

MODULE 5
ENGENDERING ENERGY PROJECT PROPOSAL
DEVELOPMENT:
CAPACITY BUILDING OF NGOs

An explanatory note for trainers

General introduction to the module

This fifth module in the training course “The Gender Face of Energy” deals with “Project Proposal Development”. The module can be seen as a stand-alone training package. Participants who have followed either of the first two modules will have some advantage and may find some of the information in this module familiar.

The module consists of seven units which each deal with different aspects of “Engendering Project Proposal Development”. An eighth unit is a re-entry exercise for participants to integrate what they have learnt in the course into their everyday work. The trainers manual provides additional information to that contained in the participants manual, as well as guidelines on the discussions, the exercises, etc.

The format of the module

Each unit consists of the basic concepts, and includes some short case studies and some discussion points. There is a separate manual for the participants which contains detailed material to explain the topics. It is suggested that the trainer presents the material orally in classroom sessions, encouraging participants to engage in discussion about the concepts given. The discussion points can be used to stimulate the participants to contribute. Each unit ends with exercises which are intended to help deepen the participants understanding of the issues presented.

After two of the units (3 and 6), there are assignments, referred to as case-practices, which take much longer to complete than the exercises. These case-practices give participants the opportunity to practice in depth some of their newly-acquired skills and knowledge.

Throughout the module, a number of tools are introduced that will improve the working practices of participants in a more gender-aware project proposal content as well as the process of developing the proposal. In other words, gender mainstreaming is the underlying concept.

Introduction to Engendering Energy Project Proposal Development

‘Gender and Energy’ is a relatively new field within sustainable development policy. Increasingly, proposal writers have to incorporate gender into their proposals, and many donors make the inclusion of gender a condition of acceptance. Therefore, project proposal development in the field of gender and energy will become increasingly relevant for those active in the energy sector.

This module presents the process of project proposal development from a gender and energy perspective. Although much of the knowledge needed for any project proposal development is of a generic character, special emphasis is put here on project proposal development in the context of gender mainstreaming in the energy sector. Gender mainstreaming means that not only should the content of proposals address gender issues but the process of proposal development itself should also be gender-sensitive.

Aim of the module

To provide the rationale as well as tools and techniques for project proposal development and tendering processes, especially in the field of gender and energy.

Key concepts in this module

The key concepts and ideas in this module are:

- Project proposal development;
- Tendering processes;
- Gender-aware analysis;
- Objective-oriented project planning (OOPP);
- Logical framework;
- Terms of Reference;
- Organisational assessment.

Topics in the module

The five units in this module discuss the following topics:

Unit 1: Problem Diagnosis;

Unit 2: Responding to Assignments;

Unit 3: Project Identification;

Unit 4: Gender and Organisational Profile of Organisations Implementing Energy Projects;

Unit 5: Relevant Skills for Proposal Writing;

Unit 6: Project Proposal Formulation;

Unit 7: Process Evaluation and Final Steps;

Unit 8: Making an Action Plan

Target group of participants

The target group for Module 5 includes people working in the field of energy and gender, or intending to work in this field, who want to react to calls for tenders for gender and energy projects or who want to develop project proposals in search of funding for this kind of project.

Time needed to complete the module

The entire course amounts to five days of study time. However, to accommodate the learning process, the course is spread over six days. The table below shows the allocation of the units to the different days. Each block represents approximately two hours of study time. It is advisable to have a short break between the blocks in the mornings and afternoons, and a longer break between the morning and afternoon sessions.

The light-grey cells are those parts of the course where participants will work on case-practices or other hands-on activities.

	<i>Morning</i>		<i>Afternoon</i>	
Day 1			Introduction	Unit 1
Day 2	Unit 2	Unit 3	Unit 3(cp)	
Day 3	Unit 3 (cp)	Unit 4	Unit 5 (ws 1)	Unit 5 (ws)
Day 4	Unit 6	Unit 6 (cp)	<i>Free afternoon</i>	
Day 5	Unit 6 (cp)		Unit 6 (cp)	Unit 5 (ws) Unit 7
Day 6	Unit 5 (ws)	Unit 8	Closure	

N.B.: cp stands for ‘case-practice’, in which small groups work on the same topic, and ws stands for the ‘workshops’ that makes up Unit 5. In these workshop sessions, participants work on various skill-building activities. There are seven workshop options in total. If there are enough trainers, these can be run as parallel sessions. The other activities are in the form of plenary sessions involving all the participants.

Working forms

The following working forms are used in this module:

- Reading and digesting the material: the trainer should present and explain the material presented in the participants manual. Sufficient time should be made available to allow participants to ask the trainer for further explanation;
- Discussion points: questions relevant to the part of text they accompany; meant to facilitate discussion between participants and the trainer;
- Exercises: tasks that need to be done individually or in groups and which support understanding of the theory;
- Case-practices: Lengthy assignments to practice the newly acquired skills and knowledge in relation to an actual case.

Sources

The sources for this module include ETC training modules on consultancy skills and practices, and training material on rural energy planning developed by the Department for Technology and

Sustainable Development, University of Twente and by the East and Southern Africa Management Institute (ESAMI) for SADC TAU.

Structure of the module

Throughout the manual, references are made to other parts of this module and to other modules in the series ‘The Gender Face of Energy’. The terminology used in all modules is consistent. When a reference is made to a “unit”, this means one of the eight units within this module unless another module is specified. A reference to a “section” links to where a major subject within a unit is being addressed. These are indicated by a header preceded by a single digit (for example: **1 Introduction to Gender and Energy**) When a reference is made to a “part” of a unit, this usually means a subsection (e.g. **1.1 What is gender?**).

Each unit is built up in a similar way with the first part presenting the theory on a certain subject. This theory is accompanied by discussion points. Exercises are also included to get a better understanding of the theory.

Training methods for the Module

Our experience is that in ‘gender and energy’ training courses the participants come from both sides: there will be some who know a lot about gender but very little about energy, and others who are energy experts but who do not understand gender issues. In our experience, mixed groups can be very stimulating and provide perhaps the best means of mutual learning and support. In particular when dividing the class into small discussion groups, try to ensure that they are as heterogeneous as possible.

Indeed, the very best training strategy may be to have two types of trainers – gender trainers and energy trainers (although both will need to have studied the training manual in detail before carrying out the course). Our experience is also that the best results are obtained when both male and female trainers are present. Although most gender trainers are women, there are also male gender trainers, and this in itself can be an object lesson for many participants!

A number of methods for building knowledge and skills are recommended in the trainers manual.

Presenting the material

The theory needed for this course is presented as text in the module. This text is divided into different units dealing with specific aspects of gender and energy policy. A unit is divided into sections and subsections.

Participants do not have to read the material before each session. However, the trainer can advise the participants to do so, because this will increase understanding and will allow participants to ask relevant questions during the session. The trainer can decide to go through the text section by section, allowing room for questions and discussion about the subject at the end of each section. The suggested pace in going through the text is five minutes per page of text, and where there are discussion points and case-studies extra time should be allocated as indicated. The time allowed for discussion points, etc. is given in the more detailed unit description later in this manual.

An example of way that the trainer could plan to deliver the first two subsections of Unit 1 is as follows:

<i>Time</i>	<i>What is covered</i>
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<i>13:00-13:05</i>	Introduction to the Unit
<i>13:05-13:10</i>	Present 1.1
<i>13:10-13:15</i>	Discussion
<i>13:15-13:20</i>	Present 1.2
<i>13:20-13:25</i>	Discussion
<i>13:25-13:40</i>	Present 1.3
<i>13:40-14:10</i>	Discussion Point 1.1
<i>14:10-14:15</i>	Present 2
<i>14:15-14:20</i>	Discussion
<i>14:20-14:25</i>	Present 2.1
<i>14:25-14:30</i>	Discussion
<i>14:30-14:35</i>	Present 2.2
<i>14:35-14:40</i>	Discussion

Discussion points

The discussion points are mostly based upon questions related to the text. The aim is not to reach a consensus but to exchange experiences, ideas and opinions with the participants. The trainer should act as a moderator during the discussion points. They should explain what is involved in the discussion point and give participants the opportunity to react. Sometimes, in the detailed description of the units, alternative approaches are suggested for dealing with the discussion points. The trainer does not have to include all the discussion points and can supplement the text with their own questions to stimulate further discussion. If time is short, discussion points can be omitted.

Exercises

Exercises are meant to reinforce a participant’s understanding of the theory. Each exercise starts with advice on the way to proceed and, in the detailed description of each unit, these exercises are explained in detail. Participants do the exercises either as individuals or in small teams. To round an exercise off, the trainer can ask one individual or a team to read their solution aloud and let the others react to this solution in a discussion. The task of the trainer is to ensure the discussion leads to some form of conclusion. The detailed descriptions given below provide suggestions about the type of answer that can be expected and, occasionally, model answers are given. However, the trainer should be aware that most exercises do not have only one ‘right’ answer since much depends on the context.

Case-practices

As with Modules 2 and 4, the theory in Module 5 is supported by case-practices in which participants will have the opportunity to practice their new skills. A difference to Modules 2 and 4 is that the case-practices in Module 5 are not continuous throughout the module. Instead, on two occasions (after Unit 3 and after Unit 6) the participants will spend about seven or eight hours on a larger assignment.

Both case-practices are described in detail in the module. Participants will work on them in small teams (ideally of three). The trainer is advised to give some thought about the composition of these teams based on the experiences of the participants (which will have been identified in the introductory meeting and in Unit 1). The teams should be balanced: experienced with less experienced participants; female and male participants equally divided among the teams. Team composition should also be different for the two case-practices.

The first case-practice deals with the OOPP framework described in Unit 3. If the participants have difficulty in understanding the framework, some additional time can be used at the beginning of the case-practice period for further explanation.

In the second case-practice, participants will take part in aspects of a project proposal development process. In this case-practice, all the knowledge and skills from the module will be drawn upon to respond to a fictional Terms of Reference. As time is limited, participants will have to make decisions on which are the more, and the less, important elements of the project proposal development process. The trainer will need to help the participants with this.

Further instructions are given later in this manual.

Specific activities

Introduction and meeting other participants

The course should start with a general introduction. Qualified trainers have their own approaches to opening training sessions, e.g. using ice breakers. The points given below are only intended to be suggestions of activities that could be included:

- Presentation of the trainers: who they are, what they have done, their expertise.
- Background to the “Gender Face of Energy” programme.
- Introduction to the course: go through the time schedule; explain the working methods; explain the main concepts.
- Introduction to the subject: why it is important and what the participants are going to learn.

Next, the participants should have the chance to meet each other. This can be done in a presentation round. Let each participant give (at least):

- Their name and details of the organisation they represent;
- (The country they are from);
- Their expertise;
- What they expect to learn during the course.

To make everyone relaxed and acquainted with each other it can be useful to also let the participants tell something about their personal life: their hobbies, the last book they read, etc.

Exchange of experiences

Exchanging experiences is an important part of the learning process. Finding out their levels of experience is also useful for the trainer: for example, for grouping the participants for the exercises. The exchange of experiences can be achieved by letting each participant report on:

- Their experience with gender/energy/project formulation

- The projects they and their organisation have worked on;
- Their good and bad experiences;
- An anecdote about a project they were involved in.

After each presentation (keep them short!), the other participants should be allowed to ask questions.

Expectations

Participants can be asked to write down on cards what their expectations of the course are. These can be pinned to the wall and can be reviewed from time to time during the course to see if any of the expectations have been met. The final review should take place during the course evaluation.

Free time

It is expected that the participants will be given a free afternoon midway through the course. The course organisers could decide to organise a visit to an appropriate project and/or to provide the participants with the opportunity to visit a tourist attraction.

Closure of course

The following can be included in the final session:

- Provide time for the participants to ask some final questions;
- Try to collect some final thoughts about the contents of the course by using the notes made at the initial meetings (have the participants learnt what they wanted to learn? how do they look at their own experiences after the course?)
- Let each participant give their best (or most interesting) learning experience during the course.

This final meeting can also be used to hand out evaluation forms, additional materials about the course, etc.

Detailed description of the units

Over the next pages you will find a detailed description of the eight units included in this module. The description is there primarily to provide additional information about discussion points and exercises. Besides reading this description, the trainer is advised to read and understand the entire module. The times shown within brackets are the times that we think should be spent on specific activities. The trainer will need to make an assessment of what material to include in the classroom sessions and what material can be left for self study.

Trainers guide to Module 5

Unit 1

The first phase in the project proposal development process should always be an analysis of the current situation in a country. In the context of this course, this analysis should be focused on gender and energy issues. In previous modules (especially Module 2) a lot of tools and background information on this kind of analysis was provided. If participants have difficulty in understanding the theory in this unit, the trainer can refer to Module 2.

As in the other modules, the first unit is also used to discuss the experiences of the participants with gender and energy. This exchange by participants of their experiences in project proposal writing (both process and content) should not be limited to Unit 1 and the indicated discussion points: participants will learn a lot from each other and therefore the trainer should always give participants time to explain their own experiences related to the theory under discussion.

Discussion point 1.1 (30 minutes). This discussion point aims to refresh or stimulate the participants' thinking about gender issues in relation to energy services. The discussion should take place as a plenary group. The trainer can monitor the discussion and, if appropriate, advise participants to read Unit 1 of Module 1.

Exercise 1.1 (20 minutes) is about the motivations of participants in attending the course. Participants will answer the questions individually (10 minutes) and then discuss their answers with another participant (10 minutes). If there is some more time available, the trainer can discuss the main results of the exercise with the whole group.

Exercise 1.2 (25 minutes) is organised the same way as the previous exercise, only this time with more focus on their experiences with project proposal development.

Exercise 1.3 (15 minutes). This exercise is included to help the trainer organise the parallel workshops later in the module. There are seven workshops, each dealing with a different subject. In a five-day workshop, if there is only one trainer, there is only sufficient time for four workshops. If there are two or more trainers, workshops can be held in parallel since they are all of two hours duration. We recommend that Workshop 1 be made compulsory since the topic (Communication) is the basis of other workshops and some of the exercises in the other workshops. In this 'exercise' they indicate which workshops they want to follow, thereby allowing the trainer to plan which workshops to include.

Unit 2

The project proposal development process is usually initiated by a specific type of assignment offer (call for proposals, tender notice, direct approach by funding agency, etc.). This unit describes the process of reacting to a call for tenders, Terms of Reference and how to react on them, the roles to be filled in the project proposal development process and the assessment of the project market. For additional information on the last element, the trainer can use the information in Module 4 on assessment of stakeholders.

Table 2.1 in Section 1 gives an overview of the contents of Units 1 and 2 based on the elements of a letter of invitation used for an assignment. Table 2.2 gives an overview of the project proposal development process. These tables form part of the backbone of the contents of this module.

Exercise 2.1 (30 minutes). In this exercise, participants will work in small teams on generating project ideas based on a case-description. In the first 20 minutes, the participants will read the case (this can be done as a team) and generate two project ideas. After 20 minutes all the teams will explain their ideas to the whole group.

Exercise 2.2 (60 minutes) is intended to give participants some experience with Terms of Reference. The appendices to this module contain two fictional ToRs. These are quite long and it will take a considerable time to read and analyse them. Therefore the trainer should stress that the participants should try to summarise the ToRs quickly and that they should divide the tasks up within their pairs.

Table 2.3 is illustrative. Other possible combinations of expertise and tasks exist.

Table 2.4 presents some multilateral and bilateral funding agencies. If there is time, the trainer can include a brief discussion in the form of a brainstorming session in which participants try to add more agencies to this list. Also, a brief discussion about participants' experiences with project proposal development and various agencies could be beneficial.

Discussion point 2.1 (15 minutes) enables participants to share their experiences and give tips on how to deal with resistance to including women in project proposal development.

Discussion point 2.2 (10 minutes) again enables participants to share experiences. This discussion point can be omitted if time is short.

The questions in **Exercise 2.3** (30 minutes) are answered on an individual basis (20 minutes) and the answers are then discussed with another participant on a one-to-one basis for the remaining ten minutes. The exercise is designed to develop skills in assessing organisations as potential partners in a project proposal. The exercise begins with an analysis of the participant's own organisation to look for strengths and weaknesses. The next step is to evaluate other organisations and individuals to see if they could be useful partner organisations and compensate for the identified weaknesses within the participant's own organisation. The overall aim is to build a higher standard of professionalism through consistent practice at different stages of the project development cycle.

Unit 3

The third unit of this module deals with project identification and project planning tools, as well as with monitoring and evaluation activities. At the heart of this unit is the OOPP framework and the methods used in this framework. This methodology is used by a number of development agencies, such as GTZ, and it is quite possible that some participants will already be familiar with OOPP. Participants can be invited to share the experiences with OOPP but the trainer should guard against this descending into a “war of words”. There is, in some quarters, strong negative feelings about OOPP, and participants are entitled to share that view. OOPP is not presented here with any sort of endorsement by ENERGIA but due to the fact that it is required by many funding agencies.

Exercise 3.1 (30 minutes). This exercise is intended to let participants try the Metaplan combined with a problem tree analysis. Participants should spend the first five minutes writing down their ideas about the causes and effects of the problem (the problem being the low number of women in decision-making positions in the energy sector) on cards - one idea per card. In a plenary session, the trainer then needs to get the cards organised: first by dividing them into causes and effects, then by trying to link the causes to the effects. Participants can help in sorting the cards, which can then be pinned to a wall, with the trainer functioning as a moderator. A description of the method is given in Section 1.2. The process should take 20 minutes. Afterwards, in a general discussion, participants can give their opinion about the method. Did they like using this method? When do the participants think this method would be the most useful? What would they do differently next time?

Discussion point 3.1 (10 minutes). This discussion is carried out in a plenary session. The trainer should ask which participants have experience with the Metaplan method and, after that, ask the group what they think of the method. The same comment applies when asking about OOPP.

The next method (the problem tree) is described in more detail in Module 4. The trainer can refer to this for more background on the method. It is especially important that the trainer focuses on the translation from a problem tree to objectives. Formulating objectives requires care!

After Table 3.2: participants may want to discuss their experience with the Logical Framework Approach. If time is left, use **Discussion point 3.2** (10 minutes) to share participants’ experiences with the approach.

Exercise 3.2 (40 minutes) is completed on an individual basis. Participants should answer the three questions based on their own experiences and opinions. After 25 minutes, results can be shared within the complete group by the trainer asking one participant to read their answers out and then asking the other participants to respond (was it the same for them or different? suggestions for improvement?) (15 minutes). To give everyone an opportunity to receive suggestions for improvement, participants could put their material on large sheets of paper and pin these to the wall. During breaks everyone then has the chance to look and comment.

Case-practice 3 (7 hours). This lengthy case-practice is designed to familiarise participants with developing a Logical Framework (LF) for a project proposal. They will use an OOPP to identify the elements of an LF. The ideas for the project proposal are to be generated during a role-play exercise set in a village which is experiencing a problem with its electricity supply. A number of roles of different but “typical” villagers have been developed, and these can be found in Appendix 1 of the trainer’s manual. These role notes are not included in the participants manual. Therefore, each role needs to be copied for distribution. There are six specific roles plus male and female villagers. The trainer needs to distribute the roles. If there are a large number of ordinary villagers, the trainer could divide them into older and younger men and women. The trainer can develop extra character roles if they so desire. The trainer needs to give some thought as to whether or not they will be the CBO representative and guide the process - or whether to let one of the participants assume this role. There are no instructions for this role, so the trainer should spend some time with the participant (if one is to

play this role) to decide how it should be played. The quality of the facilitation is important since the rest of the exercise depends on the output of this enacted meeting. The role play lasts for an hour and the output is a problem tree. The participants then work in their groups on converting the problems into objectives, and then writing a Logical Framework. Up to 4.5 hours can be allocated to this step. Participants with experience will probably need less time. A further 60 minutes is allowed for presentation of the LFs. A detailed time schedule is given in the participants manual at the end of Unit 3.

Exercise 3.3 (25 minutes) can be skipped if time is short. However, this exercise can be used to give participants a better understanding of the gender-sensitive project cycle. In groups of three, participants can indicate where, in the generic project cycle, they would include gender-sensitive tools, methods, etc. After 15 minutes the trainer can invite groups to share their conclusions in a short plenary session (10 minutes).

Unit 4

This unit focuses on organisational assessment in the project proposal development process and especially on the gender profile of organisations. This assessment is focused both on participants' own organisations, and on other organisations that will be contacted during the project proposal development process. For more background on this unit, the trainer can refer to the tools document in Module 3, to Module 2 and to elements from Module 4. In Section 3 of Module 4 references to some other tools are also made.

Discussion point 4.1 (15 minutes). This is an introductory discussion about the experiences of the participants in relation to organisational assessment.

Tools for the analysis of the gender profile of organisations. Two tools were specifically developed for use in Module 3 of “the Gender Face of Energy”. Here they have been adapted for use in developing project proposals. An important point for the trainer to emphasise is that the questions are not “fixed”- participants are free to adjust and adapt the questions to meet their own circumstances. Participants should be given the opportunity to read through the tools and to ask for clarification.

Exercise 4.1 (30 minutes). Participants should individually answer the questions on organisational assessment and strengthening in this exercise (15 minutes). Next, they should discuss their answers in pairs (10 minutes). The trainer can spend the last few minutes asking participants how they feel about these new skills. Again the aim is to improve the professional approach of NGOs.

Unit 5

This unit offers participants the opportunity to improve specific skills relevant for project proposal development. This unit has a different construction than the other units in this module. The unit is subdivided into workshops. Each workshop is based on one of seven specific skills considered necessary to be successful in project proposal development:

- Communication;
- Data collection;
- Interviewing;
- Negotiating;
- Formulation and assessment of CVs;
- Planning and budgeting;
- Effective writing

The number of workshops offered will depend on time availability and interest – as well as the number of trainers available. It is strongly recommended that Workshop 1 on *Communication* is made compulsory and taught first, since this is the basis of all the other skills, and some of the other workshops will draw on skills learnt in this workshop. Each workshop is designed to last for two hours and, based on a five-day workshop, it should be possible to hold three workshops in addition to Workshop 1. If there are two trainers, workshops can be held in parallel which will increase the options open to the participants.

However, since project proposal development is teamwork, there is no need for participants to master all the relevant skills: team members can pool their individual skills and also learn from each other.

The trainer should have clarified in Unit 1 which skills the participants want to improve. Based on this, the trainer will need to choose which workshops to run, and allocate the participants to them (if options are offered).

Workshop 1 *Communication*

The focus here is on verbal communication although the workshop begins with some general guidelines for all forms of communication (Table 5.1). There are two activities. The first one relates to making a request through a telephone call. This communication medium is quite challenging since non-verbal elements make up a significant part of the message we transmit in a face-to-face communication. **Discussion point 5.1.1** (15 minutes) asks participants for their experiences with telephone calls and can be used as an introduction to Activity 1. **Activity 1** (40 minutes) involves three role playing exercises related to telephone conversations. These roles are not in the participants manual but are contained in Appendix 1 of this manual. Therefore, each role needs to be copied for distribution. This approach is taken because it makes the simulation more realistic if participants do not see each others roles. The trainer should organise three pairs of participants, one to take part in each role-play exercise . Ideally, form pairs of a male and a female participant. Allow each pair five minutes to prepare and then five minutes for the “telephone call”. Again, to make the simulation more realistic, the “caller” and “receiver” should sit back-to-back to ensure facial communication and body

language do not play a part. For those participants without a role some questions are provided in the manual for the discussion at the end.

The second activity is related to giving a presentation. It is not so much about the presentation itself (although Table 5.1.1 does give tips on improving the quality of presentations – which the trainer can use if there is time) but about dealing with the unexpected things that can go wrong when you stand in front of an audience. For those without a lot of experience in dealing with such “events” they can turn an already nerve-wracking situation into a nightmare. **Discussion point 5.1.2** (10 minutes) leads into **Activity 2** (40 minutes) in the form of a brainstorming session about all the things that can happen to a speaker. The trainer should try to reach consensus on which are the top three “nightmare situations”. These three events will form the basis of Activity 2. Three participants will each give a five-minute presentation on a gender and energy topic during which one of the things will happen. Send the three participants out of the room to allow them to prepare their presentations (10 minutes). Meanwhile, the trainer should organise, with the remaining participants, for the “happenings” to occur – who will “make the sound of a telephone”, “chat to someone”, etc. Also the trainer can discuss with these participants what they could expect from the presenters: how should they react to the “worrying” happening, and what is allowable in terms of reactions, etc?

After the presentations, the trainer should discuss the exercise and try to reach a conclusion about how to best deal with the things that happened.

Workshop 2 *Data Collection*

A distinction is made between gathering field data in communities (which is the subject of this workshop) and gathering data through more formal interviews with key informants (which is the subject of Workshop 3). There are of course some commonalities, and participants are encouraged to read the material from Workshop 3 if they are not going to also follow that workshop.

Module 2 includes specific tools for energy projects since these are not well served by the standard gender tools such as the Harvard Model. Here, in this workshop, three data gathering tools are presented:

- In-depth interviews;
- Local histories and time lines, and;
- Focus group discussions

Discussion point 5.2.1 (15 minutes) enables an exchange of experiences about gender-disaggregated data collection and the tools and approaches used.

Section 2 focuses on in-depth interviews. **Discussion point 5.2.2** (5 minutes) is a quick brainstorming period about the groups that could be interviewed in a village survey (a brief sketch of a “typical” village is given). The trainer should ensure that the suggested groupings have a gender balance. Table 5.2.1 gives an outline for a semi-structured interview although the questions will depend on the context. However, what is important is the way in which the interview is formulated. The issues are first identified, then specific energy and gender questions are formulated. The interviewer has also to prepare some supporting questions/comments if the conversation gets stuck. **Discussion point 5.2.3** (10 minutes) reviews, in a plenary period, structured questionnaires and semi-structured interviews. This discussion leads into **Activity 1** (40 minutes) in which participants work in pairs. One partner will design a structured questionnaire and the other a semi-structured interview for a field situation given in the participant’s manual. They test their designs on each other (which is an important part of preparation for field work) and then discuss with each other their experiences in Discussion point 5.2.3.

Activity 2 (30 minutes) is undertaken in pairs. Participants will try to create a timeline and history trace for an area they are familiar with (it can be a project area about which they have knowledge spanning a number of years or their own home area). Each participant will take it in turns to interview their partner. Participants should pin the results on the wall so that they can quickly review each others' efforts. What are the differences? How did they find the methodologies?

The last section is on focus group discussions. **Discussion point 5.2.4** (15 minutes) reviews participants' experiences with this method which is not as easy to use successfully as some think. The danger is that the data gatherer leads the discussion rather than passively listens.

Workshop 3 *Interviewing*

A distinction is made between gathering field data in communities (which was the subject of Workshop 2) and gathering data by more formal interviews with key informants (the subject of this workshop). There are of course some commonalities and participants are encouraged to read the material from Workshop 2 if they are not going to also follow that workshop.

Interviewing in this context is limited to gathering qualitative data from a key informant who may be someone more senior (older) than the interviewer. The basis for successful interviewing is good preparation. The first part of the workshop gives advice on how to prepare for interviews. **Discussion point 5.3.1** (20 minutes) is a plenary discussion about dealing with gender issues which can arise during an interview between people of the opposite sex. Participants are asked for their suggestions about how to deal with these situations. It should be made clear that answers will be culturally-specific.

Activity 1 (20 minutes) is completed on an individual basis although participants are asked to form pairs for later in the workshop. Participants are asked to prepare an interview which should last about ten minutes. The focus should be on the structure of the interview using Table 5.3.3 rather than on the breadth of coverage. It is quite possible that with a very busy person you might only get ten minutes for an interview!

The next section deals with procedures during an interview, including how to record the information the interviewer is receiving. **Discussion point 5.3.2** (10 minutes) is a short discussion about the best method for note-taking during an interview. If time is short, this discussion point can be omitted. In **Activity 2** (30 minutes) participants work in pairs using the interviews they developed in Activity 1. One participant interviews their partner, they evaluate the process; and then they swap roles and repeat the process. **Discussion point 5.3.3** (10 minutes) can be used to evaluate the process of preparing and conducting interviews. The final section deals with what to do after the interview, and advice is given on evaluating the process and using the output in preparing for other interviews.

Workshop 4 *Negotiating*

A very different set of skills is needed for negotiating to those required for interviewing. Here we are dealing with a process where people want to reach an agreement because they want to work together. This is not the same as political negotiations which are about power struggles and are conducted in a

totally different atmosphere to people trying to work together to develop a project proposal. (That is not to say that project proposal development is not without its tensions!) The trainer must make the nature of the negotiations that are the focus of this workshop very clear to avoid later confusion. **Discussion point 5.4.1** can initiate the workshop by participants exchanging their experiences of being involved in negotiations. There are different styles that can be adopted in negotiating and three are shown in Table 5.4.1. These three styles can result in different outcomes and the trainer should discuss with participants which they think is most likely to reach a satisfactory outcome. Do they recognise these styles? **Activity 1** (35 minutes) is a short sketch involving a man and a woman who are negotiating over a contractual position. Participants should read the sketch and try to identify which styles are being used at particular points in the dialogue (ten minutes). Ten minutes should then be spent discussing their answers with a partner and then a fifteen-minute plenary discussion can examine whether or not the group agrees with Miriam's approach to the situation.

Activity 2 (40 minutes) and **Activity 3** (40 minutes) focus on different topics in negotiations.

Activity 2 needs participants to work in pairs and they will take on different roles. The trainer needs to make sufficient copies of the roles found in the appendix to this manual. Participants work in pairs for 20 minutes and then there is time to exchange experiences in a plenary group. Activity 3 needs the participants to work in groups of four. They have to try to reach a consensus in 20 minutes - which reflects a not uncommon situation.

Workshop 5 *Formulation of CVs*

Participants need to have their own CVs ready for this workshop. **Discussion Point 5.5.1** (15 minutes) asks participants to work in pairs and to make an initial reaction to their partner's CV. First impressions are significant so the way a CV is presented, as well as the contents, is important. **Discussion point 5.5.2** (10 minutes) follows immediately with a plenary discussion about what participants consider to be the most important elements in a CV. This leads into the next section about what should be in a CV that is to be used in a project proposal. **Discussion point 5.5.3** (20 minutes) is a plenary discussion about the elements of a CV. **Activity 1** (60 minutes) uses the output of this discussion for participants to reformulate their own CV (based on the given format) which is then exchanged with a partner. Here the aim is not only to write a better CV but also to critically assess other CVs since participants may be required to do this when selecting and hiring additional staff for a project.

Workshop 6 *Planning and Budgeting*

Discussion point 5.6.1 (10 minutes) reviews participants' experiences with planning and budgeting. The aim of this workshop is to try to get NGOs to operate in a more strategic way by thinking ahead instead of experiencing a more precarious existence of waiting for donors to come along with financing activities. An example of a strategic planning framework is given, and the plan of action as a planning tool is introduced. **Activity 1** (30 minutes) is an opportunity to practice, albeit at a rather simplistic level, these skills. Participants work individually for 20 minutes and then, for the remaining 10 minutes, exchange their experiences with a partner.

The budget is at the heart of any proposal. A mistake here can be costly! If you under-budget and win the tender it can create problems with delivering the output. **Discussion point 5.6.2** (10 minutes) asks participants for their organisations' experiences in terms of whether budgets determine whether or not they win a tender. Again it is not possible to produce a budget for a large project, so participants are asked in **Activity 2** (30 minutes) to prepare a budget for the meeting they organised in Activity 1. The aim here is for participants to recognise that there are many elements, even for such a simple activity,

which have to be costed. For a real proposal, with many activities, budgeting becomes even more complex.

Workshop 7 *Effective writing*

Effective writing is part of good communication but is much neglected. The participants are asked first to focus on their audience which should always determine the content of any written material. **Discussion point 5.7.1** (15 minutes) is a short exercise undertaken as a plenary group which analyses three sentences from an energy report and the way different professionals will view this material. Different forms of writing are explained (Table 5.7.1) and participants are asked in **Discussion point 5.7.2** (10 minutes) to say which forms are most appropriate for a project proposal. Some tips on writing clearly are given in Section 4, and **Discussion point 5.7.3** (15 minutes) is a plenary discussion in which participants are invited to add to the list.

Activity 1(80 minutes) is an exercise in report writing. Participants have 40 minutes to write an individual report with specified objectives. Participants will then swap their reports with a partner. Using the given evaluation criteria, participants assess their partner's report (15 minutes) and then give each other feedback (10 minutes in total). There is then a short period for a plenary exchange of experiences.

Unit 6

In Unit 6, all the information gathered in the previous units is combined into the final project proposal. The case-practice at the end of this unit is about writing a project proposal for a fictive project (based on the fictional ToR that were analysed in Unit 2).

Table 6.1 gives an overview of the contents of Units 6 and 7 and is the second part of Table 2.2. If the trainer feels it necessary, they can present the whole of Table 2.2

Figure 6.1 summarises the outline of a typical project proposal. This is for illustrative purposes only. Funding agencies will have their own format which should be adhered to! Participants should be given 15 minutes to read through this summary.

Discussion point 6.1 (30 minutes) is related to Figure 6.1. If time is short the trainer can select some of the elements listed in the figure for discussion by the participants in response to the questions in the discussion point. The aim is not to achieve a perfect answer, but for the participants to understand the general ideas.

Case-practice. Eight hours are allowed for this assignment. The trainer needs to form groups of three, trying to balance the skills, experiences and backgrounds of the participants. The aim is to produce a proposal with a maximum of eight pages which responds to the TOR in Appendix C in the participants manual. The elements that should be included are detailed in the participants manual since it is unrealistic to expect them to develop a full proposal in the time allowed. All groups are to give a 15 minute presentation which forms part of the proposal assessment. The trainer should be strict about time and not allow participants to go over their allotted time. The trainer will need to adjust the time allowed to work on the proposal and the presentation to give all teams time to present. If there are six teams, presenting will take 90 minutes! A scoring scheme is given at the end of the case-practice. The trainer needs to read and mark the proposals and announce the winner. The schedule for the next day needs to be planned so that the trainer has time to read the proposals and provide feedback.

Unit 7

The seventh and eighth units of this module deal with evaluating the process. This step is often neglected and it is therefore important that the trainer stresses how important evaluation is, even though it is now the end of the training course and participants have already written a project proposal.

Discussion point 7.1 (15 minutes) lets participants talk about their experiences with evaluation of, and feedback on, the project proposal development process. This discussion is done as a plenary group.

Discussion point 7.2 (15 minutes) is meant to add to the list of evaluation points. Give the participants at least five minutes to think about other relevant issues for themselves. After that, a plenary discussion can be used to see if the list can be usefully extended. Too many points can become a burden.

Finally, **discussion point 7.3** (15 minutes) deals with the things that should be done with the results of an evaluation. The point is that evaluation has a useful role for the future – it is not only about looking at the past.

UNIT 8

This last activity is generic to all the modules. It is intended to help participants with re-entry into their workplace.

Time should be made available for the participants to at least write their action plan (60 minutes). The trainer should circulate around the group while the plans are being prepared, offering support and advice where necessary. If possible, participants should also be able to present and discuss their action plan in a plenary session (10 minutes presentation plus 5 minutes feedback per participant). Alternatively, they could present them as a poster, and the group can circulate and make comments and suggestions - either verbally to the owner of the plan or by adding written comments.

The trainer could make a copy which could be kept by the course organisers for their own follow-up and to evaluate the impacts of the training. Participants should be informed of this fact.

EVALUATION AND CLOSURE OF THE COURSE

Three hours are allocated for this session.

The first component is providing feedback on the proposals developed as part of the Case-practice in Unit 6. The trainer can announce a winner if this is considered appropriate.

An evaluation form is included in the participant's manual (although the trainer is free to use their own form). Participants should complete the forms and they should also be given a chance to give verbal comments on the course. (45 minutes)

The final activity is to deal with any remaining questions, to hand out certificates and give votes of thanks etc. (45 minutes)

APPENDIX 1: ROLE PLAYS

UNIT 3 CASE-PRACTICE

POWER SUPPLY IN THE VILLAGE OF SHAMARA

ROLE: MR BOMA, HEAD OF THE VILLAGE

You are the chairman of the meeting, you open the meeting, and welcome everybody and you explain the objective of the meeting. You introduce the moderator who is there to help reach a consensus about the problems related to the electricity supply in the village. You see this process as the first step towards being able to make a proposal to Mr Rumova to improve the electricity supply and make the villagers happy! As the most important person in the village you feel that you should give your vision of the problem first.

Mr Ramova, head of the Regional Rural Energy Planning Unit of the Ministry of Mines, Energy and Water, has asked you whether there are possibilities for another type of energy system. You told him that the coffee mill produces about 2,500 tonnes of dry coffee per year. During the process, about 700 tonnes of coffee husks are produced and, currently, this is considered as a waste material. There may be possibilities to use the material in an electricity production unit.

You try to promote a definite solution to the energy problem. Although you know that the insufficient capacity is not the only cause of the energy problem in Shamara, you believe that everything should be done to get a new generator as soon as possible.

One of the problems you have as the person responsible for the entire electricity system is that the people of Shamara are not willing to pay higher prices for the delivered services. Even for diesel it is difficult to collect money.

Further, during the last few years many people from outside have come to live in Shamara. They have connected themselves to the grid, and few of them can afford even the low monthly charge. This has resulted in one part of the village in particular overloading the grid so that problems have arisen in grid distribution

ROLE: MR MOVALOAD, THE TRANSPORT OPERATOR

As a private entrepreneur and the owner of the only three 10-ton trucks in Shamara, you are effectively responsible for the transport of diesel to Shamara. However, you do not like transporting diesel: the problem is that there is never money to pay for the transport costs, and taking the women in the village to the market in Harasha, 15 miles west, is more profitable. Further, they do not like it when you carry smelly diesel together with them and their merchandise.

During the coffee-picking period, which is at the end of the wet and the beginning of the dry seasons, you work full-time transporting coffee from the coffee farms to the coffee mill of Mr Garjee. You think he is a very sound businessman and would like to know how he affords his Pujaro (four-wheel-drive vehicle). You feel that the entrepreneurs in the village need to put up a united front against the villagers who just don't seem to realise how fortunate they are.

You consider the major problem in the region to be the terrible condition of the road. Your trucks, only six, four and two years old, deteriorate very fast. If things keep on as they are, you fear that by the end of the year you will have to take one truck out of service.

You sense that Mrs Njector is angry with you. She has asked you to bring a refrigerator from the regional health office, 80 miles away, but you believe she will not have the money to pay for the transport.

ROLE: MRS I. NJECTOR, NURSE

Mrs Ira Njector, the health centre nurse based in the hospital, has also complained about the irregularity of the energy supply. A few years ago, the system never went down, whereas now, in her sector of the village, electricity is cut off for four to eight hours nearly every day. "Especially during the dry season the situation is desperate", she proclaims. "It is not only that the medicine may get ruined, but after the last power failure the refrigerator no longer functioned". She now has to wait until Mr Movaload, the only one in the village who owns trucks, brings her another refrigerator. In the meantime, a significant part of her medicine stock will probably be ruined. Naturally, the regional representative of the Health Ministry is very worried.

The electricity demand of the hospital is:

- Two refrigerators: each requiring 850W continuously;
- For lighting, office work and laboratory work: 2300W is needed from 4.00 am until 7.00 pm.

You are very upset with the whole situation. After a long period in which the electricity supply went off and on five times per day, and a period of three weeks with no electricity and hence no light at all, you feel something must be done, and as soon as possible. You worked for such a long time to organise your health centre, with the help of a Dutch mission organisation, and you feel that the intermittent power supply is destroying an important part of your work: the dispensary.

You are angry with Mr Movaload: he promised to bring your refrigerator from the regional health centre four weeks ago, but it seems he just does not want to do it.

ROLE: MR GARJEE, COFFEE MILL OWNER AND LOCAL ENTREPRENEUR

Since the coffee renewing programme started, now some six years ago, the amount of coffee you have to process has tripled. This means that you have a lot of work, and feel that you need a computer for your administration (computer, office lighting etc. requires 2.5 kW). Furthermore, for coffee processing itself, you need electricity for husking the coffee (three 2500 W machines). In addition, you are considering investing in automatic selection and transport equipment in the near future, but this would require an extra 10 kW of power from a reliable source. This equipment is essential to ensure your product quality and is the only way to guarantee acceptably high coffee prices in the future.

As owner of the coffee mill you are interested in Shamara's energy supply, but above all in the power supply to your coffee mill. Especially during the summer, the situation is a disaster: The hydro-plant does not function during the day, when you have to husk your coffee, and the grid is down. One solution to the problem would be to pay for the diesel, but this means that you would pay for the other people in Shamara as well.

At this moment you process approximately 2000 tonnes of green coffee per year. You expect that in the near future this might rise to approximately 2500 tonnes per year. For every tonne of green coffee processed, you get left with 275 kg of coffee husks, with a moisture content of 10-12%. The average energy contents of coffee husks is about 15 MJ/kg (LHV on a wet basis), and a friend of yours, who is an energy expert, has assured you that the coffee husks are more than enough to supply the entire village with power throughout the year.

As a consequence of today's coffee prices (which are rather good), you are happy to donate the coffee husks for power generation. You consider, however, that the plant should be located at your coffee mill, and that you should have preferential treatment when it comes to power supply.

ROLE: MRS NARAJA, THE SCHOOLTEACHER

The lack of electricity is playing havoc with the daily school routine, especially science lessons, and your ambitious plans to run adult reading classes in the evenings.

Consequently, you are not very pleased with the situation. You have worked as a teacher for five years in Shamara, but you are from another nearby village. You are a little surprised by the situation: despite the fact that the people of Shamara are rather well off, they are not willing to pay more for their electricity supply. You consider it has to do with the fact that people are used to the hydro-plant which, eight years ago, supplied more than 80% of the total energy needs of the village. Due to the expansion of the village, the capacity of the plant is no longer enough during the peak evening hours.

You feel it is time the villagers were made to face up to their responsibilities. Your home village has a good electricity supply which has attracted some small companies to set up businesses there and so create the type of jobs young people nowadays want. Your high standard of education and position in the community, you feel, gives you the right to speak out about these issues.

You also have wondered why the hydro-plant generates so little during the summer. However, when you walked to the reservoir with your family last Sunday, the fact that the river had so little water made an impression.

ROLE: MR GENREP, THE HYDRO-STATION ENGINEER

One of the reasons why the diesel generator has deteriorated over the last few years is that there was never money to perform the necessary maintenance. For oil changes you had to 'borrow' from Mr Movaload, but lately he has not been very willing to keep on helping. It has been extremely difficult to collect money in the event of needing new parts after a serious breakdown, and the repairs have often taken more than a month.

You feel a little uncomfortable with the situation: as a responsible person you have tried to keep the generator operating during much of the time, but you feel you failed. Although you understand, as a mechanic, the basics of maintaining the engine part of the set, you feel you could use some help on the electrical aspects of the set.

The hydro-plant has been the salvation for Shamara: during the wet season it has operated at 100% of its capacity. Only during the dry season does the plant let him down. Not because of the state of the equipment, but because the river's flow-rate has decreased. Ten years ago, during the summer, 60 litres per second flowed into the reservoir. This year, at the end of the dry season, only 20 litres per second were entering the reservoir. It is assumed that the water loss is related to clearing mountain areas for coffee planting.

You consider that the reservoir should be enlarged in order to be able to generate more electricity during peak hours (the head of the hydro plant is 90 metres and the generation efficiency 80%). On the other hand, you fear that, in the years to come, the hydro-plant will also need some repairs. Maintenance has already been postponed too often, and you fear that, within a few months, the hydro-plant will suffer from the same problems as the diesel generator.

ROLE: MALE VILLAGERS

You are one of many small farmers, who do some seasonal work for Mr Garjee and anywhere else you can find it. You generally distrust Mr Garjee, he's too rich for someone who makes a living from coffee growing and it's a much debated topic in the bars in the evening where he gets his money from. There is also something odd about his relationship with Mr Movaload, who is from a different ethnic group.

You feel Mr Genrep isn't a bad chap and he does his best. He is quite understanding about the problems you have meeting his bills and has been known to buy you a drink as a consolation.

There are a number of things bothering you at the moment. Work is a particular problem. Mr Garjee charges a lot to mill your coffee and pays low wages for your help during the coffee picking season. You could increase your output from your plot if you used electric pumps for irrigation.

The inward migration is bringing people who will work for lower wages than you are prepared to accept. You have heard that a "business park" (whatever that is) has been set up in nearby Harasha which has plenty of job opportunities, including for unskilled work, such as nightwatchmen, and the sort of office jobs using computers that young people want nowadays.

A number of the more progressive village men think that it is time to give women more responsibility and that they could be put in charge of the farm plots while the men could set up a fishing project in the hydro scheme reservoir. This has the additional advantage that it would take you away from home where your wives are complaining they can't use electric cookers, refrigerators etc. due to the erratic electricity supply. Even worse, those with TVs have often missed their football team scoring a goal due to power cuts at the vital moment.

A particularly serious problem is that the lack of fuelwood has caused disruptions in the supply of local brew and prices are rising. This means evenings in the bar are getting rather dull.

ROLE: FEMALE VILLAGERS

You are responsible for all the household chores and contribute to the farm plot work. You have your own small plot for growing maize and vegetables, some of which you sell at market. You are also involved in a women's co-operative which has a number of ambitious plans.

There are a number of issues that are bothering you and, as usual, the men of the village aren't interested. You seem to be spending more and more time searching for fuelwood. The women's group has got together to organise a credit bank which has been helping members buy electric stoves. These are a big improvement on the wood stoves and a lot safer than kerosene. However, you still need fuelwood for some jobs, especially since the electricity is so unreliable. This also creates problems with food spoiling in the refrigerators and those of you with a TV, although not having time to watch it, feel that it does keep the men at home instead of spending money in the bars.

It is not only at home that there are problems. There are your children. They need a good education to get a good job. You feel that Mrs Naraja is too busy minding other peoples' business and not getting on with teaching. Your women's co-operative wants to set up a women's adult literacy class in the evenings but this needs good light. This would also allow children to do their homework. You worry about what job prospects they will have in Shamara.

Children's health is also a concern. A few weeks ago a polio vaccination session had to be cancelled because the vaccine had been spoiled by the refrigerator being out of action for too long.

A Northern Fair Trade organisation would be interested in buying garments from the women's co-operative for export. Some of your men have been talking about taking up fishing. You see this as an opportunity if you were able to buy some of the fish to supply local markets. However, this would mean the fish would have to be transported by Mr Movaload. It would probably end up stinking of smelly diesel. Anyway you feel he is totally unreliable and far too friendly with Mr Garjee. He charges a lot of money to bring things from town and then leaves things behind if there is something Mr Garjee wants bringing.

You feel that the people who are migrating into the village are not having a good influence. Not only do they compete for jobs but one of them has opened a dance hall which you think can only lead to problems with the young people.

UNIT 5

WORKSHOP 1 ACTIVITY 1

Roles for 6 participants. The participant should receive only their own role.

Role-play 1: initial contact, instructions for caller (woman).

You are a member of a project proposal development team and you need to hire some extra staff with specific local knowledge of a rural area where you are planning an energy project. You have been allocated the task of calling the general project manager of a CBO unknown to you but active in that rural area to ask for the manager for the names and telephone numbers of appropriate people.

Role-play 1: initial contact, instructions for receiver (man).

As the general project manager of a CBO you are really busy. Therefore, you don't have time for a telephone call and especially not with a woman, who you don't believe has a serious request. You do not like giving the caller the names of your staff or other contacts, and you do not want to lose staff with other, probably more lucrative, projects on the horizon.

Role-play 2: arranged call, instructions for caller (woman).

After an initial telephone call you have agreed to call a professional back and talk about the possible implications of gender roles in a solar-cooker project for which you intend to write a project proposal. You do not intend to hire this person as part of the project implementation team. The professional has said he has some time to answer your questions. Ask him about his knowledge of the impact of similar projects on gender roles in the region, about his expectations for the outcomes, about his ideas to include women in the implementation phase, and any other interesting questions you can think of.

Role-play 2: arranged call, instructions for receiver (man).

You are a professional active in energy projects and have quite some knowledge on gender issues. Some time ago you agreed to give your opinion on a solar-cooker project to a woman formulating a project proposal. However, now she calls, you don't actually have that much time and you would rather get hired for the project than give away your knowledge for free. Try to impress the caller and try to talk her into hiring you.

Role-play 3: decision-making, instructions for caller (woman).

You are a member of a project proposal development team for a solar-cooker project. After some earlier conversations with an expert on the specific region where the project is to be located, you call to confirm some agreements and make decisions on things you have spoken about. The issues you will address are: will the expert confirm his availability as a guide for the project team in the implementation phase; ask the expert what the best time is to travel to the region to do the analysis, and what is the best time to implement the project. Try to make concrete decisions and keep the conversation short.

Role-play 3: decision-making, instructions for receiver (man).

You are an expert on a specific region where a project will be implemented about which you are very interested. You are expecting a woman from the proposal development team to call you to confirm your participation. However, you are not totally confident about the organisation's capacity in the field of solar energy, so you feel you should be giving her all sorts of advice, tips and especially talk a lot about the forthcoming project. Keep her talking as long as possible.

WORKSHOP 4 ACTIVITY 2

The trainer needs to make sufficient copies of the two roles. Half the group will be “the team member” and the other half “the professional”. The two halves should not see each others role.

Instructions for the team member:

The professional you want to hire is for work in the first implementation phase of your project. This phase starts in August and will last 13 weeks until the end of October. In previous negotiations you reached a consensus on the amount of time the professional will spend (160 hours) and the payment. Now you need to plan when, where and for how long the professional will be working for you.

You think that the professional will be of most use by working for 20 hours per week in each of the first eight weeks of the period. In that way, there will be some time at the end of the period for others to do more work if needed.

The professional will be important to others working on the project through giving guidance and support. Therefore, in an ideal situation, the professional will be available for direct, personal contact during their activities. Also, as you expect work to slow during the professional’s absence, it is preferable that the professional does not leave for more than a week during the working period.

Instructions for the professional:

Recently you agreed to work for 160 hours on the implementation phase of a project. You know that the period during which you have to be involved is the 13 weeks following the beginning of August. From your experiences with this organisation, you know that implementation phases usually get delayed and therefore, in your own planning, you have planned to work in the final few of these 13 weeks.

Besides this project, you have some other things you will be working on in the thirteen-week period that are better paid. The periods when you are working on these other things are hectic, and you would rather not work on the project during those weeks. The first two weeks you are away on an overseas mission. Although you are busy with other things, you could work for ten hours per week in this period. In weeks 6, 7 and 8 of the thirteen-week period you are again off on a mission, and again with no more than ten hours available per week. The tenth week you will be completely unavailable, because you will be on a family holiday.

Although you could do some work while you are on mission, you would prefer to work when you are at home. Ideally, in these periods, you would work for 30 to 40 hours each week.