Designing A Survey Instrument
A Participatory Approach

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Objective of Presentation

- Introduction, Background, and Objectives…
- Why Participatory Approaches?
- Planning Stages…
- Developing the Survey Instrument…
- Risks and Challenges…
- So What Happened?
Janasree – A Grassroots Organization

- An NGO with 65,000+ registered Self-Help Groups (SHGs) of men and women in all of Kerala…

- Broad Objectives - Sustainable and Eco-Friendly Development
  - Each SHG sets objectives within the broad agency mandate
  - Common activities – group savings and loans to members

- Janasree links SHGs with the Private and Public Sectors
Gender Equality in Kerala

- **Social**
  - High Levels of Human Development but Deteriorating Social Development

- **Economic**
  - Differential Access to Economic Resources and Opportunities

- **Political**
  - Weak Voice and Participation

- **Government and Dialogue in a Women and Development Approach**
Results of Janasree Activities

- Anecdotal Information Available
- Need for Assessing Results for Better Programs and Resource Allocation
- Celebrate the Positive Progress
- Enhance Accountability for the Self-Help Groups
- Little Knowledge of the Gender-related Impact
Objectives

- Design and Pilot A Gender-Aware Monitoring System at the Grassroots Level
- Formally Introduce a “Gender Equality” Approach
- Influence Policy Makers in Kerala to Shift Towards Gender Equality and Gender Mainstreaming
Why a Participatory Approach?

- **Improved Development Effectiveness**
  - Learning at the Grassroots-level Leading to Better Development Effectiveness
  - Increased Accountability at the SHG Levels
  - Strengthened Capacity

- **Comparative Advantages**
  - Effective Grassroots Structures for Participatory Action

- **Commitment from Top Management to a Participatory Process**

- **Availability of Human Resource**
Why A Pilot?

- Validity and Credibility of Method for Stakeholders
- Relevance of Information Being Generated
- Sensitivity of Data being collected (picking up data variations sufficiently and be adapted)
- Cost-effectiveness:
  - Is the information being produced worth the cost?
  - What are the tradeoffs?
- Timely: In a Manner Helpful for Management
- Is the Approach Achieving the Desired Objectives?
Plan, Plan, and Plan

Enhancing Learning

- Evidence Based
- Adapting Knowledge
- Applying Learning
- Generating New Learning

Participatory Process (Process)

- Organizing the Workshop
- Selection of Participants
- Selection of Facilitators/Trainers
- Selection of Partners
Process of Piloting .... (Phase 1)

- Anecdotal Information
- 2-day Planning Workshops
- 5-day Workshop to Train Surveyors
- Development of Pilot Draft Survey Instrument
- Participants Test Instruments with a larger group
- Workshops to Discuss Feedback
  - Sangham Members
  - Policy Workers
- Pre-Pilot Monitoring System with Baseline established
Which Results to Monitor…

Gender

Agency’s Mandate

Theory of Change

What is gender Equality?

Results Framework

Inputs to Outcomes
Turning Outcomes to Indicators

Iterative & Interactive

- Group Identifies a Development Issue and an Associated Intervention
  - Determines how the intervention will achieve results by converting a series of inputs into a defined set of outputs that are expected to achieve a desired development result or outcome,
  - Discusses inputs, outputs, and outcomes discussed (Gender Implications)

- Identifies indicators – 2 for each level (input, output, and outcome)
Understanding Methodologies

- Strengthened Capacity for Conducting Focus Group Discussions
  - Simulations on 3 different subjects (Road Safety, Gender Violence, Alcoholism)
  - Field Testing During Workshop
  - Testing with Larger Set of Groups
  - Discussion of Experience and Feedback
Developing the Instrument

Based on desired results, a draft survey instrument was prepared.

| Background Information | Progress in Views on Gender Equality | Economic Progress (Income, Savings, and Borrowing) | Social Development (Alcohol, Gender violence, Dowry, Training and Skills Acquisition) |
## Developing Data Collection Instrument

### Instrument
- Clarity and Simplicity
- Identifying Relevant Dimensions and Indicators
- Formulating the Questions

### Process
- Frequency of Collection
- Clear Responsibility
- Costs of Collection
- Quality Control
Moving Forward to Full State-Wide Pilot

- Pilot (Phase I) in 25 groups in TVM district
  - Data entry is currently on going for establishment of baseline

- Is coding answers too difficult for such grassroots situations? Too many questions? A little more risk taking vs. ownership?

- Two more workshops before expanding to 750 groups each
  - 28 of those previously trained appointed as “Social Monitors” – capacity will be strengthened and will monitor Phase II
  - Establish baseline covering 750 groups

- A Continuous Process of Capacity Building
Participation is Tedious

- Participatory Process
  - Takes Time
- Convincing Second-Level Management
- Provide Space to Express Uncomfortable Views
- Relevant Examples

- Reluctance
  - Is this the tax agency or a foreign agency with vested interests?
- Selection of SHGs
- Achieving Gender Balance
- Ethical Dilemma
Risks and Challenges

- Stiff Resistance to Change
- Critical Need for Ownership
- Keeping the Instruments Simple…
- Integrity of Pilot/ Data Collection and Entry
- Trade Offs between Rigor and Participation
- Appropriate Partners…
Monitoring Efforts

- Pre-tests and after tests
- Evaluation One Form
- Pre-determined Indicators
Results?

- Strengthened Capacity
- Some Data for Management on Groups
- A Gender Action Plan – focus on alcoholism and gender violence
- Increased and Improved Partnerships
- Shifting to a Gender Equality Approach in Policy
- Changing Mindsets (!)
Who are Janasree Leaders?

- Chairman: 102 Female, 33 Male
- Secretary: 96 Female, 39 Male
- Treasurer: 99 Female, 36 Male
Is Alcohol A Problem in Your Household? (1841 Respondents)

- No Problem: 52%
- Low Problem: 25%
- Modest to High Problem: 23%

Yet Very Few Go For Counseling!
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