discussion could include:

- What are the priority problems in the community? for women ? men? for different socio-economic groups?
- What development activities do different people propose?
- For each proposed development activity, who are the stakeholders? How big is their stake?
- Is there conflict between stakeholders? Possible partnerships?
- Given resource constraints and stakeholder conflicts, which proposed activities can realistically be implemented?
- Which development activities most support the energy project goal (or gender goal, if there is one)?

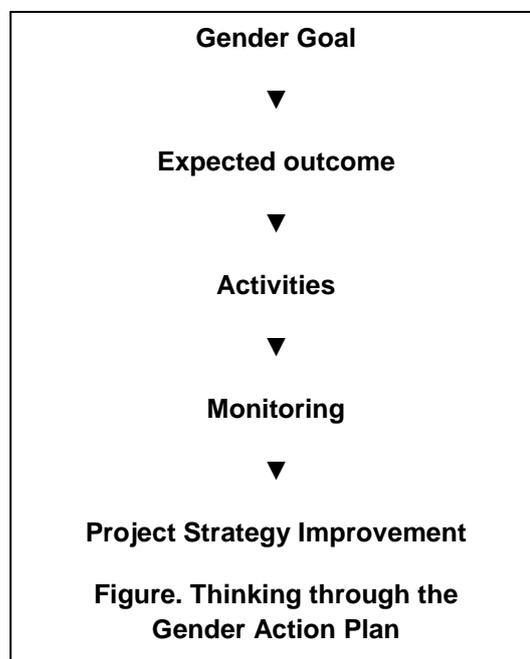
7.1.10 Household surveys

The objective of collecting household level data is to identify the energy needs and demand of men and women, to compare knowledge levels on energy use/management of men and women, who controls and benefits from energy (Annex Questionnaires developed for Tonga and Vanuatu energy and gender workshops)

6. BLOCK 7:

PREPARING A GENDER ACTION PLAN: AGREEING ON GOALS, ACTIVITIES AND INDICATORS

Preparing a Gender Action Plan is a key point in the gender mainstreaming process. Once the gender team has collected and analyzed the necessary data, it has a variety of information to present to energy project management and project partners and stakeholders, in order to formulate project interventions from a gender perspective that will contribute to the gender goals identified in the earlier blocks. The gender team will need to decide how best to present this information and its recommendations. Some projects may want to take the outputs from **Blocks 1 to 6** above and work internally to develop a draft plan that can be presented to project management or to partners in a workshop, as part of advocacy and capacity building. Other projects may want to use a workshop as the means to develop the strategy and action plan, together with partners, as part of consensus building. Either way, the output of this step should be a strategy and action plan which includes the following elements.



8.1.1 Gender goals

The importance of defining clear gender goals has already been discussed in **Block 5**: It will be critical to deciding what we want to target, and accordingly to designing activities. It is a common problem in projects that there is no link between what the project wants to achieve in terms of gender (a gender goal), what activities it plans in gender mainstreaming (strategy), and what indicators it sets for itself and tracks. The gender goal should be relevant to the project (project document review in **Block 2**), in line with communities and households needs, priorities and aspirations (fieldwork in **Block 6**), realistic in terms of capabilities of the project and stakeholders (**Blocks 3 and 4**), achievable within the given social and cultural setup, project resources and duration, and yield concrete outcomes (be monitorable/ trackable).

Some potential gender goals have already been identified by the gender team through **Blocks 1 to 5**, and baseline information about indicators for the gender goals should already have been collected in the fieldwork in **Block 6**. The Gender Action Plan should start by establishing agreement among project staff and management on what the final gender goals will be, setting quantitative or qualitative targets for meeting these goals, and hence what specific indicators will be used to measure progress towards them.

8.1.2 Gender mainstreaming strategy, expected outcomes and activities

Once the gender goals are identified, the project strategy needs to identify where, why and how specific gender mainstreaming initiatives need to be applied, in order to achieve the agreed upon gender goal/goals.

The gender mainstreaming strategy should:

- Ensure that factors that could limit women's participation/benefits are well understood and measures are in place to address them.
- Identify potential benefits and risks to women and men of proposed interventions; formulate strategies to mitigate risks.
- Seek women's and men's views about proposed technology options and design features as well as anticipated benefits.
- Determine, for both women and men: who is likely to make decisions about technology options; who will be involved in maintenance/repair and what training will be necessary; who controls relevant resources; and who has the willingness and ability to contribute labour, material, or money to the project.
- Identify gender differences in access to and control over resources related to energy and energy services.

8.1.3. Consultation with target communities to provide feedback on the GAP and build consensus in the communities

By now, you have already collected some data through the fieldwork (**Block 6**). Once the data is analyzed and you have an idea of the planned activities, it is worthwhile to go back to the community to:

- Consult men and women users in the designing of energy schemes (technical, financial, social considerations, O&M)
- Orient the target population or users on the handling and use of energy scheme
- Brainstorm on roles and responsibilities of men and women members in energy Committee to delineate roles in Project Activities

It is unlikely that you would be able to revisit all the communities that participated in earlier data collection, however return discussions with a few would provide useful reality check on planned activities, and also help build consensus.

7. BLOCK 8 INSTITUTIONALIZING GENDER MAINSTREAMING IN THE PROJECT AND ORGANIZATION

A crucial aspect of gender mainstreaming involves developing the organizational environment and advocacy for gender equality. Project implementers, staff and management, decision makers and partners, will have to devote scarce resources to gender equality activities, so they need to be convinced that their investment in gender equality will pay off. Project stakeholders at different levels may need additional skills, outside expertise, or resources in order to implement the Gender Action Plan.

Institutionalizing gender mainstreaming in the project and organization means making progress on the indicators for gender-sensitive institutional capacity measured as a baseline in Block 3.

Table 3.2 Indicators for establishing a baseline to measure institutional capacity for a gender-sensitive energy project

1	<i>Gender-sensitive and gender-balanced indicative strategy as reflected in service objectives, implementation strategies and project performance criteria</i>
2	<i>Sex-disaggregated planning and monitoring system in operation</i>
3	<i>Gender expertise as reflected in the type of agencies involved, field teams, and focal point</i>
3.1	<i>Expertise of agencies involved</i>
3.2	<i>Expertise of field teams</i>
3.3	<i>Gender balance in the project (by level)</i>
4	<i>Organizational climate - Capacity building, managerial support and staff performance incentives</i>
4.1	<i>Capacity building</i>
4.2	<i>Support from management</i>
4.3	<i>Incentives</i>

Ideally, the Gender Action plan would include a strategy with targets and activities to progress on these indicators. But these may also be developed after the basic lines of the GAP have been agreed. This section suggests some activities that could contribute to this progress.

- **Gender structures, such as a gender focal point and advisory group**
- **Gender capacity building, of decision makers, project staff, and partners**
- **Engendering project frameworks/logical frameworks, including where to include gender in project documents, tools and processes**
- **Practical strategies to make an organization a gender-sensitive place to work**

- **A timeline and budget**
- **A monitoring plan with targets and indicators**

A communications strategy that develops convincing arguments, consults and involves project stakeholders, engages stakeholders in the GAP, and enrolls gender allies and networks, is also a key part of follow up to the Gender Action Plan; this is discussed separately in **Block 10**.

9.1.1. Gender structures, such as a gender focal point and advisory group

Staff with designated responsibility for mainstreaming gender and building staff capacity is necessary. Their “entry points” to capacity-building and opportunities to promote attention to gender will vary in different organisations and plans should allow them a degree of flexibility. But some kind of gender focal point will need to be designated.

Once the gender activities have been identified, you need to develop a clearly spelt out terms of reference for the gender focal point. It is best if this is developed in consultation with senior managers and gender focal points themselves. The TOR should realistically be in line with the *time and resources* that will be available.

Box 28: Common constraints faced by Gender Focal points

- *Lack of clarity about their roles and responsibilities*
- *Lack of management support*
- *No additional time/resources allocated to their gender focal point role*
- *Women staff members selected as focal points on the basis of their sex rather than their commitment to and understanding of the issues*
- *Relatively junior staff members selected as focal points but lacking the authority and seniority to undertake this role effectively.*
- *The gender focal points are expected to take full responsible of addressing gender issues, while the other project staff is ‘freed’ of this responsibility.*

External gender expertise or women experts may also be needed. Almost always, in order to ensure women’s participation in communities, you need to work with female planners, research staff and extension agents, as well as working with representative women’s organisations, to enable poor women to express their views in a non-threatening environment and in a way that will influence the development agenda. If your project team does not have a woman, it is wise to hire an external consultant to fill in.

Conducting gender analytical research requires well-developed social and gender analytical skills, and requires appropriately trained and experienced staff or consultants.

Gender training activities require staff or consultants with skills in adult learning and participatory training, in addition to applied and practical understanding of gender analysis and gender mainstreaming.

9.1.2. Gender capacity building, of decision makers, project staff, and partners

Capacity-building initiatives on gender should be included in policy documents and project plans, backed up with staffing and resources, and measured with appropriate indicators of change.

9.1.3. Engendering project frameworks/logical frameworks, including where to include gender in project documents, tools and processes⁴

Project gender teams will want to consider whether their project documents meet the definition of gender mainstreaming, or do they need to be adjusted? Do the key documents reflect an understanding of and commitment to

...paying attention to both men and women?

...including a broader commitment to improving gender equality?

...seeking to empower women to make choices about energy?

...seeking to make affordable, needed energy options available to women?

...involving women's participation at different levels – users, operators, project, program, policy?

Some ideas on where and how to include gender concerns in documents are as follows:

(a) Target groups

- The LFA and the PID should clearly state who the policy/project is targeting. It should be clear which activities and outputs are targeted to women, which to men and which to both
- Replacing general terms such as “the poor” or “poor farmers” with, where appropriate, “poor women and men” and “poor male and female farmers” makes women as well as men clearly visible and avoids misunderstanding.

(b) Purpose and goal

- The promotion of gender equality (benefit for women as well as men) should be an aspect of the purpose and goal of all development policies/projects concerned with impacting on people's lives. This should be reflected in Indicators and, where possible, also in the wording of the purpose/goal statement.
- If benefit to men and women is part of the goal and purpose, specific activities/outputs will be required to bring this about and need to be included in the logical framework.

(c) Outputs

In some projects, it may be useful to have one output specifically concerned with targeted activities for women. However, it is important not to isolate women's activities within one output with a very small claim on resources and no influence on the rest of the project. *Targeted outputs of this kind should complement activities to mainstream gender throughout the*

⁴ Adapted from DFID. Gender manual: A practical guide for development policy makers and practitioners, Helen Derbyshire, April 2002.

policy/project. Benefit for women as well as men should be considered as an aspect of *each output*. It is important to include gender in *output indicators and associated activities*.

(d) Activities

The promotion of benefit for women as well as men requires *targeted activities*, backed up with *human and financial resources*. Resource allocation is directly linked to the *activity line* of a logical framework. See section ... for an idea of activities.

In the context of projects, the project framework agreed between the donor and partner government/civil society organization is the key document. This may be the LFA and/or the Project Implementation Document. To the extent possible, explicit references to gender issues and mainstreaming activities are required in the logical framework. The extent to which gender issues are included in logical frameworks depends on the motivation, influence and knowledge of the people involved in drawing them up. If however, the project is at a stage, where the LFA has already been drawn up, the next best alternative is to engender the PID.

Furthermore, the GAP must ensure that responsibilities and expectations concerning gender aspects are clearly indicated in project documents, agreements, and contracts.

An important part of the gender action plan is to make sure that an attention to gender issues included in routine systems and procedures (information systems; appraisal, planning and monitoring procedures), and that staff has the necessary guidelines/information/tools on gender mainstreaming. It may be unrealistic to expect that this would be achieved fully within the time frame of the ENERGIA project, however, the GAP must, at the minimum, have a clear blueprint and commitment on what actions would be taken in this direction.

9.1.4. Practical strategies to make an organization a gender-sensitive place to work

Examples include:

- Re-organizing working hours so that staff are better able to attend to family responsibilities. For example, establishing a definite 'quitting time' or allowing staff the option of 'flex-time'.
- Setting up policies on maternity and paternity leave.
- Providing appropriate facilities that respond to gender-based needs including childcare or lavatories.
- Demonstrating gender sensitive behaviour. For example, in the language used, comments that are made, images or materials displayed, meeting practices.
- Spreading travel responsibilities widely among staff.
- Posting spouses to the same community or region so that the family is not separated.
- Securing the health and safety of staff. For example by establishing mechanisms to deal with sexual harassment, providing safe transportation for women, limiting travel pregnant women are required to do or giving staff the right to refuse assignments that pose undue risk.
- Addressing gender issues in all interviews, job descriptions and performance reviews.
- Encouraging a gender sensitive management style and promoting mutual respect for diverse working or management styles.

9.1.5 A timeline and budget

Without adequate resources, the Gender Action Plan cannot be implemented. What resources, expertise, training, and activities will need to be provided in order to implement the Gender Action Plan? The Plan should specify these.

9.1.6 A monitoring plan with targets and measurable indicators of goals, outcomes, and activities

A monitoring plan should ideally be part of the Gender Action Plan. What targets and indicators would best and feasibly measure our project's gender goals, outcomes and activities? Which input-output indicators? Which impact indicators? Will quantitative and/or qualitative indicators be used? What is our monitoring plan – who will do the monitoring and how? What tools will be used? In projects that have been “gender-mainstreamed”, all indicators should be disaggregated by sex wherever possible. This helps to identify the gender differentiated impact of our interventions.

Monitoring and evaluation are discussed further in **Block 9** below.

8. BLOCK 9:

A MONITORING & EVALUATION PLAN: INDICATORS OF PROGRESS AND INSTITUTIONALIZATION⁵

Monitoring should take place at two different levels: Monitoring impacts or progress towards goals and objectives; and monitoring the implementation process. Indicators for both of these need to be selected early in the gender mainstreaming process, so that they can be included in the institutional capacity assessment (**Block 3 and 4**) and field work (**Block 5**).

Monitoring progress

Monitoring impacts of gender mainstreaming, or, more accurately, monitoring progress towards fulfilling goals and objectives of the gender mainstreaming. While impacts on gender goals may not be fully achieved during the one-year ENERGIA-supported activity, it is important that indicators be chosen and a baseline established, so that progress toward impacts can eventually be shown. Indicators should be linked to the gender goals developed in the earlier blocks, and at a minimum should include indicators of:

- a) a measure of changes in women's and men's welfare, such as time use or independent income,
- b) a measure of women's and men's participation in project activities, and
- c) progress towards other goals specific to the energy project, such as meeting targets for numbers of installations.

These indicators need to be selected early in the gender mainstreaming planning, in connection with goals, since a baseline for monitoring indicators of impact needs to be established through the initial field work.

Monitoring the implementation process

One aspect is whether the different steps in gender mainstreaming have been carried out – has there been an inventory, a project document review, staff interviews, field work, a Gender Action Plan, and so on? This monitoring happens through process documentation and regular reporting.

An important aspect to monitor is institutionalization of gender mainstreaming in the energy project and organization. This can be done by monitoring indicators in the project/organization assessment in **Block 3**: gender mandate, gender balance and expertise, sex-disaggregation of data, and gender strategy.

⁵ Source: Adapted from UNDP, Gender mainstreaming in practice: A handbook, 2002.

A gender-sensitive monitoring plan

The Gender Action Plan should include plans for monitoring both progress and the implementation process. The monitoring plan should specify:

- who is responsible for monitoring tasks
- how other stakeholders will participate in the process
- when monitoring will take place
- what tools will be used to record observations
- what mechanisms exist to review progress (periodic appraisal or review sessions)

Gender-sensitive targets and indicators

Targets make the gender goals concrete, and therefore increase the possibility that they will be attained. Concrete targets also increase the possibility that concrete resources (human, financial) will be diverted in order to achieve those targets.

Effective targets are

- progressive but realistic
- time-bound
- measurable

Integrating a gender perspective means that effective targets are also gender sensitive, they consider the situation and needs of both women and men.

Indicators map progress towards achieving targets. Effective indicators are:

- comparable over time
- comparable with other countries, regions or target audiences
- measurable – can be quantified or categorized
- precise – not likely to be affected by other factors
- selective and representational – not too many indicators that will be difficult to track

In an energy project that has been “gender mainstreamed”, ALL indicators should be disaggregated by sex wherever possible. This helps identify the gender differentiated impact of interventions.

Indicators are signals, prompting the management to ask questions about a projects' success or failure, why a project is succeeding or failing and calls for a much wider level of analysis. The indicators we choose should provide answers to questions we have about substantive progress or the implementation process.

How do I develop gender indicators for an energy project?		
Asking the right question – what do you want the indicator to tell you?	Determining the information needed to answer the question	Identifying the source of such information
Are both men and women equally benefiting from the energy project?	Extent to which women and men save time or earn independent income	User surveys, focus groups
Are both men and women equally participating in the energy project?	Men’s and women’s participation as users, operators, entrepreneurs, decision makers	Project records
Indicators specific to the energy project, eg #s of installations	No. of connections by male-headed and female-headed households	Project records
Indicators of process - institutionalization of gender mainstreaming	Gender balance & expertise, sex-disaggregated planning & monitoring systems, gender strategy	Institutional assessment

Some examples of indicators for gender mainstreaming in energy projects

(a) Project goal: To reduce poverty through modern energy services

Examples of indicators

- Increased time availability for women to engage in income generating activities
- Cleaner and more efficient energy services for home based, women industries
- Households gaining access to modern energy services, including grid electricity
- Availability of efficient equipment for cooking, heating, water supply, lighting
- New micro enterprises being taken up by rural communities, including women

(b) Project goal: To improve literacy rates among women through a biogas programme

Examples of indicators

- Ratio of girls to boys in school
- Literacy rates among men and women
- Increased functional literacy among women
- Availability of lighting and communication equipment
- Increased investments in education
- Increased levels of self-employment and development of women’s entrepreneurial skills
- Increased women participation in meetings and public domain
- Increased number of women in occupations other than agriculture

(c) Project goal: Empowering women through energy interventions

Examples of indicators

- Increased acceptance of women as community decision-makers by both men and women
- Number and frequency of community meetings
- Number of female attendants in community meetings
- Men and women’s perceptions on women’s participation in public affairs

- (Self) image of women (e.g. self-esteem, capacities in development activities, knowledge and skills)Number of male and female committee members
- Responsibilities and performance of male and female committee members
- Number of male and female community members trained (technical, financial and management aspects)
- New, more visible, and more effective women's organizations
- Increased number of women in non-traditional spaces
- Number of women employed outside the agricultural sector
- Ownership of productive equipment by women
- Improvement in women's self esteem
- Decreases in wage inequalities between women and men
- Increased investment in girl's education

Typically, some of the above indicators can be quantified which would include some element of *target setting*. For example:

- _ women form at least 33% of energy committee members by the end of Year 2
- _ equality in girls and boys access to primary education by end of year 5
- _ 25% increase in number of women operators in micro hydro projects by year 5, from a baseline of x%.

Some can be qualitative, and refers to perceptions and experiences, and ideally should be developed in conjunction with beneficiary groups. In project documents it is legitimate to use in a phrase like *"quantitative and qualitative indicators to be developed with beneficiary groups in first six months of the project"*. This creates the space to develop indicators in conjunction with beneficiary groups once they have fully understood the nature of the project. (What changes would they like to see? What will the change look like? How can it be measured?). This process should take place using qualitative methods such as focus group discussions and informal interviews. It is only possible to set targets for qualitative change if baseline data is available. For example:

- at least 50% of women participating in energy user committees report active involvement in management and decision-making by the end of Year 2 (from a baseline of 10% at the start of the project)
- at least 70% of women are aware of the project services and benefits (from a baseline of 5% average at the start of the project).

9. BLOCK TEN

A COMMUNICATIONS STRATEGY: WHAT HAVE WE LEARNED?

While “communication strategy” figures as the last step in this gender mainstreaming guide, communications in fact needs to be integrated at all phases of the project cycle. Communication with other stakeholders will influence the success of gender mainstreaming in the energy project and the potential for its replication more widely.

At least three types of communications products should be envisaged:

- 1.1 Process documentation of the gender mainstreaming activity, through regular project reporting
- 1.2 A case study with results of monitoring and lessons learnt
- 1.3 National level dissemination through meetings or a workshop

Project implementers, staff and management, decision makers and partners, will have to devote scarce resources to gender equality activities, so they need to be convinced that their investment in gender equality will pay off. Project stakeholders at different levels may need additional skills, outside expertise, or resources in order to implement the Gender Action Plan.

Several strategies have been successful in this regard:

- Developing convincing arguments that relate concretely and precisely to energy project goals and that will to minimize the constraining forces and promote the driving forces. Key issues to take into consideration are: what energy and development problems will gender equality contribute to solving (the use of tables and statistics to visualize/quantify the problems), what are the gender goals and how they will be measure? What specific benefits will a gender-responsive perspective bring to the energy project? What is the “added value” of gender mainstreaming? What are is the timeframe and overall budget? In general what are the roles and responsibilities of the different stakeholders?
- Consulting and involving project staff, management, decision makers and partners throughout the gender mainstreaming exercise and in developing a Gender Action Plan. However, remember that stakeholders can be active at different stages in the policy planning and implementation processes. Stakeholders also have different levels of power and influence. To be strategic it is advised that the project team will conduct an analysis that identifies different types of stakeholders at the level of funding, policy, operations and beneficiaries and their level of influence on the project. The analysis will enable the gender team to focus on key stakeholders and make the most effective use of your resources for their communications strategy.
- Gender-sensitization training of energy project implementers and decision makers, to increase their understanding of gender mainstreaming and their skills to be able to implement. Specific gender trainings, coaching, and networking can also be useful for staff , partners, and beneficiaries.

- Gender will also need to be integrated as part of the curriculum in training courses, and gender expertise included in ToRs for project staff.⁶
- Enrolment of gender allies and networks at the national and international levels and in sponsoring agencies, in support of gender mainstreaming in the energy project, through linkages, advocacy, and resource mobilization.

⁶ Example of a gender training program: ENERGIA Modules 2005, especially Module 1 Concepts in Gender and Energy; materials from national training workshops that can be found at: <http://energia-africa.org//TrainingModules>

