The Gender Face of Energy
Trainer's Guide

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Preface

Energy is a basic need and a component of all productive processes. It is essential for development. Improved energy sources can improve levels of welfare, increase standards of living, and liberate people from darkness and isolation. Billions of people in developing countries have no access to modern forms of energy such as electricity and gas and often hardly use even kerosene, but depend on traditional biomass fuels for heat and light and their own metabolic energy for mechanical tasks. In many places, woody biomass is hard to find and people switch to using poor quality biomass.

There have been many programmes and projects set up to try to change this situation and to introduce improved energy technology – in particular, to introduce renewable energy technologies, such as photovoltaic systems, and technologies which conserve fuel, such as efficient wood stoves. Other approaches have tried to increase biomass supplies, such as fuelwood lots. By no means all of these programmes and projects have been successful, and one of the contributing reasons is that they have mostly been planned with scant regard for gender aspects of the energy problem. This manual is designed to support training of development planners and project managers to increase their capacity to bring gender aspects of energy into the planning cycle.

Two major target groups are envisaged:
- energy planners and project managers whose background is in technology but who recognize the need to address gender issues in their work and want to know how to do this
- general development planners, and particularly gender specialists, who recognize that energy may be a basic component of development, but who are not sure how to integrate this with other aspects of their work

The level of training assumes that trainees already have a professional education and some experience in the field of development work and development projects. Ideally training should be carried out by two trainers, one with a strong background in gender and the other with a good knowledge of energy technology for development. In our experience gender balance in the team helps to overcome the notion that "gender" means "women".

The manual is intended to provide materials for a course, but the length, of this will depend on how it is arranged. It is suggested that different modules be given at different times, or in different combinations. Experience shows that the first two modules can be given together in one course, which will take about 8 working days, including one for fieldwork and a half day "free". In a short course participants need to have a break from absorbing large amounts of new ideas and concepts. Such a break ensures that concentration in the second half of the course remains high.

The first two modules focus on *project planning* and use a participatory approach, including many well-known PRA methods of data gathering.

The manual does not use standard gender analysis tools, such as the Harvard Matrix, because these, in our experience, have not been very useful in the context of energy. Instead, a set of tools has been specially developed to help the planner work through gender aspects of energy problems in a systematic manner.

ENERGIA network members have begun to use the first two modules and as a consequence their experiences in using the material have lead to the first substantial revision for Module 1. Module 2 has successfully undergone field testing. The TIE-ENERGIA project funded by the European Union COOPENER programme has lead to the development of three new modules (Engendering Energy Policy; Gender Advocacy in Energy; and Engendering Energy Project Proposal Development: Capacity Building of Organisations). Another module is planned on Monitoring and Evaluation.

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CONTENTS OF THE TRAINERS GUIDE

The material in this trainer's guide is designed to be used in conjunction with the manual for the Gender Face of Energy Training course. The trainer's guide is in two parts: Part One provides specific information related to delivering Modules 1 and 2 of the training manual *The Gender Face of Energy* and Part Two is a general guide to organising and running a training course on gender and energy.

Acknowledgements

This manual was commissioned by ENERGIA, the International Network on Gender and Sustainable Energy. The original version was written by Margaret Skutsch, Joy Clancy and Hanke Leeuw of the then Technology and Development Group (TDG), (now the Department of Technology and Sustainable Development) University of Twente, in the Netherlands, to replace an earlier training manual developed by the TDG called G*ender and Energy: Training Pack.* Module 1 has been revised again by Joy Clancy based on feed-back from training given by ENERGIA as part of her capacity building activities in Africa and Asia. Module 2 has undergone field testing in Asia which have not lead to any revisions.

Major contributions were made by a number of individuals to the original and revised versions:

Otto Wormgoor tested some of the tools and suggested others during fieldwork carried out together with ITDG Kenya. He also developed the prototype for the framework that is presented in Module 2. While in Kenya, he was ably supported by Lydia Muchiri, Justin Nyaga and Martha Mathenge.

Beatrice Khamati wrote an introductory paper together with Joy Clancy, much of which has been integrated in Module 1. The paper is available in its entirety on the ENERGIA website at www.energia.org (under 'resources')

Nourallah Ahmed provided the data from Sudan which has been used for the major case study in Module 2, which demonstrates how the method can be applied.

Chesha Wettasinha provided many of the case studies used in the manual, by searching through the ENERGIA database and library.

Margaret Skutsch wrote a critique of the suitability of standard gender tools in energy planning, which formed the skeleton of the approach presented here. This paper benefited from comments from a large number of gender and energy experts and can be downloaded from the ENERGIA website. Joy Clancy has also written a paper on testing of the tools by three ENERGIA members in Asia (CRT Nepal, Aga Khan Foundation Pakistan and Govind Kelkar and Dev Nathan, India)

Marielle Feenstra wrote, together with Joy Clancy and Margaret Skutsch, an annotated bibliography which was used among other things to draw case study material from. Her bibliography is also available on the ENERGIA website.

May Sengendo from EATDN for suggestions on how to explain gender concepts. K.V.Ramini and Aliya Sethi who made valuable suggestions on revising the order of the material presented in Module 1 as well as stressing the need to make the poverty dimension of gender and energy more visible.

Annette Geelink was involved in reviewing an earlier version of the manual and her suggestions have been incorporated in this new version

Erik Kamphuis reviewed a draft and made some helpful suggestions, particularly as regards the practicability of the manual in training and the usefulness of some of the exercises.

Elizabeth Cecelski reminded us from time to time of the need for such a manual and encouraged us to revise the original version.

Sheila Oparaocha, from the ENERGIA Secretariat, kept the pressure on for us to complete the revision of the manual. The ESAMI trainers and the ToT participants from the TIE-COOPENER Project also gave helpful feedback which enabled us to refine the material.

Julia Ardesch and Annemiek van Breugel more than compensated for our weaknesses with Microsoft software and produced far more presentable material than we could achieve.

Joy Clancy and Margaret Skutsch
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PART ONE

TRAINERS GUIDE FOR THE MODULES

An Explanatory Note for Trainers

The format of the modules
The manual is divided into a number of Modules. The first deals with gender concepts and how these can be applied in the context of energy. The second presents a procedure and set of tools for examining the gender issues for a given project situation.

Each module is made up of a number of units, dealing with different topics. The time needed for each unit is indicated: it varies between two hours and one whole day. The first two modules, if done one after the other, will take about 8 days, on the basis of 7 to 8 hours per day. Depending on time available and the basic knowledge of the participants, the trainer should select those units which are most appropriate.

In the first Module, each unit consists first of a section of text, which includes some short case studies and some discussion points. Ideally this text should be copied for each of the participants. The idea is that the trainer will also present the material orally in classroom sessions, encouraging participants to engage in discussion about the concepts given, and the case studies, both in a spontaneous manner as well as on the discussion points that are provided. There are also exercises which may help to deepen the participants understanding of the issues at hand.

For each unit there is a short trainer's guide which gives some suggestions about how to treat the material for that unit and a set of exercises, each on a separate page. The trainer should choose which exercises she/he wants to use (depending partly on the time available) and copy the instructions for these exercises for the participants.   There are also some suggestions for follow up activities.

The second Module consists of five units, of which the first two follow the same patterns as those in module 1. Units 2.3, 2.4 and 2.5 however are a little different. Unit 2.3 is a complete case study, or worked example, showing the methodology and how to use the gender tools in a real energy project plan (the case study is for a village in Sudan). Unit 2.4 presents all the tools one by one. Unit 2.5 describes some data gathering methods. These units are not provided with exercises and discussion points, and need to be tackled in small group discussions rather than in plenary. These three modules may best be presented in parallel rather than in sequence. Trainers' notes explain how to do this.

At the end of each Module there is a reference list which gives the full bibliographic details of sources that have been used in the preparation of the manual, and also suggestions concerning how to get hold of useful materials such as audiovisual aids which could be ordered and used in the course.

Training methods
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 the gender issues. In our experience, mixed groups can be very stimulating and provide perhaps the best means of mutual learning. In particular when dividing the class into small discussion groups, be sure 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 beset 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!

Discussion groups are very useful when the exercises require reading and reflection, or discussion around a topic. But this is not the only means that can be used. A useful method can be 'meta-planning' – getting participants to brainstorm ideas on a particular topic, and write each one down on a card, which can then be stuck on the wall with tape. Choose two participants to help to sort and

organize these cards into groups.

A number of films are recommended (make sure they are ordered well before the start of the course!). It is best if the trainer watches the film in advance, and decides on some topics or questions raised by the film. Before showing the film to the participants, list these topics or questions on the board, and say that you are going to discuss them after the film. This helps the participants to focus on these items and makes the learning value of the film much higher. It has been found that the three films recommended, are all very useful in this course.

A large number of exercises have been provided, but it is not the intention that every one of these has to be used. It is entirely up to the trainers, exactly which ones will be used, and how. The material provided is only a resource to be used as circumstances dictate.

Field work

In order to test out and practice the gender tools, *it is essential that at least one day is scheduled for fieldwork.* This should be done in a village or community area where the participants are able to meet with groups of local people and interview individuals. Arrangements for this should of course be made well before the course itself takes place (transport etc must be arranged, and the village needs to be alerted to the arrival of the training group – permission from the headman or chairman may be required.

The tools to be used during the fieldwork should be decided in advance and the participants should work in groups of 4 or 5 in the field.

Additional resources for trainers

Since gender analysis is new in the field of energy, we have included some useful reading materials in Appendix 1, of Module 1. These are intended for the trainers to familiarise themselves with the field of gender and energy before starting. We have also included one good article on how the field of gender has itself developed over the last decade or so, for the benefit of trainers who may have had less experience in this field. The material is supplied on a CD prepared by ENERGIA – not only is this good for the environment but it also makes the suitcases of participants less heavy to carry home! The trainer may decide to print some of the material for use in class or for the participants to read in the evening as a supplement to aid discussion.

Feedback

This manual is new and we regard it as still being tested; this can only be done by the trainers themselves. Therefore we welcome comments of all kinds which will help us improve it and make it easier to use, more relevant, and more useful. Please do not hesitate to make your opinions known.

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Suggested schedule

If the entire course is to be given, it might follow the following schedule:

	Topic	Time needed
Day 1	Introduction and getting to	1-1.5 hours

	know the participants	
	Unit 1.1: What is gender? What is energy?	4 hours
	Unit 1.2 Why is gender important in energy planning and how can energy help women?	2.5 hours
Day 2	Unit 1.3 How to address men's and women's needs in energy projects	2 hours
	Unit 1.4 Identifying gender needs and goals	6 hours
Day 3	Unit 2.1 Gender analytic tools	1 hour
	Unit 2.2 Framework for gender analytic tools	2 hours
Day 4	Unit 2.3 Worked example	4 hours) if done in
	Unit 2.4	4 hours) parallel, total
	Unit 2.5 Participatory data gathering tools	2 hours) 8 hours (although this is depended on the experience of participants with participatory data gathering methods)
Day 5	Fieldwork	10 hours including getting to and from the site
Day 6	Write up, presentation and discussion	4 hours
	Unit 2.6 Action Plan	3 hours
	Evaluation and closing	1 hour

TRAINER'S GUIDE TO MODULE 1
UNIT 1.1

This unit introduces the fundamental ideas about gender and about energy. Which parts to cover and the level of detail will depend on the background of the participants. It is not necessary to include all the discussion points or do all the exercises. The trainer has to make a selection.

The unit begins by explaining the difference between sex and gender. It introduces the concepts of gender roles, relations, and contracts. It also introduces a well-known gender analytical framework which will be familiar to many who use gender analysis: *the triple role* (A second framework - *practical needs versus strategic interests* – is introduced in Unit 1.4).

Discussion points 1.1.1 and 1.1.2 can best be done in plenary and get participants thinking about the concepts. For people without any prior knowledge of gender concepts, it may take time to adjust to the ideas, since many people find them threatening in the beginning. Allow sufficient time for participants to express their feelings and let them debate together rather than taking the lead yourself in such discussions.

Exercises help with understanding the concepts and how to apply them. If participants are having trouble with the ideas, you could give them exercise 1.1.4, which is rather factual, before going on to the exercises which ask for a more personal view (1.1.1, 1.1.2 and 1.1.3). These exercises are rather straightforward and should not require further explanation.

Gender is concept which has evolved within the medium of the English language. Participants find it challenging to put the concept into their own language and so discussion points 1.1.3 and 1.1.6 have been included to help with this challenge including explaining the concepts at the village level. Please note that only a small number of the pictures from the original source (*Whose hands are these*) are included in the Appendix but these should be sufficient to get the ideas across. (NB The reproduction quality is poor since the original material is not of a high print quality.)

Discussion points 1.1.4 and 1.1.5 are quite political, although posed in a neutral way. They could bring out participants own personal feelings on whether or not they favour a real change in gender relations. This can arouse considerable debate and disagreement. By no means all women are in favour of changing fundamental gender relations, nor, of course, are all men opposed to this. At the heart of gender relations is the question of rights over property and over other people. What may come up in discussion is the fact that the law may provide, eg for equal rights, but that the practice is different.

Discussion point 1.1.7 relates to the "Triple Role" analytical framework and is a good one to do in smaller groups – also making a break in the middle of the session. Divide the participants into smaller groups to discuss the points, then each group could summarise their findings. If different groups have different answers, the trainer could pick up on these differences and stimulate debate among the participants.

The second part of the unit introduces some energy concepts in a relatively simple, not too technical way. Although most of the material is familiar to people with a technical background, there maybe some aspects, such as metabolic energy, that are not too familiar and should not be skipped. Metabolic energy needs to be substituted by other forms of energy to reduce women's drudgery and save their time – important issues which are neglected by energy planners. The text suggests that this should be measured and accounted for as a form of energy.

It is important for people who are used to dealing with electricity, for example, to recognise that for most women, firewood or even agricultural wastes is currently and probably for the foreseeable future in many places, a more important fuel. For those who work in villages all the time, it is important to see the wide range of possibilities including new types of technology, and to relate these to different

kinds of tasks or activities which people do. Table 1.1.1 gives an overview of these possibilities. The trainer should make sure that participants are familiar with all the technologies listed.

Some energy planning concepts are also presented including the energy chain. An example is given in the text. The energy chain is a useful planning tool and can be integrated with gender analysis. Discussion point 1.1.8 takes this up asking for other examples and also how the concept could help gender analysis. Such an analysis helps identify where women are or are not involved or are affected by the different stages in the energy chain. It is not only at the user end but at all stages of the chain. Such an analysis helps to identify where interventions are needed so that women can be beneficiaries of the energy supply chain as suppliers, users or indirect beneficiaries from reduced impacts.

Different ways of classifying energy sources are described. Quite a heated discussion can take place about which category to place a fuel in. Discussion point 1.1.9 could be done in plenary.

Two very important scientific concepts are "power" and "energy" which can be confusing to non-technical people particularly since in every day language we use the terms interchangeably whereas in physical sciences and engineering they have distinctly different meanings. Box 1.1.2 explains the difference. There is no need to labour this point but just to warn that these words can cause misunderstandings. Appendix 3 also contains reference material to support Box 1.1.2, including explaining the units. Also some illustrative examples of quantities are given which even technical people finding challenging! There is no need to cover this material in class unless participants really request it.

Discussion point 1.1.10 is to help non-technical people think creatively about energy technologies.

Next the concept of the energy ladder is introduced. Again this is a familiar concept to many people with an energy background. It is a concept not without its critics – primarily because it paints a too simplistic picture (households use a variety of energy sources for a particular end-use depending on circumstances) and it has a technical focus which says nothing about who decides which technology to use. However, it is a useful visual conceptualisation but perhaps it is a good idea to remind/inform participants of the shortcomings.

Discussion Point 1.1.11 is a useful starting point to get participants questioning why women are not always benefiting from modern energy sources for cooking. The discussion is to help participants to recognise the failures of energy planning to address women's issues in particular metabolic energy and biomass energy. Discussion point 1.1.12 adds another dimension to the reality of women's lives that energy could make a significant contribution to improving: drudgery. These two discussion points could be done in plenary or working groups.

Discussion point 1.1.13 leads on from 1.1.11 but focuses more on planning. This topic is returned to in Unit 1.2 (discussion point 1.2.2) where we see that the issue is broader than biomass energy. The trainer needs to decide if there is sufficient time to cover all points.

The last part of the unit brings together the two concepts of gender and energy and puts them in a poverty context. Exercise 1.1.5 can be a useful introduction and should be done on an individual basis. This section is important for all participants irrespective of background. The concept of energy poverty is introduced, along with its gender dimension. Understanding the linkages is important for designing sustainable and effective interventions.

A final but very important point to finish the unit is why although we talk about gender and energy the focus is mainly on women. This point needs explaining since many people find it puzzling, even contradictory.

UNIT 1.2

This is a relatively short unit in terms of material to be covered but there are a number of exercises which can take time to do but are important for participants to begin to apply the concepts they met in Unit 1.1.

The unit begins by briefly describing approaches to energy planning. Usually these are from the supply side which is one reason women/gender issues are missed. Taking a demand side approach – increasingly known as the energy services approach is considered a more comprehensive approach which will ensure that women/gender issues are addressed in the energy sector.

Discussion point 1.2.1 follows on from Unit 1.1 and can be used as a refresher on how energy technologies can reduce women's drudgery.

Exercise 1.2.1 has a case study which is a very typical energy planning situation. The questions are designed to show how it can be done better by taking gender into account.

The section on 'Why should gender be taken into account in energy projects' could be started by the trainer asking the participants this question, and allowing them to come up with answers, before going through the text on this. The section finishes with Exercise 1.2.2 which is the most important one to cover (if time is running short). It should make participants think hard about roles of men and women. If they do not think of it themselves, prompt the participants to think about who will gather the cotton stalks in the field and who will transport them to the factory? Very likely this will be women's work but the cost of this is not included in the economic calculations – a very typical oversight of energy planners!

The next section looks at why gender has not been considered in the past in energy planning. Discussion point 1.2.2 may take some time. It is suggested to handle it in plenary with the whole group. There may be differences of opinion on this question, allow time for these to be explored. Possible answers are (1) because women's fuels (biomass) are not 'visible' in statistics (2) because biomass fuels are often gathered free of charge and are therefore not considered to be important. (3) because it never occurred to energy planners that women have different energy needs from men,   and (4) deliberate discrimination against women.

Discussion point 1.2.3 links the theory from Unit 1.1 to practical energy applications. Cooking using electricity from micro-hydro is potentially an economic option but what are the barriers that prevent the transition up the energy ladder? The discussion should show that electricity is not a universal solution – despite the attention electricity receives. This discussion point can be a useful preparation for ideas introduced in Unit 1.4. On the other hand, if time is short it can be left out at this stage and introduced in Unit 1.4.

We now return to another issue met in Unit 1.1: Metabolic Energy. Case 1.2.3 on 'Gender contracts in Zimbabwe' is a little complicated but very interesting. It shows how much human or metabolic energy is invested in different tasks which are regularly carried out. It shows that fetching water uses an enormous amount of energy – more than fetching firewood even- and from this one could conclude that technology to provide more convenient sources of water would be an important way of conserving energy – human energy, and in particularly female human energy (it could also possibly have positive health benefits by reducing contamination at the collection point).   Discussion point 1.2.4 follows from this; some creative ideas might result! The section ends with Exercise 1.2.3 which could be used as an alternative to the discussion point if time is running short. This could be done as a group exercise.

The unit ends with a theme that will taken up again later: gender relations. Here we see that we   need

to understand not only gender roles but also gender relations if we want the technological interventions to be taken up.

Exercise 1.2.4 concerns a rather strange project; some of the activities don't seem to have much to do with energy, or indeed with what women wanted (eg the turkey farm). You could ask the participants why they think this element was introduced. Most likely it was because of complaints on the donor side that there was not enough 'gender content' in the project. You could use this to start a discussion on whether all projects should have special activities for women. The question of female professional staff (lack of) comes up strongly in this case too. You could start a discussion on why this is and what could be done to overcome it – the situation as regards females in the energy profession is very poor indeed in most countries.

UNIT 1.3

This is a relatively short unit, which introduces the idea of 'mainstreaming'. This course is mainly geared to mainstreaming gender, but it is important also to understand that there are times when a 'women-only' approach may be useful. The term "mainstreaming" is a familiar one to gender specialists and less likely to technical people from the energy sector. However, even people who use the term may not be entirely clear what it means or entails (it can be a goal in itself or an approach to achieve a particular end). Discussion point 1.3.6 at the very end of the unit is included to ensure that the concept is clearly understood and how it can be used effectively in energy project planning.

The unit also introduces the terms 'gender blind' etc. It is important that participants come to realise that 'gender blindness' does not mean *gender neutral* – because gender blindness generally means that projects are unintentionally biased in favour of *men*. This can be hard for people to acknowledge sometimes, but it is the truth: if women are not specifically identified and their opinions specifically sought, things are done in the men's way because men are almost always the spokespeople and decision makers. Discussion point 1.3.1 is for plenary discussion and can be used to assess whether participants understand the terms.

The two case studies of 'women-only' projects (cases 1.3.1 and 1.3.2) should be read by the participants (Allow 5 mins for each). These are rather unusual projects. You could start a discussion about why these projects are so unusual. Discussion point 1.3.3 asks participants what it would take to start such projects elsewhere (eg in areas where the participants are working).

The case studies of gender mainstreamed projects in Nepal (1.3.3 and 1.3.4) should also be read by the participants (5 mins each). Use discussion point 1.3.4 to round off the conclusions from these cases. Extend the discussion by asking the participants what their own experience is of giving women more voice in public meetings. Discussion point 1.3.5 is a useful lead into Unit 1.4, in which the participants will learn that in many projects, stakeholders have different gender objectives.

The unit ends with a discussion on taking mainstream further. This can be omitted if time is short. Up to now the manual focus mainly on women as the beneficiaries of energy projects as the end-users of an energy technology. However, mainstreaming is about transforming gender roles and relations including allow women a more active role in decision making and controlling assets. One aspect is the role of women as energy entrepreneurs and energy planners: should they? Why? Will it make a difference to other women's lives? Discussion point 1.3.7 uses the energy chain concept (met in Unit 1.1) to identify where women can be involved in the different parts of energy supply. This can be a lively debate where people are challenged about their own views about what women can and can't do. Discussion 1.3.8 looks at the exclusion of women from a sector which has a "male" face. Points to bring out include gender sensitive men can also make a difference in the energy sector and not all women are gender sensitive.

Exercise 1.3.1 concerns a project run by women for women. From this can come a discussion on the strengths and weaknesses of women's organisations. This may vary from country to country, so if you have participants from different countries, try to get them to elaborate on the situation as regards women's organisations in their own countries. Let the participants consider why women's organisations have been stronger in some places than in others. Is this 'cultural'? Or does it have to do with government policy as regards education and support to women?

Exercise 1.3.2 only works with a large class (25 or so). If you have a smaller group, skip it. Discussion point 1.3.6 can substitute for exercise 1.3.2. Exercise 1.3.3 should be done in small groups (3 to 4 people).

UNIT 1.4

This is a long unit, but a very crucial one as regards the development and deepening of people's understanding of gender in energy. The idea that there might be *different types* of gender goals is a very new one to many people – most people assume that the idea of using a 'gender' approach in planning is to 'help' women, but they do not really think through the question – help them do what? What are we trying to achieve by 'helping' women? Is this intervention really what women want? This unit forces the trainee to think much more clearly about exactly what she/he wants to achieve by using a gender approach, and to recognise that other people may have quite different ideas about   this – including the target group themselves!

This unit should be carried out even if the participants have a good background in gender and are already familiar with standard gender tools such as the Harvard Matrix etc, because Module 2 of the course builds strongly on the ideas that are developed here.

6 hours is probably the minimum time for this unit; in addition to the text there is a simulation exercise which is very instructive (which takes 2 hours) and if you can get hold of them, there are two (short) videos which illustrate aspects of the unit nicely.

A second gender analytical framework is introduced here: practical and productive needs and strategic interests. However, please note that in our experience in the energy sector, we have found it more useful with this framework to make a distinction between three needs/interests: practical, productive and strategic. This needs to be made clear, particularly where participants already have a working knowledge of gender analysis. Ask participants to identify some of these from their own experience – they could do this not only for energy but for other sectors too. You could use exercise 1.4.1 at this point if there is time – but plan carefully, because there is a lot of material still to come.

Case 1.4.1 (the Mali multifunctional platform) is about very unusual approach to mechanisation, which also addresses gender needs, and most participants will be fascinated by the approach adopted. Discussion point 1.4.1 is linked to the case. An excellent video of the Mali platform is available and well worth showing if you can get it (about 15 mins).

The underlying themes in Module 1, are that women's energy needs are more than cooking and that energy can help meet different gender objectives. Working through table 1.4.1 on Women's Needs and Issues emphasises these points. Make sure that participants really see the difference between practical, productive and strategic and let them add more examples to the table (easiest to do this in plenary).

The simulation exercise (1.4.1) involving Anakapalatranam village is an important one and should not be missed. It is also fun to do. The participants have to role play various actors – different social groups within the village, and the planners. This kind of exercise brings the issues out much better than simple discussions in class. Make sure that you pick some strong participants as the planners. It can be very illuminating (and a lot of fun) if 'men' in the village are played both by female participants and "women villagers" by male participants. Encourage the participants to make it 'real' by inventing names for themselves (and for the planners, for their organisation). Not everyone finds acting easy or fun, but encourage those that do – with luck, you will have at least one trainee with a sense of pantomime who can make the others laugh. The difficulty for the 'planners' is to find ways of finding out what the needs and goals of the village are, without using 'difficult' terms like 'practical needs' or 'empowerment'. The difficulty for the villagers is to express themselves. You should instruct eg the women of the lower caste group that they should not speak up at meetings, and if asked a question, they should lower their eyes or cover their faces with a cloth, especially if the questioner is a man. The more dramatically this is done, the better.

The next section introduces the idea of gender goals. Start by introducing just the first three – welfare, productivity, and empowerment – and show how these relate to the kinds of needs we have just identified - practical and productive needs, and strategic interests.   Ask the participants to talk

about projects they know or are involved in, and to say whether they are fundamentally aimed at welfare, productivity or empowerment. You could make a table on the blackboard with three columns and note down the names of these different projects. Discuss for each of the projects that are suggested, why it is to be classified as 'welfare' or 'productivity' or 'empowerment' to clarify the criteria. Let the participants read cases 1.4.2 and 1.4.3 (solar water disinfection and Ugandan solar dryers) and confirm that these really represent (a) a welfare and (b) a productivity approach, respectively. Allow debate on these, if participants have their doubts. Ask participants especially about energy project that 'empower' women (these are quite rare). You may also need to spend time discussing what we mean by *empowerment*. This is a term that is widely used but clearly understood particularly because it has different definitions and people who use the term do not always make their definition explicit.

Stress the fact that it is not so much the technology itself which may empower women, but more the way the project is planned, organised and managed that give women opportunities for empowerment.

The fourth type of gender goal is of another order: it is an instrumental goal, but it is one that in reality is quite common. Here the aim is not to improve the situation for women <u>per se,</u> but simply to increase the chances of project success by recognising that there are in fact two 'markets' – men and women – and that if one is trying 'sell a product' – that is, get a technology accepted by a given target group – it is better to look at the characteristics of both groups. This may be a strange idea to the participants at first (however, we fear that this is probably the goal that many male engineers in the energy sector feel most comfortable with). You could explain that this is a *gender aware,* but *gender neutral* approach. The film about tree planting in Thailand is a very good illustration of this (it takes about 25 mins).

The trainer can draw upon discussion points 1.4.3, 1.4.4 and 1.4.5 if there is time.

By this time the relationship between practical needs and welfare goals, productive needs and productivity goals, and strategic interests and empowerment goals, should be fairly clear. Table 1.4.2 on the relationship between project and gender goals rounds summarises the issue.

Exercise 1.4.3 can be used to round of this session if there is time.

The next table (1.4.3) on energy interventions to match different gender goals could be used for discussion: in particular, what other energy interventions could be identified to match each goal? (see discussion point 1.4.6).

These two tables are used again in Module 2.

Exercise 1.4.4 can be used to allow participants to try out their new analytical tool. The exercise involves a long case study and participants need time to read it (15 to 20 mins). If there is time pressure this exercise could be skipped.

The final section deals with the fact that gender goals are almost always very confused in project documents. Case 1.4.8 is hypothetical but it will be a situation very familiar to many participants. It could be an interesting closing debate: is empowerment a Northern donor and/or feminist driven issue which should be kept out of energy projects?

If there is time you could ask the participants to study table 1.4.4 in which show the Millennium Development Goals (MDGs) – goals that were set by the international community for worldwide achievement by 2015. There is no MDG specifically for energy (at least in early 2005 and at the time of writing there is discussion about updating the MDGs to include one related to energy at the interim review meeting in September 2005). Table 1.4.4 represents attempts first to add an energy dimension and then a gender perspective to the goals. Participants could be asked, in working groups, to formulate an MDG for energy that is gender aware. (If an MDG exists discuss whether or not it is gender award and what types of gender needs are met.) This discussion can be skipped if you are

short of time.

Exercise 1.4.5 can be used to round off the session (if there is time).

TRAINER'S GUIDE TO MODULE 2

UNIT 2.1

This unit is short and straightforward.

It is quite possible that some of the participants have come across methods such as the Harvard Matrix during their work or in other training courses. If this is the case, ask the participants to explain these methods briefly to the class.

Good points about the standard tools like Harvard Matrix are: they are useful for raising awareness about gender, they bring important facts out into the open (such as that men and women have different levels of access to many resources).

Then point out that these methods:

(a) do not start from an identification of gender goals which were introduced in Module 1 Unit 1.4 and are used in Units 2.3 and 2.4 and
(b) do not focus on energy at all

Use these arguments as reasons for the need for special energy tools which will be introduced in Unit 2.3.

If none of the participants have any experience of gender tools, it is better just to skip everything except the first overhead which explains what gender tools are, in general terms. Appendix 1 contains an overview of the most common gender tools.

There are no exercises for this unit.

UNIT 2.2

The first important concept introduced in this unit is the different between an energy technology project, which is one promoting certain types of energy technology (which could include forest management for woodfuel, biogas, rural electrification, improved stoves, micro-hydro, wind mills, improved charcoal kilns etc) and integrated development projects, which are typically multi-sectoral and deal with a lot of development problems at once, and in which energy may be one component. In this second case, the energy aspects have to fit into the whole picture and respond to general development needs as identified in other sectors.

Make a round of all the participants and let each one say which type of project they mostly work with (if at all). If there are doubts about a particular project, let the class debate it and decided how that project could be categorised.

The four stages of planning used in this module are common to the Project Cycle, Logical Framework and Sustainable Livelihoods Approach, but they are not always known by the names given here. Allow the participants time to think about their own planning process and see how this fits into the scheme sketched here.

If you have participants who have never worked on projects it would be good to divide the class into small groups and make sure that each 'non-project' trainee sits with participants who do have experience of project.

The most difficult part of this unit is the framework, and it is important that the participants become familiar with it and understand it, so allow plenty of time for this.

Use the discussion point 2.2.3 to help participants work through the framework. Exercise 2.2.1 is a good one – participants really have to understand the framework to explain it to someone else!

UNITS 2.3 and 2.4

Unit 2.3 describes a process for looking at gender questions in energy, applied to a case study from Sudan. The process is presented first simply as four stages making a planning framework, in which a series of steps formulated as questions have to be answered in sequence. The 'tools' (matrices etc) that are used to answer are not really explained in this unit – but they are presented one by one in the following unit (Unit 2. 4).

There is a lot of material in this unit, and it is very important that you present the whole case, to ensure a deeper understanding by the participants of the framework and the tools. You cannot present the case as a reading exercise, because it is too large to comprehend and understand all at once. This guide however provides some suggestions for breaking the unit down into more manageable parts. Additionally, topics for discussion are provided for these parts and the steps in the framework.

The best strategy is to work with both unit 2.3 and unit 2.4 at the same time. This means that the participants first look at how the steps were done in the case study (material from unit 2.3), then at how these steps are set out in unit 2.4.

The material is broken down into parts based on the difficulty of the different steps. A time schedule for the steps is also provided. This is for guidance only since the amount of time will depend on the knowledge and experience of the participants. We estimate that the time required to deliver Units 2.3 and 2.4 is probably about 8 hours, but it may be a good thing to aid learning to divide this over two days. There are lots of new ideas and concepts to be absorbed which can be mentally tiring. Those participants familiar with standard gender tools may require more convincing and there maybe more discussion with these participants after the units have been completed, comparing and contrasting experiences with the different tools.

If time is available, we strongly recommend experimenting with some of the participatory data gathering methods (from unit 2.5) in the field. These methods are fun and break up the day, as well as contributing to the understanding of the framework. Participants may need time to familiarize themselves with the methods. They will also need time to prepare for the fieldwork and to analyse and present their findings. Allow for travel time to the fieldwork site which the trainer needs to have checked out in advance (see Part 2 for advice on this). So fieldwork can take up to two days depending on the experience of the participants with participatory data gathering methods.

General each part should be treated as follows:
1. The participants / participants sit in small discussion groups and read the material relating to the selected piece from unit 2.3 and 2.4
2. Some time for a short explanatory discussion on the information in the case (in plenary)
3. Discussions in the small groups concerning the tools.

Part 1: Introduction [15min]
The introduction can be a short reading exercise. A short explanatory question round can be useful. No additional discussion is necessary.

Part 2: Steps A1-A3 [1 hour]
- Discussion A1:   Do you agree that it is a logical step to start a project planning process by determining the stakeholders of the project? Why (not)?
- Discussion A2:   Do you think that this subdivision is legitimate/useful? Which groups would you add or remove?
- NOTE Step A3   In Table A3, the highlighted words are related to the concept of gender goals from Module 1 Unit 1.4. These highlighted words occur throughout the text.
- Discussion A3:   o   The implementing agency ADS supports the empowerment of women.

Additionally they want to ensure the efficiency of the project. Do you think that in general implementing agencies support empowerment?

o UNDP favours the empowerment and increased productivity of women. In general, what will be the main concern of the sponsoring agency?

o Do you think that the women and men in the village explicitly determined their gender objectives as the wish to empower women? Do you think that they will be able to explicitly determine any of the gender objectives? Why (or why not). Do you think that sponsoring and implementing agencies are able to explicitly formulate their gender objectives? Why (or why not)? Would you address these groups in different ways?

Part 3: Steps A4-A5 [45 min]

- Discussion A4:
  o Did you ever work with project indicators? How did it work out? Did you come across any problems formulating measurable indicators? Do you agree that it is important to make use of indicators? Why (or why not)?

  o Do you think that all these indicators should be met? Or should the project focus on reaching one of the indicators? Why do you have this preference? Which gender objective in this case would be the most important to realise?

- Discussion A5: What cultural constraints and opportunities have you experienced as a project planner? Are these opportunities and hindrances important enough for you to take explicitly into account in a project planning process?

Part 4: Steps B1-B3 [1 hour]

- Discussion B1: The identified subgroups give different priorities to change the tasks they perform. Do you think that this *ranking order method*, which has been used in focus groups, is the most suitable method relevant in this case? Or would you use another technique? Why?

- NOTE Step B2 This step uses Moser's Triple Framework introduced in Module 1 Unit 1.1.

- Discussion B2:
  o Do you think that this comprehensive analysis of the current and future activities and energy use in the village is necessary? Why (not)?

  o Do you think that this table represents many villages in the development world? Are there any remarkable outcomes that you wouldn't have expected?

- Discussion B3: The project has formulated in a desk analysis some energy solutions for the tasks that men and women want to have relieved. Do you think that the identified energy solutions are all-inclusive? Has the project forgotten any energy solutions?

Part 5: Steps B4-B5 [2h00]

- Discussion B4:
  o Do you agree that it is important to study the access to and control over energy sources and technologies by men and women? Why would(or wouldn't) it be important to study the access to and control over such existing energy technologies in the village?

  o Is it equally important to study access and control for community and household energy technologies?

  o Do you recognise the division in access and control between men and women that appears from the analysis from your own experiences? What do you recognise?

  o In this integrated development project, the decision about which energy technologies to implement, is taken after this step. In your opinion, is this the right moment to choose? Would you have chosen earlier or later in the planning process?

- o Do you agree with the decision to implement a solar home PV system and the rural telecommunication system? Do you think that these energy technologies fit most of the previously identified gender objectives? Would you have chosen other technologies? Which and why?

- Discussion B5:   Not all villagers are enthusiastic about the selected energy interventions. Do you find it a legitimate decision to adopt the solar home PV system and the rural telecommunication phone?

  How would you deal with a village that refuses the energy interventions you have selected? Would you try to change their minds? Or would you select different energy technologies?

  Perform two 30 minute role-plays. Use the case study as starting point.
  1. Select three participants to play "project planners". Divide the rest of the group into two: women and men villagers.
  2. The planners will have to find out whether the <u>women</u> in the village support the chosen energy interventions.
  3. The planners need to find out how the <u>men</u> feel about the energy interventions.
  4. How could any critical comments by the men be addressed?

Part 5: Steps C1-C2 [1h00]
- Discussion C1:   o Do you find the expected benefits and disadvantages realistic for the solar home PV system? Are they complete? What alterations do you suggest?
  - o Do you find the expected benefits and disadvantages realistic for the rural telecommunication phone? Are they complete? What alterations do you suggest?
  - o Do you find it useful to involve the target group in identifying positive and negative impacts? Why (not)?
- Discussion C2:   o Do you find it worthwhile to perform this comprehensive analysis of the resources that are necessary to implement the energy technologies?
  - o Is there any information missing in these analyses? Which?
  - o Have you ever performed a similar analysis? How were your experiences?

Part 6: Steps C3-C6 [1h00]
- Discussion C3:   o The village discussion reports provide a rather positive picture. Have you ever experienced such an attitude towards the involvement of women in maintenance and repair activities? Are men, in your experience, willing to involve women? Why (not)? Are, in your experience, women as enthusiastic as in these scenarios?
  - o Do you think that the important role for women in maintenance and repair activities is realistic in this particular case given the outcomes of step B4? Why (not)?
- Discussion C4:   The women are not only active in maintenance and repair activities, but also in the management of the facilities. Would you find in this case the active role for women in management legitimate? Is it also realistic given the outcomes of step B4? Why (not)?
- Discussion C5:   o Have you ever experienced problems in your projects, because the implementing organisations were not gender sensitive? If yes, what kind of problems were they?
  - o Do you find it worthwhile to perform analyses of the gender awareness in implementing organisations? (why (not)? Have you ever done it before? What were your experiences?
- Discussion C6:   Have you ever been constrained in your project because of regional / national / international regulations? Is it a common activity for you in your planning

project process to determine relevant policies? Why (not)?

Part 7: Steps D1 – D2 [1h00]

- Discussion D1:   o   Do you find the formulated development indicators realistic for   this project? Why (not)?
- Discussion D2:   Do you think that the energy technologies will have the effects described? How realistically do the solutions match the gender goals of the stakeholders?

UNIT 2.4

This unit should be carried out concurrently with Unit 2.3 and the instruction are embedded in those for Unit 2.3

UNIT 2.5

These methods are fun to use and easy to understand.

There are several excellent videos which show how they can be applied, these are listed in the Reference section. There is even one video which shows how standard PRA methods can be 'genderized' – what it in fact comes down to is using the PRA methods in focus groups of men and women separately, which is what we recommend also.

If the videos cannot be obtained, do not despair.

First discuss the way to carry out focus groups.

Then introduce the priority ranking method and invent an exercise to demonstrate it. The exercise could be something from the energy field, but it could also be something quite different: such as: what shall we do this evening: go to the cinema/sit in the bar/watch TV/go to bed early/play football., or indeed any topics that will amuse the participants and which they can argue about in a friendly way.

Divide the class into smaller groups (8-10 people in each group), let one person be the 'facilitator' and another the 'note-taker' and let them practice the exercise. Do not provide the symbols, let them find their own from the room they are in or from the garden outside.

Then let them practice the pebble ranking system. Chose a subject about which there will really be some disagreement: be ready with a bucket full of suitable counters – could be small value coins or sugar lumps for example.

Discuss with the participants what they think about these methods and incorporate any suggestions.

We strongly recommend that you use the exercise 2 on interview technique that is included in appendix 2 of the Manual from the Commonwealth Secretariat publication: "Women and Natural Resource Management: A manual for the Africa Region". This involves looking at photographs of interviews and understanding the 'body language' involved.

The participants will be expected to use these techniques during the fieldwork exercise.

UNIT 2.6

Participants should be explained the purpose of the exercise, and urged to think critically about the things that they have learned during the course, and whether, and how, they may be able to apply these in the normal course of their regular work. Each participant should be asked to work through the following format, but should not be limited in their comments (this is not a form to be filled in, but a framework for developing ideas).

This exercise can be useful to the course organisers/sponsors for follow-up, either to assess the impact of the training or to provide backstopping in the implementations of the plan.

If time allows, participants could present their action plans. The group might already be able to offer advice and tips for overcoming inhibiting factors.

Presentation can be as a poster. Allow time for group members to circulate and read the other posters. They can pin/stick suggestions onto posters.

PART TWO

THE ORGANIZATION OF COURSES ON GENDER AND ENERGY

THE ORGANIZATION OF COURSES ON GENDER AND ENERGY

Introduction

This section is included for people who are not familiar with organising training courses since it is very easy to greatly underestimate the amount of work involved! The information presented is based on the experience at the University of Twente, in the Netherlands, in organizing short (3-9 weeks) energy training programmes over a period of more than 20 years both at the University and in-country training for third parties.

The organization of courses begins by investigating if there is a need for training. For whom will it be beneficial to have training on gender and energy? Which aspects? Which sectors will support the training of their staff? Is the need for training recognised by superiors? Will staff be granted permission to be absent from work for the course period? Who is going to support the training financially? Are employers prepared to pay, either fully or in part, to enable participation by their staff? The least they should do is continue to pay salaries during the course period!

Once a demand for training is identified, and potential groups of participants are identified, financing has to be sought: financing the announcement of the course, financing the preparation of a course programme, for the development of course materials, for organisational tasks, for running the programme, for reporting, for travel expenses, for trainers' fees, for excursions, for accommodation, for equipment, for overheads, for the participants expenses, for course materials, etc. This long list of financial aspects of a course programme, which is far from complete, indicates that it would be wise to follow a fixed plan for the organisation in order to avoid forgetting certain items in the process.

It is not practical or sensible to give all the different organizational tasks to one person. The design of the programme should be team work: the future Course Director will detail a proposal and discuss this with his lecturing staff and the Course Administrator. It is recommended that a start is made on organizing the course at an early stage (9 months in advance is suggested). It is also advisable to share the organization between a team of at least three people: the Course Director, the Course Administrator and the Course Secretary. A specialist on financial affairs and a documentalist, if available, will be very useful in the organisation of the programme.

Details of organisation, timetable, specific tasks for team members and some recommendations are presented below. The instructions are for an open course in which finance has to be organised and participants selected. A tailor-made course for a third party providing funding and participants would probably take less time, although TOR and contracts would been to be negotiated.

Scenario for a gender and energy training programme

The scenario starts with the assumption that
a. The need for training and the target group of participants has been identified.
b. Funding options have been analyzed and decided on (see also paper on 'Financing Courses on Gender & Energy Environment for Sustainable Development, Annex 2).
   Securing funds will take place during the whole period of preparation.
   Sponsors often take decisions on funding at the last moment!
c. The Course Director will not have the lead in the training and trainers from the host institution or from outside will be used to deliver the training course.

The scenario covers:
The Organization
   Content of and timetable for the announcement, development, the preparation, the execution, and the evaluation/reporting of a training programme
The Organizers

Who will organise the course and what are the specific tasks of each individual team member
Recommendations
Items not directly related to content but can make all the difference to participants enjoying the training. Participants who are happy learn better!

Organization

The procedures recommended for the organization of a course are presented in the form of a plan, including a time schedule and a list of tasks for the organising team.

The organisation of a training programme can be split up in five sections:
1. announcement of the course
2. course and curriculum development
3. preparation of the course
4. execution of the programme
5. evaluation and reporting

Each section is split up into different tasks; the time when to begin each task is indicated, before the execution of the programme begins. These times are only a guide. The amount of time required will be influenced by telecommunications and whether or not it is a national or international programme. The latter generally take longer than the former.

Example scenario for a training programme of 2 weeks:

Announcement of the course	**Starting point**
- printing brochure	8 months
- distribution of brochures	6-8 months
- advertising (advantage should be taken of journals which will announce the programme free of charge)	6 months

Course and curriculum development	
- designing the structure of the programme	9 months
- preparation of the course content	4 months
- preparation of course material	3 months
- reserving accommodation	12 months
- budgeting	9 months
- securing funds	9 months
- selection of trainers	3 months
dead line for application	3 months
- selection of participants	2-3 months
- arranging tickets & visa	2-3 months[1]
- organisation excursions	2-3 months
- arranging transport	3 months
- running of the programme	course duration
- evaluation	last day of the course
- reporting on the programme	as soon as possible after the closing, within 2 months, of the closing session
- assessing course evaluation	9 months (before next course)

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[1] It sometimes happens that a participant receives confirmation of a fellowship only two weeks before the course starts. It then depends on the willingness of the embassy to issue a visa in time. Also arranging a flight, at short notice, might be difficult.

The different aspects of the organisation are expanded in the detailed description which follows of the tasks of the organisers: the Course Director, The Course Administrator and the Course Secretary.

The Organizers

At least three people should be involved in the organizational tasks. However, this may not be possible in all circumstances. Trainers will have to prepare sessions for the course. Additional specialists on financial administration and documentation will improve the quality of the organisation. If you intend to run the course on a regular basis a Board of Advisors is particular useful with a new course. It is not only the technical advice that they can give to the organisers but also for potential applicants it can provide assurance about the quality of the training. Board members may be prepared to promote the programme. The Board can give annually advice on continuation of the programme and members can also provide valuable assistance when the time comes to change the programme.

The basic organising team consists of:

Course Director
> The course director is responsible for the total programme, for the content of the brochure issued in advance, and for the overall organisation
> The Course Director supervises the Course Administrator

Course Administrator
> The course administrator is in conjunction with the course director, responsible for: the securing of funds, the selection of participants, the design and the structure of the programme, the selection of, and invitation to, trainers, the admission of participants, selection of course and reading materials (in conjunction with the Documentalist) the overall administration, supervision of the host organisation, the organisation of excursions, evaluation and the reporting. The Course Administrator supervises the Course Secretary

Course Secretary
> The course secretary assists with the organization and the administration of training programmes. The course secretary is responsible for all local arrangements, correspondence with applicants, participants, embassies; for office and for financial administration (in conjunction with the Financial Administrator of the organisation).

Tasks for the individual organizers

If less than three people are involved then the tasks will have to be allocated differently.

The specific tasks for and responsibilities of the Course Director are:

Promotion of the course
> - by presentation at conferences and when contributing to other training programmes

Brochures
> - decision on final text
> - selection and invitation of advisors

Announcements
> - suggestions for new contacts

Acquisition
> - arranging fellowships/ contact with new sponsors

Course material
> - selection of final course material
> - liaising with trainers about material to be included in the manual

Trainers
> - preparation of TOR
> - identification and selection of trainers

- liaison over programme and content

Field work (if appropriate)
- liaise with trainers about selection of appropriate locations
- organisation (including pre-course visit to field worksite with trainers)
- preparation of supporting materials
- accompany trainers and group on field work

Execution of the course
- opening session, specific lectures, closing session

Certificates
presentation of certificates

Advice to/supervision of course administrator
- on securing funds
- on course programme
- on lecturers
- on course materials
- on excursions

Meetings
Chairing meetings of advisors and staff on the organisation of the course

Liaison
`   Appointing Board of Advisors
Liaison with Board Members.

The specific tasks for and responsibilities of the Course Administrator are:

Budgeting
- preparing budget estimates for the programme

Securing funds
- arranging fellowships
- support of applications for financial support from applicants

Brochures
- preparing text
- design of (new) cover
- checking proofs from printer / secretary

Course material
- design cover
- compiling manual
- selection of any additional course material
- preparation of course time table

Certificates
- design

Information on course programme and conditions for course participation to:
- (potential) donors
- trainers
- co-organisers
- advisors

Participants
- admission
- welcome on arrival
- introduction to the organising institute
- assist with queries during the programme
- introduction to library and documentation centre
  (in conjunction with the Documentalist)

Execution of the programme
- chairing opening and closing session of the course
- overall guidance
- reception and introduction trainers
- contributing to training (where appropriate)

- evaluation

Excursions
- selection of appropriate locations
- organisation
- lead the excursion group
- preparation of excursion materials

Documentation
- Assistance with preparing special documentation for course participants

Social programme
- selection of activities

Meetings
- arrange meetings for Board of Advisors and staff involved in course programme and its execution

Reporting
- preparation of evaluation report
- reporting to donors, Board of Advisors, Course Director and any co-operating institute(s)

The specific tasks for and responsibilities of Course Secretary are:

Brochures
- lay out
- design (new) cover
- liaison with printer
- checking print proofs

Announcements
- in national and international journals, to possible donors
- updating data bank of addresses
- mailing brochures
  placing on website

Correspondence
- response to request for information on course
- response to applicants

Course material
- arranging manual covers
- printing of covers
- collection of papers from authors
- copying of additional training material from trainers
- content manual indexing
- assembly of manuals and reading material
- preparation and printing of Course Time Table
- distribution course material to participants and trainers

Certificates
- checking participants personal data
- printing (& calligraphy)
- ensure signed by Course Director(s)

Information on course programme and conditions for course participation to:
- institutes and organisations
- embassies and funding agencies

Participants
- information on: course, fellowships, participants presentations, accommodation, travel, insurance
- receiving on arrival
- registration
- insurance: dealing with insurance company for health and personal liability insurance
- information on the locality of the course venue, opening hours of shops, banks, post office etc.

- information on churches, mosques and other places of religious worship
- arranging appointments with doctors or dentists, medical tests if required, etc.
- accommodation liaison
- payment of allowances
- guidance during the programme
- refreshments during the course
- registration with aliens police, or immigration services, if required
- air tickets -if applicable – booking and reconfirming
- daily transport -if applicable
- introduction to other facilities of the organising institute

Organising accommodation for
- participants, trainers
- lecture rooms
- receptions and social events

Equipment
availability of: overhead projector, (computer) projector, slide projector, videorecorder, video films, computers, software, internet connections

Field Trips
- transport
- collection and distribution of any supporting materials

Excursions
- transport
- collection and distribution of excursion materials
- assist the Course Administrator in leading excursions

Trainers
- information on course, venue and payment of fees, expenses

Documentation
- Preparing special documentation for course participants

Social programme
- welcome participants: organisation of communal lunch or drinks and snacks
- cultural evening(s)
- excursions during the weekends
- closing reception

Photographs
- arrange photograph of the group to be taken, and also
- photographs during excursions and closing ceremony
- sending photographs to participants, staff and hosts of excursions

Filing
- all course administration

Meetings
- sending out invitations and background material
- writing minutes
- distributing minutes

Reporting
- assists Course Administrator with reporting: statistical data on applications and admissions, participants

Recommendations

Recommendations for specific course items are on:

Course material
The course material should consist out of:
- Course Timetable, including daily programme, list of participants, background information on the course and its organisers, information on sponsors, information on venues
- Course manual

-     Reading material list

and if practical and required:
-     books on key topics
-     software
-     material for simulation exercises

Documentation
Participants should have access to course literature and to computers for the preparation of their contributions and reports.

Participants' presentations
A good way to involve participants and help them to learn from each other is to request each participant to present a paper on their own work and working experience connected with course topics. This should be sent out in advance. Experience is that participants value this element in the programme very highly.

Scheduling exercises, cases studies and site visits
Try to make the programme as varied as possible, mixing presentations, with exercises and group discussions. Mornings are when participants and staff are freshest, so introduce new or "difficult" concepts early in the day.
Half-day site visits should be scheduled as much as possible in the afternoons. In a longer course, it is also a good idea to break the programme by a site visit lasting a whole day. This helps participants to keep attentive and learning does not become boring.
Field work also helps to put concepts and new skills into context.

Simulations and games
These can be used as an ice-breaker at the beginning of the course, so that the participants and staff get to know each other quickly. They are also valuable as an educational tool during the programme.
Energisers, when participants are beginning to "wilt" are also fun ways to get people motivated again.

Social events and daily help
Solving (minor) problems, personal attention and having fun are as important for the overall satisfaction of the participants as the quality of the course itself. For the staff it is also more enjoyable if a good relationship is formed with the participants.
Cultural evenings, a week-end trip (if appropriate – remember visitors are interested to learn more about where they are staying and weekends away from home can be long!) and a communal meal all strengthen ties. Trainers should be invited to these, not just the organisational team.

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ANNEX 1

GUIDELINES TO ASSIST COURSE DIRECTOR

General

The Course Director is the person responsible for the smooth running of the Training Course, and for ensuring that participants are presented with a relevant and satisfying learning experience. In order to meet this goal the Course Director should:

- be involved at all stages in preparation, delivery and evaluation.
- be familiar with the content of the manual and the course sessions.
- take responsibility for all matters connected with course administration.

Before the course

Some procedures must be carried out 6 to 8 weeks before the course starts. They include the following:

- Discuss, if appropriate with funding or commissioning organisation: a) the selection of participants. and b) selection / identification of suitable trainers.
- Draw up, in consultation with the trainers, the course timetable.
- Send letter to participants to inform them about the course. The letter should state the course objectives and main topics to be covered. It should also advise participants what is expected of them both in terms of preparing for the course, for example, if they will be required to make a short presentation, and during the course, for example, preparing an action plan.
- Inform any Resource Persons, for example, contact person for a community where field work will be conducted, about: a) the content of the course and b) where the RP's input fits in to the course structure.
- Advise to the Resource Person on their inputs into the course.
- Send Resource Persons (including trainers):
  (1) copy of guidelines for trainers and all introductory pages
  (2) copy of the course time table
  and to the trainers only:
  (3) copy of manual, overheads and PowerPoint presentation
  (4) copy of Guidelines for Trainer (Annex 2)
  (5) copy of Trainer's Notes
- Liaise with trainers on selection of field work sites.
- Check facilities required (see Trainer's Notes and liaise with trainers), such as a classroom for around 25 participants (a room that has furniture is better for holding training in than one with fixed seating and desks), additional rooms for breaking into working groups, a place where participants can do homework or hold discussions, and the availability of overhead projector, manuals for all participants, writing material, flip charts, illustrative material, video, slides, blackboard and chalk, computers and internet access and recreational facilities.

During the course

Some procedures need to be followed on a daily basis during the running of the course. They include the following:

- Open course with an introductory overview of the course.
- Introduce the participants' Action Plan.
- As course starts ask participants to complete questionnaire on what they expect from the course. During and after the course, ask them to complete questionnaires concerned with course content, methods of delivery and relevance to their work situation. Also discuss these matters with RP.
- Check facilities required on a regular basis.
- Attend (at least 60% of) class sessions, especially RP's to monitor quality.
- Attend field visits.
- Facilitate final discussion and course review with participants.

After the course

After the course, an end of course evaluation report needs to be written. This is part of the process of internal evaluation of the course, and is also necessary for any sponsors of the training programme.

ANNEX 2

GUIDELINES FOR TRAINERS

You have been selected to be a trainer on this course because you have special expertise in a field of gender and/or energy and first-hand knowledge of the country/region. These guidelines are intended to help you prepare for the training course. The guidelines give a brief description of the structure of the manual which is the basis of the training programme, how to prepare for the course and some suggestions on how to approach the delivery of the training.

In designing the training programme, it is envisaged that there are two main trainers; one of whom should have a good gender knowledge and the other a background in energy. Other resource persons may be involved to give specific sessions. You need to liaise prior to the course with your co-trainer, the Course Director and, where appropriate, other resource persons. Allow plenty of time for discussion particularly if you have not worked with your co-trainer and/or contracting organisation before.

The Manual

The manual is divided into a number of Modules. The first deals with gender concepts and how these can be applied in the context of energy. The second presents a procedure and set of tools for examining the gender issues for a given project situation.

Each module is made up of a number of units, dealing with different topics. The time needed for each unit is indicated: it varies between two hours and one whole day. The first two modules, if done one after the other, will take about 8 days, on the basis of 7 to 8 hours per day. Depending on time available and the basic knowledge of the participants, the trainer should select those units which are most appropriate.

In the first Module, each unit consists first of a section of text, which includes some short case studies and some discussion points. Ideally this text should be copied for each of the participants. The idea is that the trainer will also present the material orally in classroom sessions, encouraging participants to engage in discussion about the concepts given, and the case studies, both in a spontaneous manner as well as on the discussion points that are provided. There are also exercises which may help to deepen the participants understanding of the issues at hand.

For each unit there is a short trainer's guide which gives some suggestions about how to treat the material for that unit and a set of exercises, each on a separate page. The trainer should choose which exercises she/he wants to use (depending partly on the time available) and copy the instructions for these exercises for the participants. Each unit is also provided with a set of sheets for making overheads and as a PowerPoint Presentation, which may be of use to the trainer in making the presentations to the class. The discussion points in the text are also provided in large format, and may be used as overheads/PowerPoint Presentation. The trainer is of course free to prepare their own presentation. There are also some suggestions for follow up activities.

The second Module consists of five units, of which the first two follow the same patterns as those in module 1. Units 2.3, 2.4 and 2.5 however are a little different. Unit 2.3 is a complete case study, or worked example, showing the methodology and how to use the gender tools in a real energy project plan (the case study is for a village in Sudan). Unit 2.4 presents all the tools one by one. Unit 2.5 describes some data gathering methods. These units are not provided with exercises and discussion points, and need to be tackled in small group discussions rather than in plenary. These three modules may best be presented in parallel rather than in sequence. Trainers' notes explain how to do this.

At the end of each Module there is a reference list which gives the full bibliographic details of sources that have been used in the preparation of the manual, and also suggestions concerning how to get hold of useful materials such as audiovisual aids which could be ordered and used in the course.

Preparation

You have been supplied with a standard training manual. You may need to adapt the material to meet the objectives of the training course you have been asked to give. We suggest that you.

- Read through the manual.
- Read through the Trainer's Notes. Adapt them to your situation (if necessary).
- Read through and select exercises, case studies and/or role play.
- Discuss the programme schedule with the Course Director and your co-trainer and agree who will cover which sessions.
- Prepare supplementary overhead transparencies or a PowerPoint Presentation (Course Director should supply a set of main points, discussion points and tables) and other teaching materials.
- Communicate any special requests to the Course Director e.g. use of video.
- Discuss with the Course Director any requirements for field work.

Participants should have a complete manual provided by the course director at the beginning of the course. Therefore, participants are able to prepare topics by reading and studying the material. Participants also have an overview of the complete course and the relationship between the modules and units. Therefore, all participants can be expected to have some prior knowledge of the programme.

Training tips

The training course is based on adult learning methods and on active participation by the participants. This is essential in group discussions, case studies and exercises. Discussion points are included throughout the text which can be used to promote this kind of interactive participation. They are available as overheads or in the PowerPoint presentation.

Breaking the Ice

Discuss with the Course Director who is responsible for introducing staff and participants. It is useful to get participants to write on cards what their expectations of the training are – these can be content related or non-content (eg networking or learning more about the country where the course is held or have fun!). These cards should be grouped together in topics, and stuck on a sheet on the wall. Refer back to it during and at the course of the programme to check whose expectations have been met.

Introduction

Introduce a topic clearly. Tell participants what the topic is about and explain the way the topic will be presented to them (for example, presentation by the trainer, group discussion, individual assignment).

Check the participants' prior knowledge, experiences, and interests. A brief discussion at the beginning of a topic could give this information. It is also very useful to have a brief discussion at the end of a topic to find out what participants thought of it and how they think the topic relates to their situation.

Feedback

Feedback is important at the end of each topic, and just after you have explained an exercise, a role play, homework, or something else. Make sure that you as a trainer give participants the opportunity to give brief comments or to ask questions. Answer their questions as clearly and fully as possible. If participants respond negatively to, for example, the presentation or the exercises, do not get hostile, but try to solve their negative feelings.

- Make sure that after each topic you check if the participants understood what the topic was all about.
- Check if participants know what the relevance of the topic is in relation to the other topics in the course.
- Discuss the relevance of the topic for the participants' work situation.
- Make sure that all participants get the *chance* to say how they feel about the topic, its content as well as the way it was presented (Note: they do not need to respond if they do not wish to).

Learning Objectives

The cover page of each Module and unit lists learning objectives. The objectives preferably employ 'action' or 'doing' verbs. Examples are: to classify, to apply, to identify, to adapt. A bad example of an objective, for example, is: to know. This is more passive, it is not an action in the sense of carrying out a task. Remember we are expecting participants to participate not to sit passively absorbing knowledge. The participants in general will be people with a number of years of experience which they can share with each other and learn from each other.

The aim of the training programme is to enable participants to understand the concepts of gender and energy (Module 1) as well as to acquire gender tools for use in energy project planning (Module 2) that they can use and apply in the workplace.

Participants' Involvement

What role should participants play during the course? And what is the role they have to play during a specific module or topic? You have to ensure that it is clear what their inputs will be. To ensure the participation of everybody involved it is necessary that all are well prepared (for example, by reading the papers in the manual, preparing exercises, or studying the material).

The participants should be encouraged to perform pre-course preparation such as resource reviews, data collection, and problem identification. Use should be made as much as possible of participants' work experience. You should inform the Course Director as early as possible if you require any pre-course preparation so that she can inform participants in plenty of time.

The involvement of participants is essential, not only because sharing their own work experience is an important part of network building, but also because adult learners learn more efficiently and effectively when they are actively involved and when they can link the new material to their own situation and experiences (see for example, Merriam & Caffarella, 1991; and Knowles, 1988). Exercises, discussion points, case studies and role play are included to help participants incorporate new knowledge and skills, and to make learning an enjoyable experience. You are welcome to provide your own material.

Participants can be asked to give a summary of the previous days training session. This should be first thing in the morning and should take no more than 30 minutes. One person should be responsible for the morning and one for the afternoon sessions – then it is not too onerous a task and the participant does actually participate in the sessions and is not too busy taking notes for their own presentation. Encourage them not to be too verbatim but more to give a general impression about what has been learnt.

Field Visits

These are an important activity since they give participants a real experience of things they have learned or discussed in the classroom. In particular Module 2 is much easier to understand once the tools have been practiced in the field. The following actions need to be taken when planning for any field work:

* Discuss possible field visit sites with Course Director during the planning period before the course begins.
* Agree with the Course Director about the division of responsibilities.
* Ensure that the field visits are relevant to the content of the Training Course.
* Inform local authorities if necessary.
* Visit the organizations/settlements personally in advance of the visits to discuss all arrangements fully.
* Plan a timetable for each visit.
* Inform participants of the activities associated with the field visits. Participants could be asked to prepare a questionnaire for the field visit (particularly relevant for Module 2).
* Check that transport to and from the field visit sites has been planned well in advance of the proposed date of the visit.
* Make sure that arrangements for participants' refreshments and possibilities to visit the toilet have been done.

- Allow time (as soon as possible after the visit) for follow up sessions.

Evaluation

It is the Course Director's responsibility to give out questionnaires to the participants about the quality of the course organisation and training before, during and at the end of the course (frequency will depend on the course management). These questionnaires are concerned with course content, methods of delivery and its relevance to participants' work situation. We are sure that the Course Director would also appreciate feedback from you as well.

References

Knowles, M. (1988). <u>The Adult Learner: a Neglected Species</u>. Houston: Gulf Publishing Company.

Merriam, S.B. & Caffarella, R.S. (1991). <u>Learning in Adulthood: a Comprehensive Guide</u> . San Francisco: Jossey-Bass Publishers.

ANNEX 3

FINANCING COURSES ON GENDER AND ENERGY

Introduction

First of all a warning: unless you are asked to organise a course by a donor who will meet all costs, obtaining financial support could be difficult, tiresome and time consuming.
Do not spend time and money on announcements and details of the programme before it is clear how the organisation and running of the programme will be paid for.

The best way to get a course financed is to fit it into an existing programme. In most development projects a training component is included. A course organiser should try to identify those programmes. A project proposal for funding a new programme, should be submitted to a potential donor in the format prescribed by the donor organisation. It will be wise to check beforehand, if a donor will in principle be interested in funding the programme.

Financial support will always be based on a cost estimate.
For a *new course* the time spent developing the programme and writing up and editing the course material should also be budgeted for.
For a *modified course* (e.g. a repeat course in a different location or for a different target group), time should be included for modifying course materials to meet specific local conditions; i.e. updating data and gathering material for local/regional case studies.
A *repeat course* under similar circumstances does not require time for curriculum development, although often notes and background material will be updated.

Budgeting

In order to make an estimate of the costs for the organisation of (new) training courses, the budget elements can be divided into:
(0. arranging the funds)
1.   announcement of course
2.   general and curriculum development
3.   preparation of course
4.   running of course
5.   evaluation and reporting

N.B.   Time spent arranging funds can never be included as a cost element to a donor, but   should be included in one's own estimate of the total time involved.

The organisation of training programmes requires team work. The costs of a course are the salary costs for this team, the fees for guest lecturers, costs of materials, site visits, costs for participants, for accommodation, overhead, and social events. A Course Director or coordinator should be appointed to take the overall responsibility. The lecturers in the programme will assist in designing the programme. In order to ensure smooth execution of the course, the Course Administrator and the Course Secretary should be present during the whole period of the course. The Documentalist collects interesting reading material for the participants and the Financial Administrator prepares budgets, pays allowances and prepares a financial report, which will be required by any donor.

In the scheme set out below, the personnel costs are expressed in terms of days needed for announcement, course and curriculum development, preparation, execution and evaluation.
In order to estimate the real personnel costs one has to
• determine fees for trainers
• request the Financial Department of one's own institute to calculate the daily salaries of individual organisers and trainers involved with course activities. These daily salaries depend on the rules   set

by each individual institute for calculating daily salary costs and on the gross salaries of the individuals involved and may include an overhead for telephone costs etc.

The time needed for a programme depends on several things, such as the status of the programme (new, modified or repeat), local circumstances, financial circumstances (course at the request of a donor or 'free market' course), length of the programme, the experience of the organisers and the expertise of the staff on course topics.

The following estimates are suggested as a guideline.

Personnel Requirements

The figures are provided for
1. A complete new two-week (10 days) programme, including curriculum development and programme planning, by course director, trainers and course administrator
2. Modifying an existing two-week programme to local circumstances
3. A repeat course, organised at the same place

number of days required by	for an NEW course	for a MODIFIED course	for a REPEAT course
Course Director	21	17	14
Course Administrator	49	46	40
Financial Administrator	6	6	6
Trainers	17	17	17
Course Secretary	49	49	46
Documentalist	4	4	4

It is assumed that there are two trainers. The Course Director and other resource persons can also contribute to the training. If a Documentalist and a Financial Administrator are not available, their tasks should be taken over by the Course Administrator and the Course Secretary.

Material Costs

Material costs depend heavily on local conditions. These costs include:
Announcement
- printing of brochure
- mailing and advertisements
- website design

Curriculum development
- development of a new curriculum requires purchase of new course materials, such as books, publications, video's, videos, computer programs.

Preparation for course
- correspondence by mail, fax, and e-mail
- travel costs (preparation site visits)
- copying manuals
- printing of covers for manuals
- certificates.

R*unning of the course*
- accommodation for course and trainers
- hiring equipment
- mailing, fax, telephone and internet connection
- trainers: travel, fees, Daily Subsistence Allowance
- site visits: bus + driver, gifts for hosts of site visits
- refreshments: coffee, tea, cold drinks, snacks during programme

- social events
- reception at closing ceremony
- a group photograph of the participants and staff; and other photographs during course (site visits, closing)

Evaluation and reporting
- copying
- mailing

Contingency
- 5 % is suggested

Participants related costs

Participants related costs differ depending on the venue of the course and the origin of the participants. The budget estimate can be split up in costs for:
- travel, from home country to course venue
- daily transport (if applicable)
- accommodation and pocket money
- medical and other insurance

Financing a gender and energy training course

There are several ways of financing training programmes:
1. To offer the course as a turn key project to a donor.
In this case all costs: development, announcement, preparation, running the course and evaluation as well as travel costs, accommodation, Daily Subsistence Allowance for trainers and participants (and for staff, if the course is not organised at their own institute), should be included in the budget.
2. Separation of development and execution of a programme.
   For a new programme a start up subsidy for its development can be sought. Then, in the course description and announcement, a fee is set for each participant. This fee should be estimated such, that with a given number of participants (e.g. 15) the remaining costs for the announcement, curriculum development, preparation, execution, evaluation and reporting are covered.

In the announcement, details of the estimated living costs should be given. Travel expenses will be different for each participant.

Fellowships to enable participation must be arranged by the participants themselves, with employers, national or international donors.
However the course organisation can assist in the following ways:
- promote the programme with potential donors
- make arrangements with donors, for example asking them to make a specified number of fellowships available
- forward, on request, the names and addresses of potential donors of fellowships to applicants; inform them of the conditions and how to apply for funding.

Where the costs are to be covered by income from fees, it is necessary to apply to one's own institute for a 'fall back' budget, in case the fees income is disappointing.
One should also estimate the minimum number of paying participants, required to cover the costs of the organisation.

Summary

Obtaining finance is time consuming due to the administrative regulations of donors.
It is advisable to start seeking funds as soon as a course structure is developed.
Turn key courses have often to fit into an existing programme for which the project proposals have   to

be submitted before a deadline, and structured to meet the rules of the donor. Conditions can differ from year to year! An incorrectly submitted proposal will result in failure to obtain funding; therefore a little time invested in getting a proposal right can repeat good rewards.

If one is relying on fellowships obtained by individual participants then it is not possible to know the number of participants (and hence income) in advance. Such arrangements are only possible if the organisers have a reserve fund to cover the costs in the case when the break-even number of participants is not obtained.

ANNEX 4

Specification number of days required for organisation of a two week course

Course Director		new	modified	repeat
1. announcement	text preparation	1	1	0
2. curriculum development	programme + adapting material	5	3	1
3. preparation course	fund seeking for support of course and/or participants	5	5	5
	internal meetings	3	2	1
	supervision course administrator	5	5	5
4. running course	opening and closing programme	1	1	1
5. evaluation and reporting	assessing evaluation reports of course coordinator/administrator and participants	1	1	1
Total number of days for Course Director[2]		***21***	***17***	***14***

Course Administrator		new	modified	repeat
1. announcement	design	2	2	0
2. curriculum development	programme + notes excursions + course materials	3	1	0
3. preparation course	- fund seeking for course and participants	10	10	10
	- internal meetings	3	2	1
	- selecting participants	1	1	1
	- inviting trainers	3	3	3
	- preparation for site visits	4	4	3
	- certificates	1	1	1
	- guidance to course secretary	10	10	10
5. running of course	full time	10	10	10
6. evaluation and reporting	to course director, organisers and donors	2	2	1
Total number of days for Course Administrator		***49***	***46***	***40***

Financial Administrator		new	modified	repeat
3. preparation course	preparing estimate of budget for course and participants	2	2	1
4. running of course	payment of allowances to participants	2	2	2
	payment of trainers	1	1	1
5. evaluation and reporting	financial report	1	1	1
Total number of days for Financial Administrator		***6***	***6***	***6***

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[2] It may be necessary to add days for contributing to the training.

Specification number of days required for organisation of a two week course by:

Trainers

(other then Course Director)		**new**	**modified**	**repeat**	
2. curriculum development	programme	1	1	0	
3. preparation course	- correspondence	3	3	2	
	- preparing material	3	3	2	
5. running of course	training	10	10	10	
Total number of days for trainers		***17***	***17***	***17***	

Course Secretary

1. announcement	printing, gathering addresses, preparing for distribution, posting on web site	3	3	3	
2. curriculum development	purchase of special materials and equipment	2	2	1	
3. preparation course	correspondence with applicants	10	10	10	
	correspondence with participants, embassies, sponsors, authorities	10	10	10	
	internal meetings	2	2		1
	preparation of course materials and certificates	3	3	3	
	arranging accommodation, transport, equipment, social events	3	3	3	
4. running of course	full time	10	10	10	
5. evaluation and reporting	collecting data for report, distribution	2	2	1	
6. miscellaneous		4	4		4
Total number of days for Course Secretary		***49***	***49***	***46***	

Documentalist

1. announcement	checking on announcements in journals	0.5	0.5	0.5	
2. curriculum development	purchasing new books on course topics	0.5	0.5	0.5	
3. preparation course	selection of books on course topics available at the University	0.5	0.5	0.5	
4. running of the course assistance to participants		2.5	2.5	2.5	
Total number of days for documentalist		4	4		4