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participatory learning and action

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Immersions: learning about poverty face-to-face



December 2007

participatory learning and action

Participatory Learning and Action, (formerly *PLA Notes* and *RRA Notes*), is published three times a year in April, August, and December. Established in 1987, *Participatory Learning and Action* enables practitioners of participatory methodologies from around the world to share their field experiences, conceptual reflections, and methodological innovations. The series is informal and seeks to publish frank accounts, address issues of practical and immediate value, encourage innovation, and act as a 'voice from the field'.

We are grateful to the Swedish International Development Cooperation Agency (Sida) and the UK Department for International Development (DFID) for their continued financial support of *Participatory Learning and Action*. The views expressed in this publication do not necessarily reflect the views of the funding organisations or the employers of the authors.

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Cover illustration: Regina Faul-Doyle
Design and layout: Smith+Bell

Printed by: Russell Press, Nottingham, UK

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Participatory development

Participatory Learning and Action (PLA) is an umbrella term for a wide range of similar approaches and methodologies, including Participatory Rural Appraisal (PRA), Rapid Rural Appraisal (RRA), Participatory Learning Methods (PALM), Participatory Action Research (PAR), Farming Systems Research (FSR), Méthode Active de Recherche et de Planification Participative (MARPP), and many others. The common theme to all these approaches is the full **participation** of people in the processes of **learning** about their needs and opportunities, and in the **action** required to address them.

The methods used range from visualisation, to interviewing and group work. The common theme is the promotion of interactive learning, shared knowledge, and flexible, yet structured analysis. These methods have proven valuable for understanding local perceptions of the functional value of resources, processes of agricultural intervention, and social and institutional relations.

In recent years, there has been a number of shifts in the scope and focus of participation:

- emphasis on sub-national, national and international decision-making, not just local decision-making;
- move from projects to policy processes and institutionalisation;
- greater recognition of issues of difference and power; and,
- emphasis on assessing the quality and understanding the impact of participation, rather than simply promoting participation.

Recent issues of *Participatory Learning and Action* have reflected, and will continue to reflect, these developments and shifts. We particularly recognise the importance of analysing and overcoming power differentials which work to exclude the already poor and marginalised.

participatory learning and action

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Photo: Tom Sharman



Joining in with the traditional dance routines during an ActionAid immersion in Khosolo, Malawi.

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Welcome to the 57th issue of *Participatory Learning and Action*. The theme for this special issue centres on experiences of learning about poverty face-to-face, often referred to as immersions. Immersions are opportunities for development professionals to spend a period of time living with and learning from a poor family.

You will see that there are no 'general interest' articles in this issue. This is because we felt that the theme articles would be relevant and of interest to all our readers, whatever field they work in. There are also no 'tips for trainers' in this issue, but we hope that you will find many practical pointers in the articles and extracts that follow.

About the guest editors

The guest editors for this special issue are **Izzy Birch** and **Raffaella Catani**.

Izzy worked with Oxfam's Africa programme for many years, and recently helped ActionAid develop a resource pack on immersions. She is currently working with SOS Sahel UK and Fahamu, a pan-African NGO working for social justice.

Raffaella is working with Praxis India to promote and network around immersions at both national and international level. She has over seven years of field experience in the development sector, mainly in social and community-based programmes in Africa. Her initiation into participatory approaches started with REFLECT, a participatory methodology aiming to empower communities through literacy.

Izzy and Raffaella have been supported by **Robert Chambers**, Institute of Development Studies, UK. Robert has written about and practised participatory approaches

extensively since the early 1980s, and is interested in the potential of immersions to allow the voices of the poor and powerless to be heard, and to bring about personal and professional change in those working with the poor.

About the special issue

This special issue is a timely reflection of an emerging trend in development practice. It draws together the richness of immersion experience to:

- reflect diverse experiences of immersions;
- identify the challenges and opportunities presented by immersions;
- begin to explore their impacts; and
- inspire people to have immersions, and help make them a regular practice for development professionals.

As is clear from the issue, many different models of immersion are being developed. Some are more structured, often based around a specific theme; others are more experiential and open-ended. But their common purpose is to bring immersion participants face-to-face with ordinary people, giving these participants the chance to test old assumptions, develop new perspectives, and strengthen their commitment to the challenge of poverty eradication.

Immersion approaches have been challenged on a number of grounds. Some favour other ways of giving the poor a voice and question immersions as the best means of influencing policy to take account of the poor and their needs and priorities. Some have doubts about the degree to which individual participants can really influence their employers' priorities and ways of working on return, given

underlying organisational biases and power dynamics. But a critical mass of interest is now gathering around the idea of immersions among major donors and civil society groups. The impact of immersions is only now being tested, and this issue explores both their limitations and their potential.

The structure of this special issue

The issue begins with an overview by **Robert Chambers**. Robert describes the many forms immersions can take, and the way in which they have slowly spread and been adopted by different organisations over the past few decades. He looks at the benefits of immersions – for individuals, organisations, and in promoting pro-poor development programmes and policies – and examines the reasons why there is resistance to the idea and practice of immersions. In his closing section, he makes a powerful case for the widespread use of immersions by development professionals.

After the overview, a short article by **Ravi Kanbur** describes his immersion in a village in Gujarat in 1999 organised by SEWA, a membership organisation of nearly one million women who work in India's informal economy. The Exposure and Dialogue Programme in which Ravi participated was designed as part of the process for developing the World Bank's 2000/01 *World Development Report: Attacking Poverty*, which he was leading. This description of his experience in Mohadi village has become a seminal account in the history of immersions. Ravi himself said that it was 'one of the most educational and moving experiences of my life.'

Following on from these introductory pieces, there is a range of full-length articles and short extracts by key proponents and participants in immersions. This part of the issue is divided into four sections.

- **Section 1** sets the scene, telling the story of how immersions have evolved within the four institutions most actively involved in this area of work to date: the Exposure and Dialogue Programme Association (EDP), SEWA, the World Bank, and ActionAid.
- Having examined the wider historical context in Section 1, we look in **Section 2** at the experiences of particular individuals in immersions, in their roles as host families, interpreters and facilitators, and guests.
- **Section 3** stays with the individual, gathering together a collection of personal accounts written by immersion participants, and showing that immersions can have a profound impact on the individuals involved.
- **Section 4** explores how organisations are using immersions for different purposes: for staff selection, orientation, and training, for programme development and accountability, and to shape policy or strategy.

Each of these sections has a brief introduction by the guest editors, bringing out key insights, and pointing out links between sections. Each article also has a short summary or introduction to give a flavour of its contents.

The guest editors' closing editorial (pp. 133-139) reflects further on the articles in this special issue, drawing together learning and providing ideas for ways forward. They identify four

key elements of good practice in immersions:

- adequate investment in preparation and orientation;
- appropriate facilitation and interpretation;
- a willingness by participants to embrace the unexpected and personal; and
- support from employers and managers.

They also discuss the ethical dilemmas raised by immersions – the burden they place on the host families, the right of host families to privacy versus the need of participants to share and reflect on experience – and suggest some responses to these dilemmas.

A common thread running through the articles is the difficulty of assessing the impact of immersions, and this challenge still lies ahead, although the editors identify efforts to start to meet this challenge. Looking again to the future, the editors note the importance of 'moving beyond the converted', and of making immersions an accepted rather than exceptional part of good practice.

We hope that you enjoy this special issue, learn as much as we did about the principles and practice of immersions, and are inspired by the accounts of personal experiences and insights it contains.

Thanks

This issue is the result of a huge amount of work on the part of the authors, the guest editors, and the special adviser for the issue, Robert Chambers. We would particularly like to thank the guest editors for their continuing commitment to the issue as their input extended far beyond our original expectations. The extensive range of experiences and

perspectives captured in this issue is testament to their good-humoured perseverance. We would also like to thank the many authors and others who have contributed to this special issue for their patience with our many queries and requests for 'more'. A full list of contributors can be found on page 7. Thanks to Robert Chambers for first suggesting this issue, for his continuing support for it, and for triggering a heated debate about the current *PLA* format (to be taken up in our forthcoming readership survey). Lastly, we would like to thank Andy Smith, from our designers smith+bell, for his help and advice on the formatting of this issue.

Regular features

In touch

Much of our *In Touch* section is dedicated to resources relating to immersions, including books, tool kits, and videos. It also includes our usual reviews of new resources and our dedicated e-participation pages.

RCPLA pages

Find out the latest news from our partners in the *Resource Centres for Participatory Learning and Action Network*.

Other news from the *PLA* team

Forthcoming issues

Originally billed as issue 57, our next issue (*PLA* 58, June 2008) will be on the unspoken dilemmas of participation. It will be guest edited by Tom Wakeford and others. This issue will reflect critically on 'citizen participation' and its impact on policy-making processes, and look at ways forward.

- What can we do to promote improved policies and practices?

- Why are some participatory processes more oppressive than empowering?
- How can participatory processes become part of the solution?
- What is the power imbalance between those who are affected by new technologies and those who develop and control them?
- What can cross-cultural learning and global solidarity offer both North and South?

The issue will also include a general section with a selection of articles from practitioners.

In December 2008, *PLA* 59 will look at the emerging practice of using participatory web for development, often called 'Web 2.0' – free or very low-cost interactive web applications and services can enhance the ways we create, share, and publish information, and the ways we collaborate and share resources.

The articles have been selected from presentations made at the Web2ForDev 2007: Participatory Web for Development conference, held in Rome, 24th–27th September 2007.

The guest editors for this special issue are Jon Corbett and Holly Ashley. Jon Corbett is Assistant Professor at the Centre for Social, Spatial and Economic Justice at the University of British Columbia-Okanagan, Canada, and also a member of the Web2forDev Steering Committee. Holly Ashley is one of the co-editors of *Participatory Learning and Action*.

Some of the key questions that this special issue will seek to address include:

- How can Web 2.0 applications be integrated with participatory development approaches?
- How can they facilitate and contribute to people's participation and decision-making?

- What are the challenges and barriers to people's participation?
- How do we address factors such as access, equity, control, and oversight?
- Can Web 2.0 applications challenge fundamental social inequalities?

This special issue aims to publish a collection of articles, which provide working examples from practice.

Readership survey 2008: coming soon!

Should we redesign *Participatory Learning and Action*? Is the format still right for our readers – the size, the binding, the 'informal' look and feel of the series? And what about the content? Should we become more or less formal? Should we be more critical, more reflective?

We will be asking our readers all these questions and more in the next issue, in our 2008 Readership Survey.

News from the *PLA* editorial board

We are very pleased to welcome Peter Taylor to our strategic editorial board. Peter Taylor is leader of the Participation, Power and Social Change team at IDS. Peter is involved in research and advisory work linked to transformative learning and teaching approaches; higher education, participatory development and community change; and cooperative inquiry into capacity development challenges. He also convenes the MA in Participation, Power and Social Change at IDS. Peter co-guest edited issue 48 of *Participatory Learning and Action* on learning and teaching participation, and has been an active member of our international editorial advisory board since 2005. We very much look forward to working with him in 2008 and beyond.

Multimedia multilingual training kit on Participatory Spatial Information Management and Communication

Following on from the success of *PLA* 54: *Mapping for change: practice, technologies, and communication*, and the subsequent multilingual CD-ROM of the issue, we will be collaborating on a project to support the spread of 'good practice' in generating, managing, analysing, and communicating spatial information.

Practitioners, activists, and researchers have identified a lack of training materials as a major constraint in the spread of good participatory mapping practice. To address this, a consultative group is being set up to oversee the development of a modular multimedia and multilingual training kit on participatory mapping practice. The content of the kit will cover tested methods, tools and technologies for designing, delivering, facilitating, practising, and evaluating participatory mapping initiatives, grounded in *PLA* approaches.

The product of this project will ensure that participatory mapping and communication practices evolve and spread in an ethically conscious manner, ensuring that indigenous and other marginalised communities are effective in documenting, representing, and communicating their spatial knowledge, while taking a high degree of control over the process.

The project will be carried out in collaboration with CTA (the Technical Centre for Agricultural and Rural Development), based in the Netherlands, and is being jointly funded by CTA, IFAD, and the Ford Foundation Brazil, who were among our partners on the special multilingual CD of *PLA* 54. We are

also seeking additional funding for this project.

Case study series: 'What happens to the outputs of participatory processes?'

PLA and IKM Emergent (www.ikmemergent.net) are interested in producing a series of case studies illustrating how outputs from participatory processes can be fully used.

The last thirty years have seen a steady growth of the use of participatory methodologies in work with local populations for development research and development assistance programmes. Although such practice has often attracted criticism for its quality and depth, there is by now a substantial body of real achievement and communities of practitioners

dedicated to learning from and improving practice.

In most cases, participatory methodologies are used for a purpose. However, by definition, handing control of a discussion to a local community will alter the nature, focus, and reference framework of the discussion. Properly conducted participatory processes, even if they do result in outcomes close to the original purpose, almost invariably include a wider range of insight and local opinion than their original 'subject heading' might suggest.

What happens to the outputs? Are they used outside of their original purpose? If they relate to some research, that research is published. If they relate to a project, they are used to help plan or evaluate the project – are they then filed away? Due to limited awareness of their existence,

they will often not be used for related work, even within the same development organisation which funded or organised them, or, ethical considerations allowing, more widely by the sector. Local people may invest considerable amounts of time and efforts into processes designed to give them a voice, but the results are only partially used. This seems to constitute a waste of very valuable resources.

We are interested in good or bad examples of how such outputs can be used. See page 145 in our **In Touch** section for more information.

We hope you enjoy the issue and find much to stimulate your own thinking, as well as ideas to put into practice. Your feedback on the issue is very welcome, as always. Happy reading!

Holly Ashley, Nicole Kenton, and Angela Milligan

contributors

We are very grateful to the following people, who have all contributed to this special issue:

Dil Afroze	Saiful Islam	Ramilaben
Sohel Ibn Ali	Nasrin Jahan	Raziaben
Rabiul Hasan Arif	Vishal Jamkar	Syed Rukonuddin
Malin Arvidson	Dee Jupp	Sonya Ruparel
Taaka Awori	Kamlaben	Hawa Awuro Sam
Izzy Birch	Ravi Kanbur	John Samuel
Edward Bresnyan	Bosse Kramsjo	Olof Sandkull
Raffaella Catani	Saurabh Kumar	Savitaben
Robert Chambers	Raj Kumar	Göran Schill
Rosalind Eyben	Ulrika Lång	Fatima Jahan Seema
Gary Fields	David Lewis	Seetaben
Ama Gariba	Ruth Möller	Ashish Shah
Gauriben	Sam Mpanga	Shantaben
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Haridarkee	Esse Nilsson	Somita
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Staffan Herrström	Maria Norrfalk	Molly Sundberg
Jörg Hilgers	Frederick E. Nunes	Koy Thomson
Göran Holmqvist	Phebeans Oriaro	Helena Thorfinn
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Theme section

Overview

Immersion: something is happening

by ROBERT CHAMBERS

This issue of *Participatory Learning and Action* on immersion has no precedent. There have been earlier issues devoted to special topics. But none of its 56 predecessors have focused as this one does on the heart of development awareness, commitment, and practice. The experiences described here inspire and disturb. They challenge us professionally, institutionally, and personally. They show that, quietly, something with immense promise has been happening and is gathering momentum. They drive us to ask how much immersion could transform the quality of what is done in the name of development.

What are we talking about?

As the contributions in this issue show, immersion can take many forms. There is no template or formula. Some are self-organised or even spur-of-the-moment; some are organised with a programme. Some are open-ended for experiential learning; others are thematic, designed to focus on and learn about a topic or sector. Some are personal and individual; others more usually are in groups. An almost universal feature is, though, staying in a poor community, as a person, living with a host family, helping with tasks and sharing in their life. This can be for any number of days or nights, often between 1 and 10, with 3 or 4 perhaps most common. The overnight

stay is vital for relationships, experience, and relaxed conversations after dark. Even when immersion is thematic, they are usually quite open-ended. There may be activities like working with and helping the family, listening and dialogue, learning a life history, keeping a reflective diary, or trying to explain your work and its relevance. But the essence is to be open to the unplanned and unexpected, to live and be, and relate as a person. The unplanned incident is so often the most striking, moving, and significant. Much is experienced and learnt, but what that will be is hard to predict beforehand.

For all this the term **immersion** has come to be used: the visitor is immersed in daily life, having left behind the baggage of role, organisation, and importance, and stays for days and nights in a community. There is room for other related activities and terms to express them. For Sida in Bangladesh (**Jupp et al**) **reality check** is used for an innovative listening study with immersion that gathers information from structured dialogues with poor people. Different activities and expressions are fine as long as we say how we are using them. Here, I shall stick to **immersion**, including within that term activities with other names such as **EDPs** – immersion of the Exposure and Dialogue Programme (**Osner, Möller, Hilgers**) – and **Ashish Shah's reality check** of 'checking your work, ideology, and practice against the realities that poor citizens face.'

DFID staff work in the field for the host family collecting mulberry leaves, during an ActionAid immersion in China.



Photo: ActionAid

A gathering momentum

Especially over the past decade, immersions have been evolving quietly and gathering momentum. The build up has been slow but steady. Antecedents include the participant observation of social anthropologists. During the past few decades, increasing numbers of organisations have promoted and adopted immersions. Some, if not all, of the more prominent ones are represented in this volume.

The major early initiative was taken by Karl Osner who pioneered the Exposure and Dialogue Programme (EDP). Starting in the 1980s, there have now been 77 EDPs with almost 1000 participants (German parliamentarians, senior officials, leaders from non-governmental organisations (NGOs) and the private sector, aid agency, and government staff) in Latin America, Asia, Africa, and South Eastern Europe. SEWA (the Self Employed Women's Association), a very large trade union of poor women in India, has since 1991 been hosting EDPs for others (Kanbur, Fields, Patel), and

using them for its own staff since 1999 (Nanavaty, Shroff). After he became President of the World Bank in 1995, James Wolfensohn introduced immersions as part of the Harvard executive development programme for senior staff of the Bank (Nunes, Isa, Bresnyan). The EDP, SEWA, and World Bank streams came together in Ravi Kanbur's seminal immersion when he was leading the preparation of the World Development Report 2000 on development and poverty: part of his account of that experience follows this opening piece.

Then, in Sweden, the Global School has for years had a programme of 6 annual Global Journeys, each with 20 to 25 teachers spending 10 days with a rural family. These have been in various countries including Bangladesh, where they have been facilitated by the national NGO Proshika (Kramsjo). In several countries including India and Kenya, staff of ActionAid International have over the years practised immersions (Samuel, Shah) and now organise them for others (Awori, Eyben, Thomson, Ruparel). National NGOs use them for their

own staff (**Kumar and Haridarkee, PRADAN HRD Unit and Jamkar**). Among bilateral donors, a few DfID staff have taken part (**Oswald**). SDC has pioneered an intensive form of participatory research for staff in Tanzania, living and working with a very poor family for a day (**Jupp**). But it is Sida that has taken the lead, blazing the trail for others (**Nilsson et al, Sandkull and Schill, Jupp et al**). With senior staff experience and backing, Sida has officially endorsed and promoted immersions for its staff.

What immersions give

Some immersions have specific purposes. There are thematic immersions designed to focus on one sector or aspect of development, sometimes with organised programmes. There are immersions used for:

- project monitoring (**Isa**);
- for familiarisation in a new post, as when ActionAid India organised one for a newly arrived British High Commissioner;
- for experiential realism as part of a conference, as organised by SEWA for WIEGO (Women in Informal Employment Globalising and Organising);
- for the selection, induction, and capacity building of staff in India by various NGOs (**Kumar and Haridarkee, PRADAN HRD Unit and Jamkar, Shroff, Nanavaty**); and
- for programme development at the community level as by Plan Bangladesh (**Yakub and Islam**).

Agreement seems universal that immersions give insights and experiences that are not accessible in other ways. Those who participate learn in a personal way about people's lives, livelihoods, and cultures, and the conditions they experience. The world can be seen the other way round, from the perspective of people living in poverty. It is expressed in many ways and by many phrases – 'face-to-face', 'walking in their shoes', or 'putting a face on poverty'. This ground-truthing provides a touchstone to refer to, and a source of confidence, and the conviction of authority based on personal experience. On her return to IDS, Rosalind Eyben asked how discussions in a programme review connected with the lives of her hosts in a village in Ghana. This led her to make points she would not otherwise have made. Personal witness statements can often work to build up credibility and convincing ideas, communication, and arguments (**Nilsson et al**). Katy Oswald said that her experience in an immersion in China gave her:

the confidence to talk about poverty in rural China with some personal authority. You often come up against people who are ignorant of the level of poverty that still exists in

"...the essence is to be open to the unplanned and unexpected, to live and be, and relate as a person. The unplanned incident is so often the most striking, moving, and significant."

rural China and now, as well as referring to the statistics, I can refer to my own personal experience.

Quite often there are stark and startling insights, including:

- **Ravi Kanbur's** 'master of Mohadi' incident which he says 'encapsulated for me the gap between macro-level strategies and ground-level realities';
- the realisation by **Olof Sandkull** and **Göran Schill**, through their immersion with a tsunami-affected family, that in the second 'tsunami', of foreign funds, those who had lost most received least;
- **Gary Fields** revising his professional economist's view of the impacts on poor producers of the minimum wage; and
- a participant in an HIV/AIDS-related immersion in Western Kenya who said 'I've learnt more about HIV/AIDS and its impact in the last 24 hours than I have in the last 6 years that AIDS affected my family' (**Shah**).

Impact on policy is also stressed:

*The experiences gained from the immersions made a crucial impact on the direction of the forthcoming country strategy, steering it towards a sharpened poverty focus and a commitment to participatory research (reality checks) as a means of gaining insights into the perspectives of people living in poverty (**Nilsson et al**).*

All this is enough to justify immersions over and over again. If this were all, the case would already be overwhelming. But people repeatedly say they gained much more than just useful insights and knowledge. They stress, and often give more importance to, the experiential learning, the personal and emotional impact. This resonates with other expressed purposes. **Fred Nunes** writes that James Wolfensohn 'wanted managers who had heart as well as intellect'. The aim was to '...rekindle the staff's passion for poverty reduction.' **Bosse Kramsjo** asks how thinking and intellectual shifts can happen without complete involvement. Göran Holmqvist (in **Nilsson et al**) says that his immersion offered what he most hoped for, 'an alternative way of learning,

“Agreement seems universal that immersions give insights and experiences that are not accessible in other ways. Those who participate learn in a personal way about people’s lives, livelihoods, and cultures, and the conditions they experience. The world can be seen the other way round, from the perspective of people living in poverty.”

through emotional exposure rather than conventional intellect.’ He had been given a ‘gut feeling’ of the life and perspectives of the people he lived with. **John Samuel** writes of his immersions as intense personal moments: ‘They make me restless but hopeful. They disturb me deeply, but at the same time recharge me. More than anything they challenge me.’ For **Koy Thomson**, having the time and space for unlearning was important. For **Taaka Awori**:

The immersion has helped me grow as a development practitioner, but more importantly as a person. It was a very different way of learning for me because I learnt experientially. In that sense, all of me was learning, not just my mind, as is usually the case. The immersion allowed me to stop analysing people living in poverty as objects of development, but rather just to be with them and allow the learning to emerge.

The best should not be the enemy of the good; and many immersions may not be such deep experiences, or so transformational. No one should feel they have somehow failed if their experiences seem less remarkable or moving than those described in this collection. Immersions can be serious but also inspiring, and can have their lighter side, with laughter, fun, singing, and dancing. What matters, the accounts that follow suggest, is heart as well as mind, an open and learning frame of mind and being. For **Qazi Azmat Isa**, ‘immersion allows profound learning.’ Of the SDC participatory research with poor families in Tanzania, Dee Jupp (**Jupp et al**) writes:

The outcomes of the exercise were extraordinary. Not only was a wealth of insights into the life of poor households gathered, but the experience turned out to be transformational for many of the research team.

Why did immersions not take off earlier?

If these experiences can mean so much and make such a difference, why have they not spread more and been more widely adopted? It seems so evident that they should be part of responsible personal and professional practice. They cost less than going to a workshop. They take little time – usually not more than a week. It is not as though most organisations lack money: funds for training, capacity building, and professional development are frequently under spent.

Three clusters of forces stand out as explanations.

The first is personal. It is easy to make excuses, especially being too busy with important work. But this does not stand up to scrutiny. There is time for a workshop, within our comfort zones, but not for an immersion which is outside, unfamiliar, threatening (**Ruparel**). For myself, I am reluctant to give up what is known, cosy, and controllable for the unknown, perhaps uncomfortable and uncontrollable. I fear behaving badly and making a fool of myself. And here I and others must thank Ravi Kanbur for his ‘I don’t think I want to go to that temple any more’ (in **Birch et al**). This makes it easier for me to acknowledge my own shameful mistake, so hurtful to our host lady in Gujarat, of going to sleep instead of meeting the people who had come across the desert to meet us. And there are other arguments that can be mustered: ‘I know all about that. I grew up in a village (or slum). I don’t have anything to learn about that’ (**Shah**). Against which can be set the reflections of participants in Views of the Poor (**Jupp**):

I thought I knew about village life as my roots are in the village and I still visit family in my village from time to time. But I know nothing about what it is like to be poor and how hidden this kind of poverty can be.

The second cluster of forces is institutional. These are so many: values and incentives that reward writing good memoranda and reports and speaking well in meetings with important people; and the low value given to listening to the unimportant poor. There are senior staff who regard immersions as frivolous, useless or voyeurism, and/or feel personally threatened by them. There are normal pressures of work and other perceived priorities. Bureaucratic culture looks inwards and upwards, not downwards and outwards.

A third force is current rhetoric about development relations. For lender and donor agencies, there has been the convenient political correctness of government ownership. For international NGOs there has been increasing reliance on the insights of partners who are supposedly close to poverty.

Photos: Tom Sharman



Joining in with the village celebrations.



Joining in with the traditional dance routines.

To seek direct personal experience through immersions could then be thought of as untrusting and interfering.

These personal, institutional, and rhetorical forces combine. Any organisations or individuals who want excuses for not pressing for immersions have no difficulty finding them. It is not difficult, then, to understand why until recently effective demand for immersions has not been strong.

Why now?

The evidence presented in the articles of this issue would have made a powerful case for immersions at any time in the past. With hindsight, one can lament that development decade after decade has gone by without their adoption. But the contemporary case for making them standard practice for development professionals is now even stronger than ever. This is for three reasons.

First, changes in the conditions, awareness, priorities, and needs of poor people are changing faster than ever before. Almost everywhere, social change is accelerating. There is then a continuous and intensifying challenge to policy makers and practitioners to keep in touch and up to date.

Second, in very recent years, a new simplistic certainty has infiltrated some development thinking and practice. The downside of the Millennium Development Goals (MDGs), and of the inspiring movement to Make Poverty History, has been the belief that 'we know what needs to be done' (especially in Africa) – and that the solution is more money. The issues are not so simple; nor in most cases are the solutions. For vital ground-truthing, immersions provide one means of checking against the complex and diverse realities of poor people.

Third, the grip of the urban and capital traps has tight-

ened, for government, official aid agency, and international NGO staff alike. They are tied down by more and more meetings, negotiations, emails, and reports, often with fewer staff; by participation in the pandemic of incestuous workshops, many of them about poverty; by discussions around donors' budget support, sector-wide programmes, and harmonisation on policy issues, all of this in what **Koy Thomson** calls our 'self-referential universe.' **Qazi Azmat Isa** speaks for other agencies too when he notes that 'increasingly, World Bank staff are confined to government departments in capital and provincial cities, removed from the reality of poverty and from our ultimate clients – the poor of the country.'

Immersions are means to offset these biases and trends: to keep up to date; to be in touch; to escape the self-referential trap. It is fitting and fortunate that they are rising fast on the agenda. As this issue of *PLA* shows, they are now better understood. They are more talked about and easier to arrange. More organisations – EDP, SEWA, ActionAid, Praxis, Proshika – are providing them for others. More people and more organisations are setting them up for themselves. The increasing numbers of people who have experienced immersions, and the conviction, commitment, and authority with which they can speak, encourage others. We appear to be approaching a critical mass of experience, stories, buzz, communications, and enthusiasm. Immersions are increasingly recognised as good professional practice that must be encouraged and supported, and more and more people have made them a regular personal practice (e.g. **Osner, Kanbur, Fields, Samuel, Ruparel, Shah**).

So now, in the 21st century, after 6 decades of 'development', immersions are more needed than ever; and may at last be at a tipping point, about to take off.

“This demands vision, leadership, guts, and priority. It means that ministers, permanent and principal secretaries, chief executives, and senior managers, in aid agencies, governments, and NGOs, must set examples through their own immersions and make space for others to do likewise.”

So what?

The implications are quietly revolutionary. The experiences in this issue of *PLA* challenge the imagination. Read the contributions and ask yourself: what would have happened if the experiential learning and reflection of immersions and reality checks had been the norm of good practice by development professionals over past decades? Would the deprivations, suffering, and death inflicted on poor people by structural adjustment have been perpetrated if those responsible had spent a few days and nights immersed in a poor affected community? Might not those responsible have put a face and a person on the human price and sought other policies? To be more realistically pro-poor, could there conceivably have been any more cost-effective use of their time than an immersion? The gratuitous suffering that might have been averted blows the mind.

And what about us, now?

What would those living in poverty want us to do? Would they, as Koy Thomson has asked ‘express their amazement that people who are experts in poverty don’t even bother to spend time with them’? As he observes, ‘For a development organisation to see 4 days simply being with people living

in poverty as a luxury is a sign of pathology.’ The question is not whether the direct experiential learning of immersions and reality checks can be afforded. It is whether anyone in any organisation committed to the MDGs, social justice, and reducing poverty, can justify not affording and making space for them. Should they follow Göran Schill who began as a sceptic, and then after 3 days and nights with a tsunami-affected family exclaimed that ‘Everyone at Sida should do an immersion!?’

The cumulative evidence presented in this special issue drives us – however reluctantly and with whatever discomfort – to see personal experiential learning, face-to-face, with those we seek to serve as a key missing link in development practice. Wriggle though we may, the conclusion, the message, is there: to be serious about poverty, we have to be serious about immersions.

This demands vision, leadership, guts, and priority. It means that ministers, permanent and principal secretaries, chief executives, and senior managers, in aid agencies, governments, and NGOs, must set examples through their own immersions and make space for others to do likewise. It means that, like Sida, other organisations must make immersions official policy and encourage or require staff to undertake them. It means too that time for them must be ring-fenced to avoid postponements or cancellations, and that resources must be made available. In sum, politically, and as policy and practice, immersions have to be given priority.

So the final discomfiting question is this. After the testimony and evidence of this special issue, can any of us make a credible case for not doing immersions? And if we cannot, what are we going to do about it?

Will we, can we, rise to the challenge and seize the opportunity? And if we do, more and more, may that over the years transform the quality of what we do and what happens in the name of development?

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2

Basrabai, Meeraiben, and the master of Mohadi

by RAVI KANBUR

'One of the most educational and moving experiences of my life.' This was how Ravi Kanbur described the time he spent in a village in Gujarat in 1999. His visit was organised by SEWA, a membership organisation of nearly one million women who work in India's informal economy. His host, Basrabai, is a member of SEWA. SEWA's experience of hosting what they call Exposure and Dialogue Programmes (EDPs) is discussed in Section 1 (Nanavaty *et al.*) and Section 4 (Shroff). The EDP in which Professor Kanbur participated was designed as part of the process for developing the World Bank's 2000/01 *World Development Report: Attacking Poverty*, which he was leading. This description of his experience in Mohadi village has become a seminal account in the history of immersions.

As we arrived in Mohadi village, Kutch district, after a long drive, the first building we saw was the primary school. We were told by Meeraiben, our chief SEWA facilitator, that the school had served an important function. In last year's cyclone, the worst in living memory, as their straw huts were blown away the villagers took shelter in the only stable structure in the village – the concrete-built school.

My host lady was called Basrabai. We arrived at her house, a one-room concrete structure next to a straw hut which was there before. After the usual greetings, almost the

first topic of conversation was the school. Since it was a week day, we wondered if it would be possible to go and sit in on a class. Basrabai then informed us that the master (the teacher) was not there, had not been there for a while, and in fact came once a month, if that. He seemed to be protected by the district-level education officer, and could do pretty much what he wanted.

In fact, the master came the next day, because word had got to him that the village had visitors. Thinking the educated guests to be kindred spirits, he launched into a litany of the difficulties of teaching the village children. He referred to them as 'jungle' (from the jungle), a put-down instantly recognisable in India. This was too much for Meeraiben, who pointed out that his job was at least to show up. Parents were anxious for their children to learn to read and write, even if school attendance meant that the boys could not help their fathers with fishing and the girls could not help their mothers fetch water and wood and work in the fields. The 'master of Mohadi' incident encapsulated for me the gap between macro-level strategies and ground-level realities in the poverty reduction discourse, a gap which was revealed again and again in the next few days.

In the evening, right in the middle of a meeting, there was a commotion at the side. While trying to separate two

fighting cows, Basrabai's brother had been seriously gored in the face. It was late at night, and the nearest doctor was in the next big settlement, 10 kilometres away. Without immediate treatment, the wound was bound to get infected. As it happened, our jeep was there and the brother was taken to the doctor and brought back. The fragility and vulnerability of rural life was brought home to me in this incident. As Basrabai later recounted, if it had not been for our presence, and with luck the wound just missed the eye, she would have had to have been responsible for him for the rest of her life.

On our last day we went to Basrabai's field, an hour's walk from her house, where she was trying to grow millet. The riskiness of agriculture was there for us to see. The lack of rain had left the ground hard and dry. If it didn't rain in the next few days, Basrabai informed us as she collected grass for her cattle, the crop would be lost, and with it the outlay she had made in having the field tilled by a hired tractor driver.

Back in Ahmedabad, all the participants tried to make sense of what they had experienced. Alongside the emotion of the experience (the quiet dignity of our host ladies, and the utter commitment of our SEWA facilitators, moved most of us to tears as we told our stories) we tried to analyse what we had seen and to relate it to the more conventional discourse on poverty reduction strategies. For my part, I tried to relate what I had seen to our proposed *World Development Report* themes of Empowerment, Security, and Opportunity. These themes have considerable resonance in Basrabai's life, but what also came out was the interrelationship between them and how one fed into another. One without the other does not make sense; one before the other does not make sense.

In fact, Basrabai, Meeraiben, and the master of Mohadi

crystallised for me a line of argument which goes as follows. The focus of the Bank and other agencies might be characterised as tracing out the 'Production Possibility Frontier' of pro-poor policies and interventions. We look across countries, regions within countries, communities within regions, and households within communities, to identify the determinants of poverty reduction. This is of course a very valuable exercise. But what it cannot do is to even begin to tell us how and why certain policies were chosen in one place and not in others. In other words, the demand side of pro-poor policies and interventions is largely missing from our analysis. This is particularly true of very local-level outcomes, which have a dynamic all of their own.

It is a tautology, but nevertheless a useful tautology, that in societies where the poor have access to and influence over decisions which affect their lives, at the macro level and at the very micro level, pro-poor policies and interventions are more likely to be adopted and implemented. Surely, then, it must logically be part of an anti-poverty strategy to help develop structures and institutions which do indeed give poor people such access and influence. What stands out for me from the Mohadi and SEWA experience (and actually from a sheaf of more formal political economy papers) is the crucial role of Organisations of the Poor – i.e. membership-based organisations who articulate the demands of their members, who defend their rights, who monitor interventions, and who hold the polity accountable to the poor. Such organisations do not just appear out of thin air. It has taken SEWA a quarter of a century to arrive at its current stage of influence over local and national policies and interventions. But international agencies could do worse than ask themselves how their own actions and interventions could support and help the development of Organisations of the Poor.

NOTES

This is an extract from a longer report, written after an Exposure and Dialogue Programme (EDP) with SEWA in July 1999. The full version is available from the author.

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Section 1: Evolution of immersions

This first section begins with the story of how immersions have evolved. **JÖRG HILGERS** explains the methodology of the Exposure and Dialogue Programme Association in Germany, which has had a fruitful partnership with a range of organisations in Latin America, Asia, Africa, and Europe. He concludes by noting that the systematic assessment of the impact of immersions remains a key outstanding challenge for the EDP Association. A good complement to this article is the final piece in Section 4, written by Karl Osner, who pioneered the EDP approach.

REEMA NANAVATY, SEWA's Director for Economic and Rural Development, discusses the importance of EDP for SEWA, a membership organisation of self-employed women working in India's informal economy. SEWA is one of the foremost Southern-based organisations hosting immersions for participants from both North and South, as the articles in Sections 2 and 3 by Ravi Kanbur, Gary Fields, and Praful Patel testify.

The World Bank Group began its Grass Roots Immersion Programme (GRIP) in the mid-1990s. **FRED NUNES** explains how it all began, reflects on the Bank's efforts to learn and change, and closes with some thoughts about where the Bank might go from here. **PRAFUL PATEL**, Vice-President for the South Asia region, and some of his colleagues then discuss the experience of the programme in South Asia, where it is known as the Village Immersion Programme (VIP). This article could usefully be read alongside that by **QAZI AZMAT ISA** in Section 4, in which the author explains how he and his team use immersions to monitor the impact of the World Bank-funded Pakistan Poverty Alleviation Fund.

Finally, **SONYA RUPAREL** tells the story of immersions in ActionAid. Its offices and partners in several countries in the South have hosted immersions for officials from donors, NGOs, and governments. The approach they use involves a high level of support to participants. Further aspects of Action Aid's approach are discussed in subsequent sections. In Section 2 **DEE JUPP** explains the type of facilitation involved while Sonya recounts a cautionary tale about the perils of poor interpretation. In Section 3 three participants from an ActionAid-hosted immersion in Ghana recount their experience. The approach described by Sonya is just one part of ActionAid's portfolio of immersion experience: staff in ActionAid Kenya have for several years used 'reality checks' to test their practice against the experiences of those living in poverty, as **ASHISH SHAH** describes in Section 4, while **JOHN SAMUEL**, ActionAid's International Director, has a long history of making personal visits to villages in different parts of the world to be challenged and re-energised by the people he meets. He tells the story of one of these visits in Section 3.

3

A portrait of the Exposure and Dialogue Programme Association

by JÖRG HILGERS

This article describes the methodology used in immersion programmes organised by the Exposure and Dialogue Programme Association in Germany. Working in partnership with local organisations, the Association brings influential decision makers into personal contact with poor and marginalised people, and the realities of their daily lives. Each programme has a theme focusing on specific dimensions of poverty and avenues for its reduction. Where possible, both non-national and national policy makers participate in the programmes. After describing the development and implementation of EDPs, the author discusses the learning experiences of participants and host families. He concludes by noting that a key challenge for the Association is to measure the personal and institutional impacts of EDPs in a systematic and scientific way.

About the EDP Association

The Exposure and Dialogue Programme (EDP) Association (formerly the Association for the Promotion of North-South Dialogue) was officially set up by the German Commission for Justice and Peace in 1992. However, EDP-type programmes have been conducted since 1985 (see Osner, this issue). The Association is membership-based and

supported by various Catholic Church-related institutions in Germany.¹ Since 1985, 77 Exposure and Dialogue Programmes have been conducted with almost 1,000 participants in Latin America, Asia, Africa, and South Eastern Europe. Committed to integral human development, the EDP Association stays above partisan politics. It cooperates with 'all people of good will' and does not discriminate against people on the grounds of their religious, cultural, or confessional affiliations.²

Exposure and Dialogue Programmes allow influential decision makers from various sectors to learn about poverty, the self-help capacities of the poor, and the dignity of poor and marginalised people by immersing themselves in the daily lives of poor families. The EDP Association works in cooperation with institutions that promote people's participation in different ways. For example, SEWA in India; CEPROLAI in Bolivia; and UML and the Centenary Rural Development Bank in Uganda.³ Through local partners like

¹ 'Integral human development' is the overarching goal of Church development work. Cooperating with 'all people of good will' is a Principle of the Church's social doctrine. See Pope Paul VI (1967) *Populorum Progressio* (Progress of the People).

² For details, visit www.exposure-dialog.de/english/ueber_uns/werwirsind/werwirsind.html

³ SEWA is the Self-Employed Women's Association; CEPROLAI is the Centro de Promoción al Laicado; UML stands for Uganda Microfinance Ltd.

German MP Hartwig Fischer preparing the day's catch for the market – learning how people make a living from scarce natural resources.



Photo: Hartwig Fischer

these, families are identified who are willing to host visitors for 3 to 4 days. One important criterion of selection is that families strive to help themselves using their own capacities.

Those taking part in EDPs include members of parliament, administrators, business and development agency managers, Church clergy and pastoral workers, educationists, and media people. Where possible, an EDP includes both visitors from abroad and country-based policy makers. An important role of country-based participants is to accompany the visitors from abroad when they immerse into life with the host families. This provides an opportunity for both nationals and foreigners to narrow the gap between 'the big people from the centre' and those affected by their decisions. EDPs aim to show participants how 'a way out of poverty is possible' and under what kind of circumstances people can see 'light at the end of the tunnel' (participants'

testimonials). In the words of the EDP Association motto, 'development has got a face'.

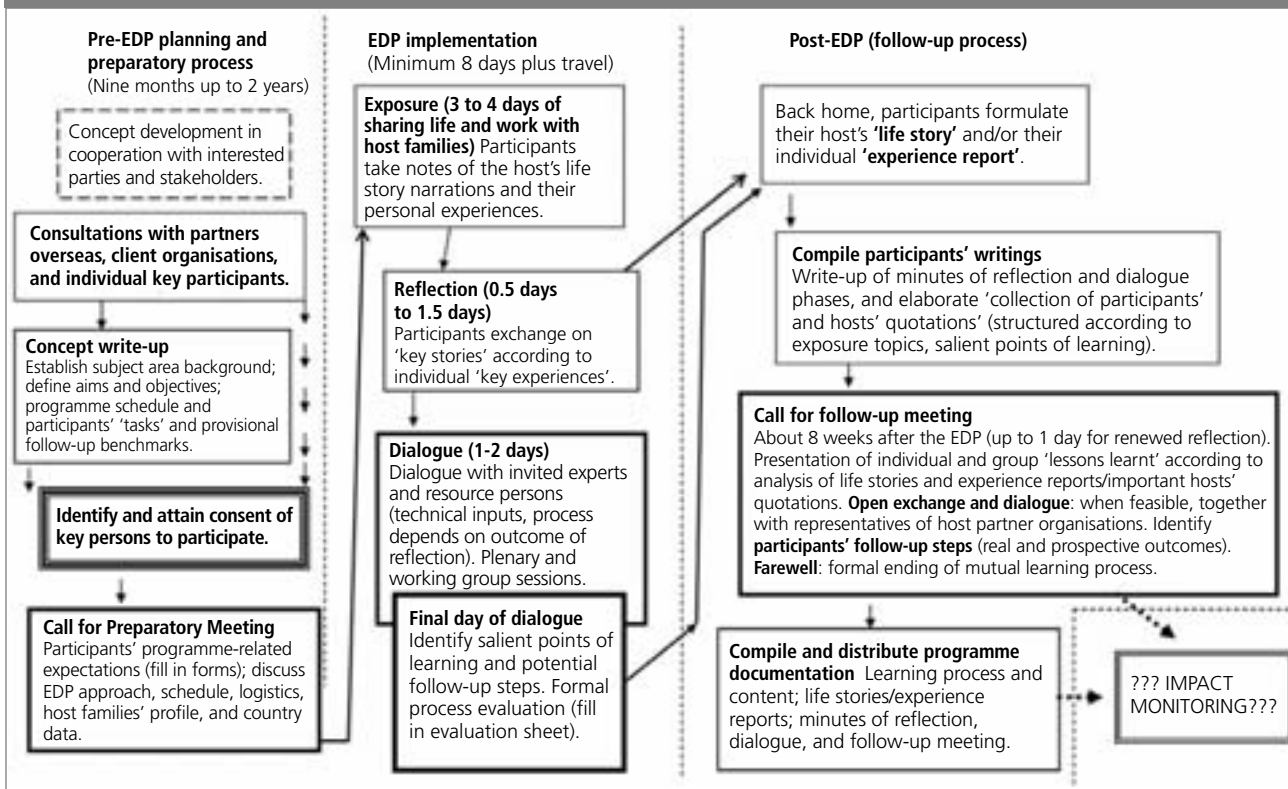
The Association currently conducts two to three regular programmes per year, each with an average duration of 8 to 10 days. However, there is growing demand, especially from Government institutions wanting to use EDPs for personnel development.

Themes and participants

While personal encounters with poor and marginalised people are key to a holistic understanding of their reality, each programme has a theme focusing on specific dimensions of poverty and avenues for its reduction. The Association ensures that themes are of interest to local partners and the client organisation that is supporting the EDP.

Since 2002, the EDP Association has conducted 15

Figure 1: Flow of standard EDP procedures



Copyright: EDP Association (Bonn/Germany) by Jörg Hilgers

regular programmes in partnership with local organisations in Albania, Bolivia, the Dominican Republic, Guatemala, India, Malaysia and Singapore, Tanzania, and Uganda.⁴

A typical EDP has 16 to 20 participants, plus exposure group facilitators.

EDP Programmes have mainly dealt with four subject areas:

- microfinance services (instruments, regulations, operative sustainability, clients' entrepreneurial skills);
- popular participation and self-government (democratisation and decision-making processes at local level);
- water resources and supply management (procedures of self-government and user associations); and
- migration in the context of land use, land ownership, income opportunities, and access to public services.

However, other issues such as education, health, income opportunities, gender and women's development, cultural values, religion, and spirituality are often discussed too. For example, during an EDP in Uganda focusing on microfinance (2006), participants and external experts ended up

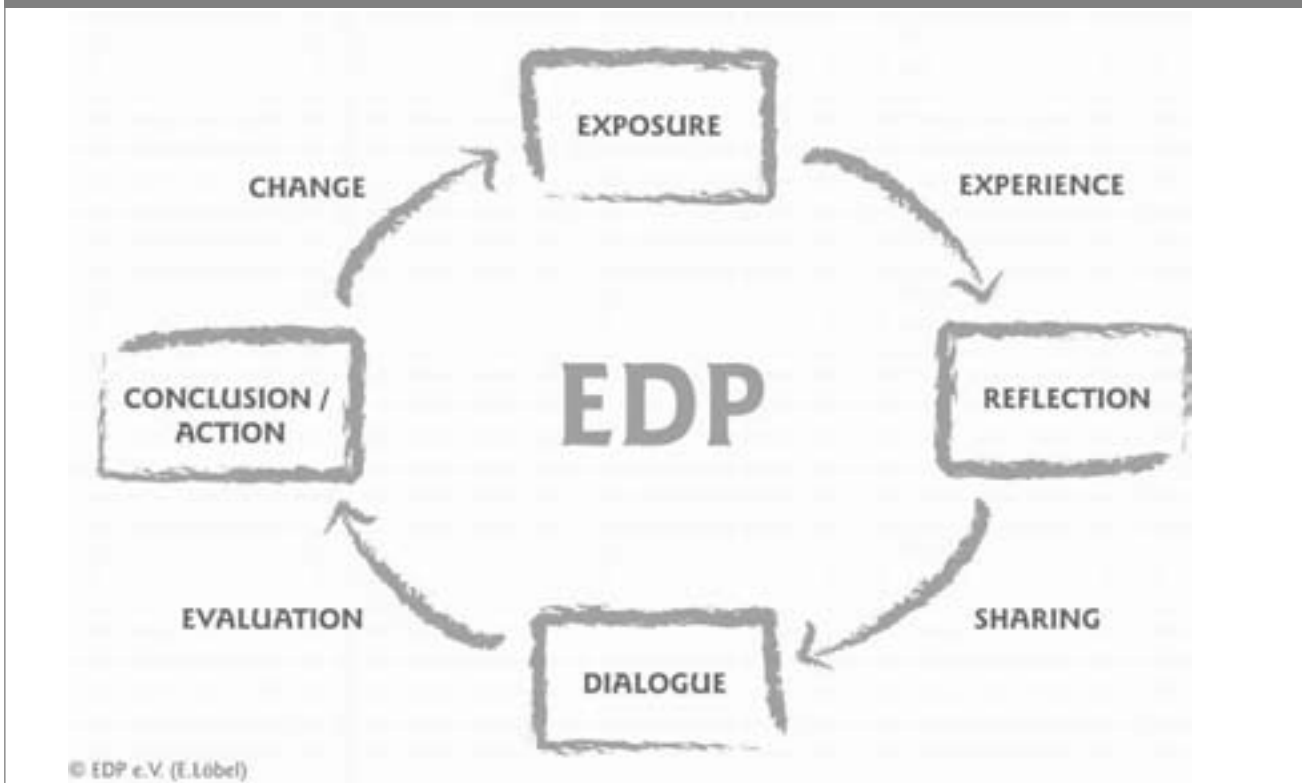
discussing the need to improve vocational training in the agricultural sector. In this way, Exposure and Dialogue Programmes help deepen understanding of **integral human development**.

Developing an EDP

EDP planning is a complex process in which the diverse interests of local partners, potential client institutions, and individual participants must be established and taken into account. Before a programme is implemented, there are four major preparatory steps:

- **Programme development:** generate acceptance of EDPs as learning tools among relevant stakeholders in a subject area particularly important to them. This requires investigation and talks with key persons and institutions in different sectors, during which the target group (would-be participants) is identified. 'EDP must have the potential to help them [participants] solve at least some of their institutional problems.' (Karl Osner)
- **Developing local partnerships:** identify, visit (several times), and convince innovative partner organisations. The EDP

⁴ See list at: www.exposure-dialog.de/english/Partner/partner.html

Figure 2: The EDP methodology

Association is neither a funding agency nor operational in any partner country. Therefore, it relies heavily on its partner organisations' expertise, administrative and human capacities, and good relations with host families. We talk openly with our partners and avoid raising wrong expectations. For instance, EDPs are not fundraising opportunities for partner organisations, although they can offer benefits such as contacts with key individuals and organisations, and opportunities for developing higher-level cooperation or specific sectors of work.

Respecting the host families' dignity is also vitally important. So is agreement with the organisation's staff on how to facilitate the personal encounter between visitors and hosts. Some 6 to 8 weeks before the EDP implementation, the organisers visit and prepare the host families, and a facilitators' training session on how to apply EDP methodology is conducted.

- **Finding participants:** enlist key people. Here, having a functioning network of client institutions, EDP supporters, and former participants is indispensable. Personal testimonials about the benefits of an EDP are essential when trying to

convince potential participants. Once the client organisation agrees, identifying country-based (both national and international) participants and persuading them to participate is a difficult task. It requires in-depth country knowledge, a reputation for personal and institutional integrity, and good contacts in the host country.

- **Building sectorial and technical partnerships in the host country:** an EDP is not just an exposure programme, but also an opportunity for dialogue to bridge the gap between micro- and macro-level experiences. Programme sector experts and key host country representatives have to be identified and persuaded to be resource persons in the concluding EDP dialogue workshop. The institutional reputation of the partner organisation in the host country is vital in this process.

The EDP methodology

Today's methodological approach is the result of an organisational learning process with partners and participants.⁵

⁵ See www.exposure-dialog.de/english/methode/methode.html

Ms Carol Namuleme, branch manager of Uganda Microfinance Ltd, presenting facilitators' reflections.



Photo: EDP Association

A regular programme consists of three main phases – exposure, reflection, and dialogue – and lasts for 8 to 10 days.⁶

A participants' **preparatory meeting** (4 to 6 weeks before travelling) precedes the Exposure and Dialogue Programme. Upon arrival in the host country, participants, partners, and facilitators get to know each other in a preliminary session.

The actual **exposure** – sharing life and work with the host families with overnight stays at their homes – accounts for about 3 to 4 days, depending on the overall duration agreed. Each exposure group is composed of three people: two visitors from abroad or country-based (preferably, a man and a woman) and the local facilitator.

After exposure, a guided phase (of 1 to 1.5 days) of individual **reflection** in small groups establishes what participants have learnt during their personal encounters. Participants try to capture this in key stories. These are shared in the group.

⁶ Some clients, like Church bodies and NGOs, may wish to invest more time in the learning process, for which customised schedules can be offered. The EDP Association also organises brief exposure visits by parliamentarians who stay with a host family for one night only in the course of an official bilateral visit.

They serve to identify important topics and issues for discussion in the concluding **dialogue** with external resource persons and experts, which takes up to 1.5 days.

On the last day of the dialogue workshop, everyone involved is asked to consider follow-up steps, based on both the exposure experiences and discussion with external resource persons. Participants are grouped according to sectors or the institutions they represent, allowing them to discuss particular issues in more detail and then to select what they share with others in the plenary. Depending on the character and the background of those involved, the closing workshop may function as a platform for political dialogue from which further actions for following-up institutional change may derive.

- A **follow-up meeting** takes place 2 to 3 months later. Prior to this, participants write a life story of their hosts and an experience report. This helps them sum up their experiences, and understand and evaluate them ('If you write it, you start to mean it.' Ela Bhatt, SEWA).⁷ These accounts are written some weeks before the follow-up meeting so that participants' writings can be compiled, analysed, and presented as 'salient points of learning' to the group to complement the mutual learning process. The learning points are linked to the aims and objectives of the programme. For example, in an EDP about microfinance, participants' may highlight learning on the effects of improved access to financial services on the host family, business development, and local markets.

In the follow-up meeting, participants scrutinise the list of potential follow-up steps and comment on the progress of their work, noting where concerted action or revision of ongoing activities is needed.

To **monitor and evaluate** the participants' learning process, the Association uses several tools.

- Before the exposure, participants fill in forms regarding personal motivation and outcome-related expectations.
- At the end of the dialogue workshop, they fill in individual process evaluation sheets.
- After returning to their posts, they write-up their host's life story and experience report (see above).

Although there has been some delay due to ongoing programme preparation, the EDP Association has documented most of the programmes implemented since 2002 (mostly in German).

⁷ For example: www.exposure-dialog.de/english/lebensgeschichten/life_stories/Sehbrock.pdf

When reflecting on exposure experiences, EDP participants bring along an item or symbol which reminds them of sharing life and work with their host family. These items are placed in the centre of the workshop room and help participants focus on the hosts and their lives.



Photo: Christa Dirksen

Participants' expectations and learning experiences

When participants join EDP for the first time they generally indicate the following expectations:

- learning more deeply about the overall situation and the people in a country of their interest; and
- an opportunity to 'reality check' their professional experience and technical knowledge, e.g. participants seconded from BMZ (the German Development Ministry), GTZ (the German Agency for Technical Cooperation), or KfW Development Bank (a German government-owned development bank).

Policy makers in various institutions use EDP especially to:

- develop more appropriate concepts and technical instruments for poverty reduction; and
- prepare themselves for policy dialogue.

Other organisations see EDPs as a tool for learning from the poor about specific aspects of their lives, e.g. the enterprising spirit of microcredit clients, or solidarity in situations of distress and marginalisation.

Most participants' find that their expectations have been

met when they evaluate the EDP process 2 to 3 months later. The host life stories and experience reports that participants write illustrate the depth of the learning processes EDP stimulates.⁸

Whenever I have to decide on a new project, I picture the faces of my host family and ask myself: what would be the impact of this project on a family comparable to the one I stayed with?

KfW Development Bank official

After I worked almost 6 hours to collect firewood for the preparation of the night's meal, together with my host lady, I came to understand why she wanted to have a gas cooker as soon as there would be some cash money left. In other words, by sharing their perspectives, EDP helps politicians to learn about people's true priorities.

Member of German Parliament

⁸ See other quotes from participants at: www.exposure-dialog.de/english

I have realised that my life in the capital does not at all relate to the life of the poor in those local communities up-country. To feel that type of truth is the best learning experience, which may lead to realistic problem solving, instead of relying on theories, only.

Official of Tanzanian Ministry of Water

Host family experiences

Visitors have a flight ticket in their pockets and after few days go back home with many personal insights and a range of lessons for their work. But what are the benefits for hosts and how do they feel about the encounter? Asked after some time, most of them reply in a similar way to the two women quoted below:

First, I would have never dared to invite people from Europe to my humble home. It was amazing how much they liked to be part of my family. Actually, I am astonished that they wanted to work in my shop, fetch water, and even help the girls with the cooking. They really wanted to be with us, eat the same type of food, and sleep under this roof. I never thought that Europeans would be interested in the life of an ordinary African woman like me. They showed me pictures of their families and the offices they work in. They really wanted to share with me. It has been an honour to host them.

Mariam Alidekki, microfinance client, Uganda

I did not know that Germans and Albanians have so much in common. They are like us. They also work hard so that their children can go to school because things are expensive there. They like to talk and laugh. They have come to see us. They wanted to know about our life. They have not forgotten us. Now I understand what they meant by 'Albania is part of Europe'.

Donika Rroku, women's group member, Albania

Impact of EDPs

To facilitate personal encounters between people who lack material resources and access to basic services and those who control such resources and access services is a delicate task. Although EDPs may use certain social techniques, a true personal encounter is a gift that cannot be generated or produced in any technical manner. However, EDPs can guide people of very different socio-economic backgrounds and cultures in this encounter. EDPs challenge people to comprehend the integrity of human life and struggle for 'develop-

ment' in all its dimensions: 'Sharing in the life of another person calls for deep respect and grateful reflection' (Leo Schwarz, EDP Association Chairman, 2002 to 2007).

The Association has not yet managed to measure the personal and institutional impacts of EDPs in a systematic and scientific way. Due to resource limitations, participants' reports on their post-exposure actions are often analysed only to prove the validity of the EDP as a learning tool. It is difficult to relate this learning to specific development outcomes such as poverty reduction.⁹ Donors often expect the participation of high-level decision makers in EDPs to have an immediate political impact, overlooking the fact that creating a stronger social backing for poverty reduction amongst decision makers is a long-term process whose benefit may become visible only after several years.

Although it is difficult to establish direct and tangible impacts on poverty, by looking at participants' testimonials it becomes clear that EDP:

- supports attitudinal change towards the human capacities and dignity of poor people;
- deepens the quality of insights into complex situations in the countries visited; and
- increases the likelihood of pro-poor decisions and alliances.

The following are examples of activities participants have become involved in post-EDP.

- A board member of the German Bundesbank has become one of the most active advocates for microfinance services in the German private sector; and recently three directors of (small) German banks have paved the way for joint ventures in funding professional micro-banks in the developing world.
- A former German government cabinet member has facilitated a formal partnership between her constituency in the Eastern part of Germany and her exposure region in India, which has been active for seven years now.
- The Federation of Catholic Chaplaincies at German Universities now uses the EDP concept as a tool for students' personality building and creating awareness of poverty and development issues, thus helping form pro-poor élites before participants become 'real' decision makers.
- German development organisations (BMZ, GTZ, and KfW Development Bank) regularly use EDP for personnel development and demand from personnel, at times, exceeds availability.

⁹ Kuby calls this gap between the direct benefits a project might have and development outcomes the 'attribution gap' (Boru Douthwaite and Steffen Schulz, 2001; download: www.ciat.cgiar.org/inrm/workshop2001/docs/titles/4-1APaperBDouthwaite.pdf)

The direct costs of implementing programmes are regularly met by participants' fees. This is an important indicator of EDP's positive impact in the eyes of client organisations.¹⁰ Nevertheless, income from participants' fees does not cover overheads. When the overhead

budget is renegotiated with Church institutions in 2010, it will become clearer whether appreciation of the EDP Association's work within Church circles matches that of client organisations in government and civil society sectors.

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NOTE

Perceptions and opinions expressed in this article do not necessarily reflect those of the EDP Association's management or owners.

¹⁰ Since 2002, EDP management policy has stressed the importance of cost recovery from participants' fees for each programme.

4

Exposure and Dialogue Programmes at SEWA

by REEMA NANA VATY

This article describes the Exposure and Dialogue Programmes organised by SEWA, an organisation of self-employed women workers in India. SEWA members act as hosts to the EDP participants, who are drawn from a range of organisations, including donors, international NGOs, and government departments. The EDPs focus on themes which are of interest both to the participants' organisations and to SEWA. They enable the participants to examine their decisions from the perspective of their hosts and frame policy decisions with a lived experience of the voice, views, and situation of the poor. Commitment to poverty reduction is strengthened as poverty becomes a personal concern. Participants are also able to obtain a practical idea of the impact of various programmes for the poor, and identify policy changes that are needed.

Introduction

The Self Employed Women's Association (SEWA) is an Indian member-based organisation of poor self-employed women workers in the informal economy. SEWA follows the Gandhian philosophy of truth, non-violence, respect for all religions, and the dignity of labour.

Currently, SEWA's membership is 963,000 women workers from the informal economy. These members work in markets,

homes, fields – others' and their own – forests, deserts, and riverbanks. Our members are categorised as:

- home-based workers;
- vendors or hawkers;
- manual labourers and service providers; and
- producers.

Eighty percent of SEWA staff (organisers) are drawn from our membership. These organisers have responsibility for facilitating the management and implementation of various activities and programmes.

At SEWA we believe that to work with the poor, one has to accept voluntary poverty. Unless we understand what it means to be poor, as an organiser it will be difficult to understand the life and working conditions of our members. Being a women's organisation, all our members and organisers are women. At SEWA we have two principles.

- Everyone at SEWA is addressed as '*ben*', meaning sister. It signifies equality and sisterhood among the members.
- The remuneration of all organisers has to be in the ratio of 1:3. No organiser should earn more than three times what members earn. This brings mutual accountability.

Karl Osner, founder of the Association for the Promotion of North-South Dialogue, first introduced Exposure and Dialogue Programmes (EDPs) to SEWA around

1991.¹ EDPs are organised both for other agencies (e.g. NGOs, government, and donors) and for SEWA staff members as a form of capacity building. This article focuses on EDPs for other organisations. EDPs for SEWA staff are discussed further in Shroff, Part I, Section 4.

The design of the EDP

Essentially, EDPs aim to personalise the abstract, disconnected relationship between 'donor' and 'beneficiary' by bringing staff from donor agencies and international NGOs (the participants) into direct contact with their clients (the hosts). This enables the participants to examine their decisions from the perspective of their hosts and frame policy decisions with a lived experience of the voice, views, and situation of the poor. Commitment to poverty reduction is strengthened as poverty becomes a personal concern. Participants may also be government officials. In such cases, EDPs help government officials obtain a practical idea of the impact of various programmes for the poor, and identify policy changes that are needed.

The model of EDP used by SEWA has three phases:

- Exposure
- Reflection
- Dialogue

Exposure is the phase of meeting and getting together with the host and her family. The experience of the participants during their exposure visit determines the content of the two following phases, **reflection** and **dialogue**. The ideal duration of an EDP does not exceed 5 or 6 days, and if needed it can be condensed to 4 days. Normally, the host women are the poorest of the poor so for them to be a host for a longer duration becomes a burden. Also, the houses of these women are very small.

Preparations for the EDP

Before organising an immersion programme, we first have to understand the needs and priorities of the participants and their profiles. We then propose trades/issues that we feel will be of mutual interest to the participating institution and SEWA, and may also contribute to a policy change. After a series of discussions and personal meetings, themes are selected. SEWA's interest in the themes depends on the major issues that its members and committees are experiencing as policy constraints.

For example, in November 2003, SEWA organised an EDP for ten senior officials from the World Bank, KfW, and BMZ.^{2,3}

¹ The Association is now known as the Exposure and Dialogue Programme Association. See Hilgers, this section.

² KfW (Kreditanstalt für Wiederaufbau) means Reconstruction Credit Institute. This is a German development bank owned by the German Government, now known as the KfW Development Bank.

³ Bundesministerium Für Wirtschaftliche Zusammenarbeit (German Federal Ministry for Economic Cooperation and Development).

The participants were engaged in global policy-related agendas at their respective organisations. Areas included poverty reduction, women's empowerment, gender issues, and social development. The EDP theme was finalised through a series of meetings between the World Bank and SEWA. This EDP aimed at deepening policy makers' understanding of the insidious nature of poverty and, as a result, contributing to more effective development policies.

Once the theme is finalised, we identify senior and new organisers who need to be oriented and trained. The team orientation is done by the SEWA Academy, and covers the following topics:⁴

- relevance of the theme to participating organisations' work, current or future, e.g. targeting the poorest of the poor or local governance;
- profile of the participating organisation/institution; and
- profile of the participants.

At the same time, SEWA orients its organisers on the trades chosen. Organisers, in turn, will identify the host women. Care is taken to ensure that hosts represent different trades. Organisers and host women are together given a 3-day orientation on the objectives of the immersion. The host women are also briefed about the EDP methodology, which enables them to decide whether they want to be a host family. The decision is not easy. The responsibilities of the host women are to invite the guests, provide them with meals and sanitation facilities, fetch water for the guests, and allow them to get involved in their work and life. SEWA provides financial and material support to hosts, and assistance from SEWA organisers in preparing for the EDP and throughout the visit. However, if women feel the responsibilities would be too burdensome or overwhelming, we do not cajole or force them. There may also be other reasons for not wanting to host, such as illness in the family, heavy work responsibilities, or timing, e.g. during the peak agricultural season.

Once teams and host families are identified, SEWA district teams simulate an EDP. A team stays at the host's house for 3 days and nights. This gives the women a sense of how it will be to host the guests (participants), and to feel more at ease with them.

The EDP Process

Participant preparation

The EDP process starts with an intensive preparatory stage

⁴ The SEWA Academy is the focal point for all SEWA's capacity building and research efforts. It is the organisational wing responsible for basic membership education and for capacity building, leadership training, communications, and research.



Participants from past EDPs helping the members with their day-to-day activities.



Photos: SEWA

for participants. A handout is distributed to the participants beforehand, which gives an introduction to the host woman, her family, and her work. Practical tips are also included in this handout. Part of the participants' preparation consists of developing an understanding of the situation in which the host women live. Participants also reflect on the process they are about to undergo, feelings they may experience, and the effect they themselves may have on the host family.

Exposure

During the exposure phase of the EDP, participants live for 2 to 3 days with their host, a poor woman who is struggling to overcome poverty. Participants are immersed in the life experience of their hosts and for a short period they take part in their daily tasks and work. The EDP offers participants a window into the worries, needs, achievements, hopes, and fears of the poor. It is an opportunity to learn from their life stories. This glimpse, however brief, provides participants with a more personal understanding of the complexities of poverty, and the vulnerability of the poor.

Reflection

Following the stay with their host, participants return to SEWA headquarters for 2 days of reflection and dialogue (talking about the experience). Participants will often begin personal reflection on their own as it takes time to process their experience before being shared. They try to understand it in the context of their work and identify key themes or words.

Dialogue

Next is the dialogue, which brings together participant, host, organiser, and senior management of SEWA. They discuss the broad implications of participants' experience and suggest

possible avenues of action. The underlying belief is that this cycle of direct experience followed by reflection, questioning, and exchange of ideas better enables participants to evaluate their experience with respect to their policies and development strategies, which in turn leads to change and action.

Experience with EDPs

From the viewpoint of the participants

During the reflection and dialogue phase of the EDP, participants take time to make sense of their experience and relate it to themselves and their work. For instance, participants from the December 2004 EDP hosted by SEWA for IFAD (International Fund for Agriculture Development) and the Government of Gujarat discussed how this experience could help them become more effective and strengthen their interventions in the field.

The EDP can help reduce the distance from the field and provide participants with a way of evaluating how their decisions and actions will help an individual to fight poverty. The question, then, becomes: 'How do my decision and actions improve my host's life, or that of an individual poor person?' As Robert Chambers, a participant in a SEWA-World Bank EDP in 2003, commented:

This was a reality check, and more than a reality check. It has left a lasting frame about what poverty is like and what is happening, against which questions and issues can be tested and which can inform judgement. I think we all need something like this on a regular basis. I do anyway.

EDPs also offer an alternative perspective through which to evaluate development interventions and monitor progress.

By living with a poor family and learning their life story, participants can learn more about what is important to the poor themselves – how they define ill-being, well-being, and progress. EDPs can give participants a ground-level view of how projects and policies impact the poor, and are used and judged by the poor. This can guide them towards new ways of evaluating projects and new measures of progress that are more in line with the priorities of the poor themselves.

EDP alumni periodically return to participate in another EDP, either with the same or a different host. For instance, a participant from a SEWA-World Bank EDP, Praful Patel, stayed with the same host woman a couple of years after his first EDP. This helped him follow the changes in the life of the host woman (see Patel, Section 3).

For other accounts of participants' experiences and learning from SEWA-organised EDPs, see Ravi Kanbur's account in Chapter 11, Section 2 and Gary Fields in Section 3.

From the viewpoint of the host women

For SEWA members the EDP is an opportunity to share their daily life – their routine, their story, challenges, and hopes. In the reflection and dialogue session, members focus on the significance of this opportunity, recounting in detail the activities with which participants helped them, and conversations they had. As Raziaben, an incense stick roller from Bapunagar, commented:

It was an honour to have served my guests. They shared my routine, my life and also heard my story. My children were also inspired by them; they now understood the importance of studying to help them go further in life like my guests.

One of the most significant aspects of the EDP is that outsiders take an interest in their lives and work. As Savitaben, an agricultural labourer from Zanzansar, said, 'They came to see how much we work'. These women are rarely the focus of such attention and typically have limited opportunities to voice their thoughts and be heard. The EDP becomes a unique opportunity for them to express their individuality.

The women's poverty often prevents them from analysing

their situation and life story – where they started from, where they have reached, what they have done to reach this far, and how much further they still wish to go. The EDP is an opportunity for them to review their life, re-examine their conditions, identify needs, and decide on future plans. There is no obligation for the participants to follow up on these needs but SEWA stays in regular contact with the hosts, who are also SEWA members.

The hosts are always selected from the poorest of the poor in their communities, and are often marginalised from those communities. For most of them, the EDP is the first time they have formally hosted guests. EDP guests often lead to other 'guests' and visits from curious members of the community, and in many cases the *sarpanch* (elected head) of the village also visits the home of the host. Seetaben, a salt worker from Degam, has this to share:

When the guests came to my place, the whole village gathered. Even my mother-in-law joined in; you see no one wants to come to a poor household... The whole village came to my house. 'Good' people generally do not come to poor people's houses.

Through the EDP, the host's standing with the rest of the community changes, even if temporarily. She has an opportunity to interact with members of the community with whom normally she would have little or no contact.

Future activities and ways forward

SEWA plans to set up an EDP unit within the organisation. This will have several tasks.

- Increase the number of EDPs run to 3 to 4 per year, each with a maximum of ten participants.
- Assist in replicating the EDP methodology at other NGOs and membership organisations.
- Contribute to courses for external bodies. SEWA has already signed an agreement with the Institute for Social Study, The Hague, to conduct an annual course for their students, and an EDP will be one of the components.

The increased number of EDPs should enable the costs of the unit to be covered.

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5

The World Bank Group: investing in poverty immersions

by **FREDERICK E. NUNES**

Why would a leading public international organisation venture into an immersion programme for its managers? How difficult is it to organise and sustain such a programme? What are some of the challenges of sustaining it? And what lessons might we learn from the experience?

This paper describes the efforts of the World Bank Group in trying to learn through immersion experiences.

Background: the need for change

In 1995, James 'Jim' Wolfensohn became the new president of the World Bank. He sought to learn about the Bank's work by visiting several countries and becoming familiar with its operations. He met many unpleasant surprises but in more than a few cases was impressed with the resourcefulness of the technical and managerial staff.

Within the institution, he was shocked by the stability of the Bank's staff – the very low turnover and the low investment in renewal needed to deepen technical knowledge and strengthen managerial competence.

Jim initiated a drive to rekindle the staff's passion for poverty reduction, open the institution to outside ideas, urge staff to work in partnerships with other development agen-

cies, put more staff in country offices, encourage staff to work with sub-sovereign agencies, and engage with civil society.

One of his major initiatives was the creation of a new executive development programme. This was an expensive venture involving a consortium of institutions. It eventually became known as the Harvard programme. The programme consisted of three 2-week modules spread over about 7 months. To expose the managers to more non-Bank experiences, about a fifth of the participants in each class were managers from other development agencies, private industry, non-governmental organisations, and government departments.

The expectation was that the Bank's managers would learn from the guests and the guests would appreciate the challenges of development that the Bank faced. Sadly, the managers learnt very little from their guests. In one module after another the guests would give the same message: 'Why do you guys talk so much? You seldom invite our views. You never listen to us and you are so intent on stating your own views.'

The Harvard programme catered to the strengths of the Bank's managers. The case-based programme exercised their analytical skills. It played to their desire to put their intellect

on parade. It invited them into debate. And it nurtured their appetite to compete. They enjoyed it immensely. But far from changing their behaviour, it simply reinforced their already considerable skills in advocacy. They listened even less.

Immersion: bridging the gap

One of the organisers of the Harvard programme had recently returned to the Bank and was catching up on Jim's new initiatives. On reading Jim's speeches, it was clear to him that the Harvard programme was not delivering the sort of manager Jim was describing in his speeches. Jim wanted managers who had heart as well as intellect; who cared about 'the smile on the face of a child'; who had a first-hand appreciation of the poverty they were seeking to eliminate and therefore a sense of urgency about the task.

But the Harvard programme was all intellect. The organiser couldn't connect the lofty analysis taking place in the programme and the grim reality of poverty. Feeling this gap, he wrote to his immediate manager, Tariq Hussein, suggesting the need for the participants to spend some time living in a poor community, gaining a completely different appreciation of poverty – not one based on intellect, but one rooted in experience. He thought that his paper would be discussed, the idea refined and thoughtfully explored and, with luck, implemented.

The next morning the manager instructed him to 'do it'. Tariq had had dinner with Jim and described the idea to him, and Jim was ecstatic. When the fellow who wrote the note protested that there was no budget, Tariq insisted: 'Good ideas don't wait around for budgets. Get on with it.'

Before any arrangements were in place, Jim was telling the managers that he was himself going on an immersion and that his wife, Elaine, would be with him. He expected all of them to do it. The immersion would be mandatory and no one would graduate from the Harvard programme unless they had done the 'seventh' week.

Challenges and responses

Few things are certain in the World Bank's culture, but one certainty is that to label anything 'mandatory' is to give it the kiss of death. So even before the programme was formed it faced a huge up-hill challenge.

The programme became known as GRIP – Grass Roots Immersion Programme. Persuading the managers of the merits of the programme was no easy task: 'I come from a poor country. I know what poverty is. What is this romantic nonsense?' Or, as another said, 'This is shameful "poverty tourism". It's sheer voyeurism. We will not fit in. We will be

"The organiser couldn't connect the lofty analysis taking place in the programme and the grim reality of poverty. Feeling this gap, he wrote to his immediate manager, Tariq Hussein, suggesting the need for the participants to spend some time living in a poor community."

a burden. This is a mockery.' And another: 'Look, I grew up in a poor village; I worked very hard to get out of there – and I am not going back!'

These were not pleasant exchanges. But it soon became evident that these reactions were often masking perfectly justifiable concerns about security, health, sanitation, and privacy. They were being asked to step into a world they knew only at a safe distance. Further, some of them had medical conditions that would have made the immersion far too risky.

Perhaps the most difficult message about the immersion to get over was that participants were going there to listen, to observe, and to learn from their hosts. This was almost unfathomable. They were so steeped in their role of development expert and so practised in their skill of being active that the idea of being a quiet observer was a source of acute distress: 'What am I supposed to contribute?' The idea of reflection was alien. We had to steer folk away from going to visit their favourite projects. This was not about projects; it was about people and their survival in poverty.

The organisers themselves had no great knowledge of how to arrange immersion programmes. We had to find contacts in the field. We had to locate trustworthy grass-roots organisations that could manage the logistics, organise safe accommodation, support participants' language needs, provide suitable orientation, ensure an immersion for meaningful learning, and schedule a constructive debrief so participants could reflect on their learning. Groups would have to be small so that each individual would have his or her own experience and not unduly disrupt the host-household. But the participants would need to meet in order to share their learning experiences.

We moved ahead by trial and error. We were attempting to introduce immersions on a global scale but regions are not equally endowed with strong national non-governmental organisations. Nor were all countries open to the idea of poverty immersion programmes; some were very sensi-

“They were so steeped in their role of development expert and so practised in their skill of being active that the idea of being a quiet observer was a source of acute distress: ‘What am I supposed to contribute?’”

tive and were unhappy with Bank staff going deep into the countryside. We consciously aimed at national rather than international NGOs. We found very strong ones in South Asia. Some had organised programmes for parliamentarians and had developed highly sophisticated processes. On our side, we had to be clear about the learning we wanted. Unless we could be clear about our learning outcomes the host NGO could hardly design immersions to meet our needs.

Over time we became clearer about the learning outcomes. We wanted our participants to leave with:

- respect for their host families;
- an appreciation of the importance of listening;
- a recognition of their hosts’ problem-solving skills;
- a clearer appreciation of the integration of poverty and of the futility of single-sector interventions, e.g. roads, education, health, credit;
- a stronger sense of the vulnerability of the poor; and
- an understanding of the potential for disconnections between national policies and poverty reduction.

Head + heart = behaviour change

The GRIP emerged from our recognition of the limitations of our Harvard-based executive management development programme to deliver the behaviour changes we sought in the Bank managers. Much of the detailed work that transformed the idea of immersions into a programme resulted from the hard work of Maury Sterns, a staff trainer who had been a Peace Corps Volunteer.

The GRIP was not the only immersion initiative. When a new Regional Vice-President, Mieko Nishimizu, made a visit to the region she was to lead, she did not limit herself to the cities or government offices. She visited health clinics, schools and agricultural projects in rural communities. On her return to the Bank she was struck by the difficulty she had in sharing her experience with others. This led her to organise other similar visits for teams, including nationals in country offices. These experiences were rich for the variety of participants involved.

One of the challenges in organising immersions is finding the balance between ensuring the participants’ safety and providing an authentic experience. If participants are so well cared for by the host NGO that they merely visit sites, are moved around in air-conditioned vehicles, and return to the safety of the NGO’s facilities, then what we have is more correctly an NGO-immersion as opposed to a village-immersion. This is not an easy call to make. There is also real benefit in NGO-immersion for public international institutions which commonly work with governments. They see how NGOs operate and this is often an eye-popping education in simplicity, practicality, and the use of resources.

As we experimented with different arrangements and searched for partners, we slowly learnt of the silent enthusiastic support both within and outside the organisation. Those with expertise offered their support. Country directors in the field volunteered to find local NGOs. National and international non-governmental organisations provided operational support and academics interested in experiential learning joined our effort. But most important of all, those managers who participated in the programme spoke with their colleagues about the profound impact of their learning during their immersion:

I’ve worked on education for years; but visiting an NGO’s school in a really poor community gave me an entirely different perspective. We have a great deal to learn from them.

I guess my big learning is that the poor are not passive. I saw enormous creativity, a huge capacity for hard work, and commitment to family.

I saw the interdependence between our different sectors in front of me – water, health, education, agriculture, transportation, credit, markets, housing, security – you name it, they all came together.

In a health centre, I watched a mother cuddle a child. I knew the child would die in a few hours. And there was nothing I could do. Child mortality statistics will never be the same to me.

But in a hard-nosed development agency, full of people who see themselves as experts, the real value of a poverty immersion cannot lie in its soft face. The immersion must yield practical business value. It must result in more effective projects and programmes. For this transition to occur, the immersion needs to be more deeply tied to the line busi-

ness. In other words, responsibility for the programme must migrate from human resources (HR) and 'learning' to the regions and 'operations'. That is where the real lasting traction lies and that is where the real challenges have to be faced. Only one regional vice-president, Praful Patel, has taken immersions seriously and tried to move them ahead. He has also included government counterparts in the programmes in his region.

The World Bank Group's commitment to decentralisation calls for more effective interventions at the local level. Its move into more sub-sovereign lending and more direct action at municipal and community levels beg for greater skills in participatory methodologies and in listening to local people. There are compelling reasons for the Bank and other international development agencies to take on the struggle of learning how immersion experiences might enrich and strengthen their effectiveness. The reach for 'results on the ground' is further reason to seek to learn in a different way – from listening carefully to the intended beneficiaries of our efforts.

Lessons learnt

What are some of the lessons that we might identify from our limited experience?

- Seek broad buy-in at the senior management level, especially at the operational level. Do not rely on the enthusiastic response of a single executive.
- Quietly seek out allies. Do not be deterred by the loud noises of resistance. Face the challenges head-on.
- Keep it simple. Do not unduly complicate the preparation for the immersion.
- Organising immersions requires considerable attention to detail. Form a partnership with a colleague who enjoys working on details and who has a temperament for persistence.
- Do not try to develop the expertise of immersion in-house. Find organisations which have a proven track record and work with them.
- Involve country offices as early as possible. Have them help in finding reputable, local NGOs. Have them invite national

“Immersion programmes are not a panacea – but they do offer an in-your-face microcosm of the real challenges of development”

counterparts to share the experience.

- While international NGOs are obviously attractive for global reach, try to find suitable national NGOs wherever possible.
- Seek to move the immersion from an HR 'learning' agenda to an operational 'learning-through-doing' business face.

Looking to the future

The real challenge for the World Bank Group is to move from conducting a few isolated immersion programmes towards institutionalising immersions – to make them stick as a routine feature of development organisations. Unless the Bank Group's senior leadership is convinced that an immersion programme could make a meaningful contribution to its search for greater development effectiveness, there is no future for immersions in the institution. That has simply not yet happened. But it could. The Group has recently endured its most awkward leadership crisis and has to radically transform its image with donor and borrower countries alike. In its new president, Bob Zoellick, the Bank now has an exceptionally well-qualified leader. It needs a new platform of legitimacy and a new sense of authenticity.

The Bank is still searching for an effective process for capturing, using, and sharing its vast global knowledge. It has to learn to operate in a far more decentralised way. It has to learn to foster far more effective partnerships. It has to learn how to knit its several narrow strands of expertise together in designing programmes. And it has to learn to deliver demonstrably positive results on the ground. It must bridge the enormous gap between its operations and the poor people whose lives it seeks to transform. Immersion programmes are not a panacea – but they do offer an in-your-face microcosm of the real challenges of development.

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6

The World Bank's Village Immersion Programme in South Asia

by PRAFUL PATEL, QAZI AZMAT ISA, and CAROLINE VAGNERON

This article describes the experiential learning programmes developed by the World Bank in South Asia. These programmes provide a 'reality check' for World Bank staff and staff from other organisations, including government officials. They also enable participants to understand the impact of policies at local level. World Bank staff in the South Asia Region are now using immersion programmes to monitor the impact of World Bank projects, and the region is planning a further series of immersion programmes for new managers and other staff.

About the Village Immersion Programme (VIP)

The Village Immersion Programme (VIP) is the name used in the South Asia Region for what the rest of the World Bank calls the Grassroots Immersion Programme (GRIP) (see Fred Nunes, this section). The VIP was conceived as an unstructured training programme of 'experiential' learning that put Bank staff in the shoes of their clients, namely the poor of the region, by spending days and nights with them in their villages. The VIP exposes staff to the hardships of life with inadequate health facilities and education, insufficient nutrition, lack of water supply and roads, low agricultural yields, lack of non-farm opportunities, and persistent poverty

despite best efforts.

As well as this 'reality checking', the VIP offers an opportunity to view the impacts of policy at the village level, to see how inclusive or exclusive these are, to understand the political and socio-cultural barriers to inclusion, to see gaps and overlaps in services, and to identify where there is a need for partnerships, integration between sectors, and policy change.

VIP coordinators in the different country offices partner with NGOs to plan and facilitate the programme. They select villages based on levels of poverty and prevailing conditions, and NGOs provide facilitators who stay with participants and act as translators.

Spread of the VIP

The VIP was initiated in Pakistan in 1996, and slowly spread to other South Asian countries, first Bangladesh and Sri Lanka, and then India and Nepal, hosting some 150 Bank staff in one-week village immersions. As well as managers, the programme was also offered to Young Professionals at the Bank.¹ The idea of this was to increase their exposure to

¹The Young Professionals Programme is 'designed to attract outstanding young and motivated individuals from around the world, who have demonstrated a commitment to development, supported by academic success, professional achievement and potential for leadership'. See www.worldbank.org.

village/urban poverty situations in developing countries and to challenge participants to ask themselves how they could utilise their skills and knowledge in the service of the poor, and contribute to reducing poverty.

The VIP was also opened-up to government officials and participants from other organisations. The first such immersion took place in Bangladesh where two government officials and one DfID (UK Department for International Development) staff member joined the programme. One of the government participants was part of a team drafting the Poverty Reduction Strategy Paper (PRSP) for Bangladesh.² During the feedback session he said that he would go back to his office and try to 'convince his colleagues to re-write the PRSP' as, in its present form, it had little relationship with the ground reality he experienced.

Thematic immersion programmes were also introduced to keep up with the demand for better knowledge services. These included programmes focusing on micro-insurance, participatory grassroots mobilisation, and water and sanitation. They were generally aimed at better understanding the poverty impact of development policy lending and similar economy-wide operations.

One interesting point to note is how the immersion approach has been adopted by staff members in the South Asia Region. For instance, immersions have now been used throughout the region to monitor projects such as the Pakistan Poverty Alleviation Fund (PPAF) (see Qazi Azmat Isa's article, Section 4) and the Karnataka (India) Rural Water Supply and Environmental Sanitation Project, for which immersion was chosen as the preferred mechanism for tracking impact on the ground. Immersions have helped Bank staff better understand and document results on the ground, especially with regard to the living conditions of beneficiary populations. Immersions are also still used in sector work and advocacy.

Lessons from the Village Immersion Programme

The programme is critical to:

- gaining first-hand understanding of the impact of, and

“The idea of this was to increase their exposure to village/urban poverty situations in developing countries and to challenge participants to ask themselves how they could utilise their skills and knowledge in the service of the poor, and contribute to reducing poverty.”

- obstacles to, development at the local level; and
- recognising concerns, priorities, and solutions through the realities of the poor, rather than predominantly through the eyes of government intermediaries.

The VIP has also:

- been instrumental in convincing senior officials, both in government and in the World Bank, of the importance and value of social mobilisation;
- contributed to the evolution of the Bank's culture as a whole from an 'expert' approach to a more realistic client-focused attitude, listening to and learning from clients and increasing staff's understanding of the complexities of poverty; and
- given an increased sense of urgency to the Bank's mission of helping reduce global poverty.

The future

The South Asia Region is currently exploring options for conducting the next series of VIPs for new managers and staff. This process is still at the early stages and concerns the South Asia Region only. Plans are to start a new series of immersions over the next few months around World Bank management events in the region. This would offer the advantage of bringing large numbers of managers to South Asia.

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² Poverty Reduction Strategy Papers (PRSP) are prepared by World Bank member countries through a participatory process involving domestic stakeholders as well as external development partners, including the World Bank and International Monetary Fund.

7

Immersions in ActionAid

by **SONYA RUPAREL**

Immersions are a practical and powerful way to experience someone else's life and to make a personal connection with the issues they have to deal with on a daily basis. ActionAid has been organising different kinds of immersions for more than 10 years. In the last 3 years it has been trying to use them in ways that have influence beyond the individual participant. Whilst ActionAid continues to use different models of immersions for different audiences, this article focuses on a multi-country initiative which aims to bring together development decision makers (donors, government officials, NGO staff, academics etc.) to learn directly from poor people. ActionAid sees immersions as one way to influence decision makers in an environment where the rich and powerful are ever more divorced from the daily realities of the poor. This article shares some thoughts on how the impact, influence, and learning from immersions can be scaled up.

Introduction

I found this an exceptional experience that enabled me to think more holistically about poverty and to really appreciate the constraints and vulnerabilities faced by poor people.

ActionAid immersion participant from the UK Depart-

ment for International Development (DfID), China

The external environment in which ActionAid works is changing. We are now seeing development professionals spending less and less time in the 'field' and more time talking with each other and with governments in capital cities, a consequence of the trend towards donor harmonisation and budget support. People from a wider variety of backgrounds are now moving into the development sector, with less experience of poverty on the ground. As a result, development professionals need to work harder than ever to ensure they do not reinforce the gap between rich and poor simply by the way in which the aid system operates.

Within ActionAid, our international secretariat is now led from South Africa. We are committed to rooting ourselves more deeply in the South, and our policy and influencing work is growing. Even so, we are finding that it is not only governments and donors that are at risk of losing their links with communities; international NGOs such as ActionAid face the same challenge.

In this environment we have to keep asking these questions:

- how do development professionals know that the decisions they take will have a positive impact on those living in poverty?

Kate Newman helps with the cooking during an ActionAid immersion in Bangladesh.



Photo: Kate Newman

- how can poor people influence the forces that affect their lives?

ActionAid grapples with these questions in different ways. We believe that immersions can help us explore them in a very direct and powerful way.

Developing an immersion programme in ActionAid

In collaboration with the Institute of Development Studies (IDS), Sussex, UK, we piloted different immersion approaches to develop a model that could help development professionals:

- challenge and test their pre-conceptions (in some cases misconceptions) of how people live in poverty;
- develop new perspectives; and
- strengthen their commitment to poverty eradication.

An ActionAid immersion brings together people committed to eradicating poverty with those who directly experience it. In so doing we make poverty personal. We ask immersion participants to leave their formal roles behind them and to make friends with their host family, building a relationship with the very people who may be affected by the decisions they take. We encourage them to look holistically at poverty, and to recognise that rarely can one 'issue' be divorced from another (e.g. food security from climate change, or from health and education).

The model we have adopted reflects ActionAid's strengths and is consistent with our aim of increasing poor people's influence on decision makers. In developing the model we had to consider six key challenges:

- how to help busy people make time to leave the office;
- how to meet donors' need to see clearly the value of an immersion;
- how to avoid immersions showcasing the work of Action-

Aid or its partners;

- how to tackle the view that immersions are 'development tourism';
- how to make sure that communities own the process and get something out of the experience; and
- how to show the impact of these experiences.

The approach we use is focused on the individual participant and their learning objectives, in such a way that it justifies their time away from the office and has a real impact on their work. We have found that a minimum of 5 days is about the right length of time: any less and the experience would be limited; any more and people might be less willing to take part.

One day is spent discussing objectives, raising fears and concerns, getting to know the immersion context, meeting other participants and interpreters, and exploring relevant issues such as power relationships and roles. The following **3 days** are spent living the way the host families live: working alongside them, cooking with them, eating with them, and getting to know them. Participants often say that they learn a great deal just from being there in the evenings and joining in their hosts' conversations. **The last day** is spent in reflection, discussing what has and has not been learnt, understanding how far objectives have been met, learning from other people's experiences, and talking about what has struck home. Participants are likely to learn a great deal more through this kind of experiential learning than they would in a formal, capital city-based workshop of equal length.

Three key elements of an ActionAid immersion

The approach we have adopted relies on three key factors to ensure that participants can achieve their objectives in a meaningful way.

Trained immersion facilitators

Trained immersion facilitators help participants understand whether their objectives are achievable, how they might meet them, and what they have learnt through the immersion. There are no typical objectives, since these are specific to the individual concerned, but some previous examples include:

- 'to understand the coping mechanisms in this village';
- 'to live with and be part of a rural family for a while'; and
- 'to understand the process of decision-making in this community'.

Immersion is not the solution to understanding poverty, and the facilitator's role is to help participants

DfID staff help to prepare the family meal on an immersion in China.



Photo: ActionAid

understand how far they can apply what they have learnt from one experience, with one family, in one community, and one country to broader development thinking and policy.

We do expect that participants will strengthen their commitment to poverty eradication, and be able to put a real person's face to the discussions they have when they return to their workplaces. We hope that an immersion gives credibility to these discussions, although a fine line must be drawn so that one immersion doesn't set people up as 'experts'. A good facilitator will help work through many of these issues.

Broad participation

Different perspectives can lead to deeper learning. Our ideal is to include representatives from three or four donor agencies, government, other NGOs, academic institutions, and specialist development organisations on the same immersion.

Conversations with host families have raised questions about why foreigners are willing to spend time with ordinary people but not their own government. We have no wish to reinforce views that 'white people bring development'. For this reason we have learnt that it is important to try and include someone from local or national government in the immersion group. However, the power issues involved, and the difficulties facing government officials in leaving their positions behind when they have an ongoing relationship with the community in question (whether direct or indirect), mean that this brings its own challenges. One ActionAid country programme concluded that local authority representatives should not take part in immersions in their home areas.

Good interpretation

The interpreter has enormous power in an immersion. A good interpreter does not only translate conversations between the family and the participant. He or she is also a

cultural guide, and should be sensitive to the participants' needs and put them at ease. We have documented in more detail what we think makes a good interpreter (see Jupp, Section 2). But despite the training programmes we run, success is highly dependent on personality. Finding the right person, with the right language skills, can be difficult.

Lessons learnt

The overall lesson from all the countries which have organised immersions is the value of experience and reflection. More specifically, we have learnt the following.

- **Our approach is informal and flexible.** As a result, each immersion can be radically different from the next. A different group of people bring their different views and ideas to each immersion experience. At the beginning we thought that there would be more uniformity, but experience has shown us that each context is so different that if we tried to impose more standardisation, participants would probably take less away from the experience. Thus it is critical that we learn from each immersion and take time to reflect on what happened. Problems will always arise (a poor interpreter, an unexpected security situation), but we don't regard problems as issues unless we can't manage them. For this we need to be prepared for many different eventualities. However, we do want to be able to provide consistent professional expertise in interpretation, facilitation, and organisation. Further training, practice, and documentation will help address the challenges in each of these areas over time.
- **The post-immersion reflection is critical to success.** The discussion allows different perspectives to be challenged, learning to be enriched, and commitment deepened. It allows each individual to place what they have experienced within the broader context of the group's experience. Diversity of participants enriches learning. We have not succeeded to date in having participants from more than three organisations take part in the same immersion (and only one donor on each occasion). However, as we move the programme forward, we would like to encourage peers from donor agencies and representatives from government ministries or local authorities to participate.
- **Another lesson concerns the word 'immersion'.** Many different experiences in the field are called immersions, from day-long project visits to unstructured visits with no learning agenda. We have often talked about changing the name, or trying to 'own' a definition for an ActionAid immersion, but this is becoming more and more difficult as time goes on and as the word becomes more deeply

Kate Newman and Sonya Ruparel dressed in local clothing with a villager in Bangladesh.



Photo: Kate Newman and Sonya Ruparel

embedded. We are not yet clear whether any misunderstanding about the term will undermine our approach, or whether it really matters – as long as the value of spending time with poor people and learning directly from them is a central part of the experience.

- **We have learnt that the immersion facilitator must be extremely sensitive to the needs of each individual, and allow them sufficient space to express their views and concerns.** The facilitator can make mistakes if they are too intrusive, or not strong enough to lead serious, in-depth reflection, bringing out the real value of the experience for participants. It is easier for those who have been through an immersion to appreciate the power dynamics that we know are part of these experiences.

Institutionalising immersions in ActionAid

Despite our chief executive going on an immersion, our HIV/AIDS team undergoing immersions, and staff in some countries regularly spending nights in communities, we have yet to institutionalise this way of thinking as an organisation ourselves.

There is some resistance to the idea of immersions, not by those who have experienced them, but by those who are reluctant to do so. The usual reason for not participating is: 'I don't have the time.' This usually means: 'I can't, or won't, make this my priority for my time.' We manage to make time for workshops in capital cities and for training courses, but we find it difficult to make time to spend with poor people, building relationships with them, and really listening to the voices that we don't usually hear.

Another reason given for not doing immersions is: 'I come from a village, I don't need to do this.' While it is often the case that staff have such a background, an immersion offers an opportunity for them to stay with different communities

Tom Sharman joins in with the local dance routine in Khosolo, Malawi.



Photo: Tom Sharman

that don't know them, their roles, and their status. Moreover, an immersion can bring a different perspective. One ActionAid programme co-ordinator commented that the immersion he helped facilitate in a village in Ghana, where he had also worked while previously employed with local government, allowed him to see things in ways that he had been unable to do before. Nevertheless, there continues to be some resistance to this view – perhaps inevitably, since it challenges people's belief in what they know.

What's the future for ActionAid and immersions?

One of our successes, in developing this approach jointly with IDS, is encouraging greater interest from donors. Many of their staff now understand and talk about immersions.

Ongoing discussion with donors such as DfID and the Swedish International Development Cooperation Agency (Sida) has led to their participation in ActionAid immersions in some countries, and also their adoption of other models. We had hoped to create greater demand by encouraging donors to see immersions (or similar experiences) as an essential part of the training and induction of key civil servants. We have yet to convince them to see these so holistically, but there are certainly seeds of interest, and we will continue to pursue this as donors increasingly recognise their value.

My belief is that in 2 years' time the demand for immersions might outstrip supply. The practice is spreading in part by word of mouth: those who do them in turn encourage others to do the same. But at the same time the capacity of NGOs to facilitate them is limited, and some donors have very specific requirements (for example in terms of the countries they would like as hosts). I would like to see us explore different ways of doing immersions, using our wealth of experience. I hope that there will be a broader range of participants in future, including those from the private sector. ActionAid also needs to think harder about how we can apply the same learning to places that are less secure and so unable to offer this particular model of immersions. We must always have an eye on the impact that immersions are having, and on whether or not we are achieving our objective of helping change happen through experiential learning. If we find that immersions are not challenging and changing people's attitudes, thinking, and behaviour, then we should stop organising them. I can't see this happening.

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Section 2: Immersion roles

Section 4 will show that there is no single 'model' of immersion, and that different approaches are used by different people and organisations for different purposes. Nevertheless, at the heart of each immersion is the contact that is established between a host family and their guest, which is (sometimes) supported by an interpreter and/or facilitator. The quality of the relationships between these various protagonists is critical to the success of an immersion.

This section explores these roles and relationships. In Chapter 8, **IZZY BIRCH *et al.*** start with the perspective of the hosts, and move on to show how the normal tensions and dynamics within the host community will inevitably surface during an immersion. In Chapters 9 and 10, **DEE JUPP and IZZY BIRCH *et al.*** look at the roles of the facilitator and interpreter – sometimes the same person, sometimes two people – but both of them important bridges between host and guest. Finally, in Chapter 11, **IZZY BIRCH *et al.*** return to the dilemmas experienced in the interaction between host and visitor, some of which are explored further in the closing editorial.

8

Host families

by **IZZY BIRCH** with contributions from **GAURIBEN, RAMILABEN, SHANTABEN, KAMLABEN, AMA GARIBA, SAM MPANGA, and SAURABH KUMAR**

The voices of those who host immersion participants are seldom heard. The visitors leave and write their reports, in an attempt to describe for a wider audience what they felt and learnt, and what the implications might be for development policy or practice. But the thoughts of their hosts rarely leave their villages.

In order to try to redress this imbalance, the Self Employed Women's Association (SEWA) and ActionAid were asked to carry out some interviews with host families to hear what they had to say.¹ The following conversation took place between SEWA staff and a group of four SEWA members:

- **GAURIBEN**, a salt worker from Bharada village in Surendranagar district and a SEWA member for 15 years;
- **RAMILABEN**, a mason from Juna Vadaj, an urban area of Ahmedabad, and a SEWA member for almost 30 years; and
- **SHANTABEN** and **KAMLABEN**, tobacco workers from Mehalav and Rasnol villages in Anand district, and each of them SEWA members for 20 years.

All four had hosted several Exposure and Dialogue Programmes (EDPs), mostly for staff from the World Bank (see Section 1).

What does EDP mean to you?

Shantaben

When I had guests, they worked with me in the tobacco field. Members from my village immediately blamed me, saying that I shouldn't have allowed them: first, they were guests, and second, this job was too dangerous and hard for them. I then explained that the organisation I am a member of organises such visits for outsiders to learn more about poor peoples' lives and struggles, as in my case. Thereafter, everyone started to respect me, even the landlord I work for. They all appreciated that I am a member of a serious and committed organisation.

Kamlaben

EDP is a good way to learn. This is how other people can get to know about the hardships of our lives.

Ramilaben

I also think it is a good learning experience, although not always easy. I still remember one of my guests struggling

¹ A membership organisation of self-employed women, based in India, and one of the foremost organisations hosting immersions – see Section 1.

with broom and dust. He wanted to help me clean the house but the dust was coming back inside instead!

What were you expecting in your first EDP? Were your expectations met? And how do you feel now?

Gauriben

The first time I was worried. I thought, how am I going to manage for their food? I was also anxious about having foreign visitors in my house. But since SEWA facilitators were there to support me, I felt more relaxed and everything went well. Apart from this, I don't have expectations of any other kind, least of all financial!

Shantaben

I was eager to know more about agricultural practices and crops in other countries.

Kamlaben

I wanted to learn about women's lives abroad, but what I discovered is not applicable to my case.

All

Our expectations were met: not only did we manage to satisfy our curiosities, but we also won respect in our villages. We are still eager to learn more as new guests may come from other countries. Our initial fear is over.

Do you have space to learn yourself during an EDP?

Kamlaben

Our learning is somehow limited by the language and the fact that during the day we are too busy to talk. However, at night we can sit together and stay until late. I usually ask my guests about women and their life conditions abroad.

Shantaben

I've discovered more about the Netherlands, of which I was gifted a map from one of my guests.

Kamlaben

Our guests also keep informing us about their lives by writing us letters. I've recently got a wedding card, for example.

Shantaben

I rear cattle, and once my guest and I discussed milk products and how to produce butter and cheese. Another thing

I learnt from my guests is the importance of technology; now I am encouraging my son to study the computer. I find conversations of this kind very interesting, but not all suggestions are feasible in my case.

Ramilaben

My guest and I once discussed the legal status of masons in her country. Of course, our context here is different. Nonetheless, this made me more aware of my rights.

Shantaben

There needs to be more time. Even at night when we have more time to chat with our guests, the whole community is there because they are equally curious. So we never have chance for one-to-one dialogue with our guests.

Kamlaben

I would suggest having two days in which guests share our daily work, and leave only one day for talking at home. There are other phases of the EDP (reflection and dialogue) for interaction with our guests, but these are all group activities. So it is not the same for us. We wouldn't mind losing one day of work as it would be like having training; we don't work but we learn in exchange.

What do you like most in an EDP and what would you like to change, apart from having more time?

All

We are impressed by the fact that strangers may be interested in our lives, and in order to learn more about us they do exactly what we do. They really experience our hard work first hand, and this is the most immediate and effective way to learn about our lives. But we worry about their discomfort.

Shantaben

Some of our jobs are too dangerous and tough for our guests. In such cases they should just observe. Working in the tobacco fields you inhale a lot of dust and nicotine. Once my husband blamed me because I had let my guests work with me and they might have fallen sick. Afraid, I immediately gave them butter milk to prevent any disease. Maybe some form of prevention might be taken, such as wearing masks while in the tobacco fields or gloves when mixing cement. Sometimes, guests' hands are so painful that they can't even help me in cooking!

Ramilaben

I am also worried every time my guests work with me in the construction of buildings. They may fall and get hurt, and there is no insurance for it.

Kamlaben

Where I live, waterlogging is a problem. This made walking so hard for my guest that she had joint pain all day afterwards.

What is the strangest thing you have heard from your guests?

Kamlaben

One of my guests once told me that she had never worked under the sun before.

Shantaben

I had a guest from the USA who was 40 and still not married. She had travelled all the way from the USA to India to take part in the EDP. If I were her mother, I'd never let her go!

Would you like to undergo an immersion yourself?

All

We would definitely like to be guests ourselves, once. If we could choose, we would like to stay with poor people of other countries as well as our previous guests.

Shantaben

Once I went to Bangladesh because of some SEWA meetings and visited some rural villages. There I've learnt that some families are so desperate and exploited by money lenders that they may be forced to sell their daughters. This shocking discovery made me see my village situation in a different light.

Do you have any suggestions for our readers?

Kamlaben

Experiences like EDPs are effective ways of learning and so more organisations should promote and undergo them.

Gauriben

Facilitators and translators should belong to the grassroots organisations hosting these exposures. Otherwise the host-guest dialogue may be mistranslated or altered.

Shantaben

It would be a good idea to have in-country EDPs too. I mean Indians meeting other Indians. Being within the same country, the exchange of experience may be more useful and applicable to local contexts. For instance, I visited Madhya Pradesh and it turned out to be very informative for me.

Gauriben

Getting people together is crucial when you want to 'build' something. It is like clapping. You can only do it by using both hands!

Ama Gariba's reflections

Ama Gariba hosted one of the participants in an ActionAid-facilitated immersion in Funsu, Ghana, in June 2005 (see Section 3). She talked with Kweku Koranteng, programme manager for ActionAid's Upper West Regional Development Programme, about what she thought of the experience.

The immersion gave me an opportunity to learn new things. I remember particularly those things about the upkeep of children and women's way of life which appeared to be a major concern for my guest. She discussed with me issues about my parents, sisters, and brothers. She advised me on the need to be patient, as a group leader, in the management of issues concerning our group, my siblings, and my husband. She gave me a feeling that the common things we face as women are similar or even worse elsewhere. These talks gave me hope and made me feel that I am not alone. Somehow I trusted her and took her advice very seriously and, believe me, this patience has yielded great personal dividends.

For example, I was able to hold our struggling group together in spite of the many difficulties which were threatening to break us up, because I was prepared for this happening after talking to my guest. The result was the selection of our group as the Regional Best Soyabean Production Group on the occasion of the Regional Farmers' Day Award of 2006. Women here are the same as those elsewhere, but being conscious of what may be coming in such a group situation and being prepared is something the others probably have not experienced.

My biggest disappointment about the immersion was that you did not bring another batch to Funsu in subsequent years. As married women we scarcely get the opportunity to interact with people beyond our family on general matters for that length of time, let alone

people from outside our country. We were getting more confident about the programme and looking forward to more of these kinds of opportunities presented in the way the immersion was done. For us, when somebody genuinely subjects herself to sharing your life in the way my guest did, you feel humbled and challenged to give of your best, as well as motivated to learn from her experiences.

I think you must allow us to write directly to our guest for advice and to share some of the good things that they have helped us achieve. We would not all be disturbing them with silly requests as you fear. Tell my guest I am very grateful that she came and look forward to seeing her once again.

Sam Mpanga's reflections

Sam Mpanga, who hosted a visitor during an ActionAid-facilitated immersion in Uganda, commented:

We did not know exactly how it would turn out, but it turned out well. Equating immersions to 'hosting a visitor' made the idea simple and easy for us to understand. We prepared to receive our visitor knowing very well that in the African context a visitor is only a visitor for one night, and the following day is expected to blend in the family and share in the duties.

We learnt a lot from the visitors. I had the opportunity to ask my visitor any question that came to my mind, especially business questions, since this turned out to be our common area of interest. The visitors quickly seemed like part of us. They adjusted to our lifestyle, understood the challenges that surround us, and were interested in knowing more about us. Before, we were suspicious that these people were coming to spy on us or laugh at us. We could not imagine that they simply wanted to learn from us.

The relationship between host and visitor can be enormously positive, as these extracts suggest. However, the environment within which these encounters take place can be far from superficial or cosy. The normal under-currents of tension and conflict that characterise every society may well surface; visitors and their interpreters must be prepared to deal with and try to understand them.

Saurabh Kumar's reflections

Saurabh Kumar, who acted as interpreter/facilitator for an ActionAid immersion in Mandsaur district, Madhya Pradesh, writes of a host village where the sex trade was the main means of livelihood and prostitution rampant.

There are some experiences which leave a lasting impact on our lives. This immersion programme was designed to provide first-hand experience of the sufferings and struggles of the Bachra community. They are stigmatised as traditional prostitutes, though I later learnt that they were forced into the world's oldest profession only a few generations back.

The conditions prevailing in the village were evident as soon as we stepped inside. We were offered young girls between 10 and 20 years of age by pimps, and were hurled with abuse when we declined. When we tried to talk with a young prostitute, her parents abused our host for bringing such nuisances into the village. Parents force their daughters into the sex trade in order to meet day-to-day expenses and the dowry for their sons' weddings. Although I am a rural development professional, I learnt about a different dimension of poverty here. Others suffer hunger and poverty, but the Bachra girls suffer humiliation and disgrace leading to their social stigmatisation. They cried before us narrating their tales, while their concerned parents waited outside and abused us.

On the second day of our stay we encountered a policeman who came to the village in order to extract bribes from the customers who frequented it. On seeing unknown faces he rushed towards us and started enquiring about the purpose of our visit. He started abusing us and even showed us the cane he was carrying. Many people assembled around us: those who were against the sex trade spoke in our favour, while those who had pushed their daughters into the trade chose not to recognise us, even though they had spent most of their time with us over the previous two days. When the policeman found out that we were from ActionAid and not scared of him he changed his tone. But in order to create an impression on the villagers he instructed us to report at the police station the following morning. We did, and reported him, and he was thereafter instructed not to enter the village again.

An anonymous reflection

Another example comes from an immersion in Africa, where one of the visitors witnessed the reality of gender violence. It also illustrates the dilemmas that can face outsiders in deciding whether or not to intervene:

On the last evening of our stay, my interpreter and I were walking through the village when an elderly woman called out to us from over a compound wall. Inside the compound we found a young woman, crouching down beside the wall

of a house, hiding so that she could not be seen by any passers by.

She had sought refuge in the home of this elderly relative because she was being hunted by a man who wanted to marry her, and was visiting all the houses with a group of male kinsmen. The girl explained that she had been working in the town for some time and had recently returned to the village to see her family. One day she had gone to visit a married sister in another village and was there kidnapped by a young man whom she had not previously known, and who held her captive in his compound. As is the custom, he refused to release her until her parents sent for her.

The parents first sent her brother, but the kidnapper would not let her go. Only when the mother went did he release her to go home. The next day he and his relatives came to her home village bringing gifts and cash to make an offer of marriage to the girl's father, who accepted. Distraught, the girl ran away to hide on the other side of the village. She said that she did not want to marry, and was planning to study sewing in the town so that she could earn her own living. She was waiting for a few days to pass in the

hope that the men would go away and she could then sneak onto a bus or lorry passing in the night and leave the village. Her worry was that if she were seen trying to escape, they would drag her off the bus.

It occurred to me that as we were leaving the next day, we could pick her up in one of our vehicles directly from the compound where she was hiding and take her with us to the town. My interpreter, shocked by the story, initially thought this a good idea, but on further reflection pointed out that were we to do this, then the local partner organisation which had arranged the immersion could be blamed by the community for interfering with a parental decision. There seemed no time or space for us to meet collectively to discuss this. So, we didn't help and I do not know whether she managed to get away or was violently forced into a marriage against her will – something which I understand has now been made illegal in this country.

In these kinds of situations the immersion facilitator or interpreter can use their local knowledge to help decide the best course of action. Their role as intermediary between host and visitor is discussed in the next sections.

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9

Not your usual facilitator...

by DEE JUPP

Some immersions use no facilitator. This is particularly the case when they are an integral part of programme development or monitoring (see Haider Yacub/Saiful Islam and Qazi Asmat Isa, Section 4), or when they are self-organised (John Samuel, Section 3). Or a facilitator is needed to help bridge the worlds of the hosts and the visitors – in Karl Osner's words, to help 'smooth the communication' between the two.

Sometimes the facilitator also acts as interpreter; this practice is followed by SEWA. Another approach, used by ActionAid, gives the facilitator a role that is distinct from that of the interpreters. S/he provides practical and emotional support to the visitors, working with individuals to reflect on their experiences and draw out its implications.

DEE JUPP explores this particular form of facilitation in the following article. She compares participatory approaches facilitators, whose work with groups to enable intra-group engagement requires them to adopt particular attitudes and behaviours, and immersion facilitators, who work with immersion participants to help those participants adopt appropriate attitudes and behaviours for a quality immersion experience.

Not your usual facilitator...

Immersions aim to provide an individual with an experience of poverty by sharing the day-to-day life of a host family. ActionAid promotes the concept of 'facilitated immersions' where a facilitator provides practical and emotional support to immersion participants. This is quite different from a participatory approaches (PA) facilitator. But yet, when ActionAid in 2006 asked more than eight countries for candidates to train as facilitators to support immersions, all those put forward had excellent PA facilitation backgrounds but were not necessarily what was required to support immersions. All facilitators of immersions should be PA facilitators – but not all PA facilitators can be facilitators of immersions!

We deliberated at length to find a better term than 'facilitator' to describe the role we envisaged. 'Mentor', 'counsellor', 'guide', 'adviser', 'motivator' were among many (sometimes quite exotic!) terms we toyed with, but all had particular connotations with which we were not entirely comfortable. A facilitator for immersions is all of these and more. We finally settled on 'immersion facilitator' in order to make the very important distinction from a PA facilitator.

So what is the difference? And why does it matter?

The difference stems essentially from the fundamental differ-

ences between participatory approaches and immersions. Some of these are discussed below in the context of the different facilitator roles required.

Purpose

Generally, participatory approaches are used with the intention of reaching a result; a village plan, a self evaluation, a joint analysis and problem solving, consensus, transfer of knowledge or technology. The PA facilitator encourages full participation, promotes mutual understanding, and cultivates shared responsibility towards this end.

The quality of the outcome is due in part to the quality of the facilitation process. By contrast, immersions are experiential in nature and outcomes are personal, specific to individuals undergoing the immersion and, often, less tangible. Unlike other participatory approaches, they are driven by the individual's own agenda, not by the shared agenda of a group. The immersion facilitator is responsible for ensuring that the immersion experience results in learning and enhanced understanding of poverty for each immersion participant, by helping them understand the immersion concept, 'let go' of their professional roles and biases, and live as far as possible the life of their hosts. The purpose is to help the immersion participant see things differently. There is no obligation to take subsequent action together with others.

The purpose and, to some extent, the process of participatory approaches can usually be defined in advance (in a schedule or process/workshop flow diagram). The immersion process and outcome, on the other hand, is unpredictable. In fact, the immersion facilitator actively encourages the immersion participant to be open to the unexpected. What an immersion participant feels and thinks after an immersion may be very different from what they expected before it!

Process

PA facilitators use a range of techniques to tease out participants' different perspectives. The skilled PA facilitator uses visual and other interactive methods to enable participation – even where there are divergent views and differences in power. An immersion is all about the experience of the individual undergoing the immersion. The immersion facilitator does not facilitate group processes (except in the pre-briefing and post-immersion reflection) but rather works one-on-one with immersion participants to help them achieve their personal objectives.

In participatory approaches, emphasis is usually placed on triangulation, which is essential in managing diverse perspectives and multiple sources of information. The objective of an

immersion is not to uncover facts or to get a full picture of a situation, but rather to 'go with the flow' and learn as the experience unfolds. Immersion participants are essentially experiencing the life of one family at one point in time. It is not, in any way, representative.

Status, identity, and attitudes

In participatory approaches, the PA facilitator recognises the unequal status of stakeholders and uses their skills to manage this. At best they will enable some kind of equalising dynamic, but there is no intention to change the status and identity of individuals. By contrast, the immersion deliberately intends to play down the status of immersion participants, enabling them to live, as far as possible, as their hosts live. This includes not assuming guest or preferential status, joining in household tasks, dressing simply, eating and drinking with the family, not using resources which confer status (mobile phones, radios, cameras, sunglasses), walking rather than driving, and not being choosy about activities, facilities, or food.

Empathy

Although respect and a non-judgmental style are essential to facilitating participatory approaches, the PA facilitator is not obliged to feel empathy with participants or encourage them to empathise with each other. While some PRA practitioners try out new tasks (e.g. winnowing, collecting water, weaving, roof mending, farming) this is generally a means to build rapport, 'break the ice', and bring people closer together. Since 'putting a face to poverty' is at the heart of immersions, immersion participants take part in household and community activities wholeheartedly as a way to experience and understand other people's lives. Through this more intensive and less tokenistic engagement, participants discover for themselves how heavy the water is to carry, how back-breaking the weeding is, and how difficult it is to bathe in the river.

Emotions

In my experience, in several countries with a range of participants from field-level workers to government ministers, it is not an exaggeration to say that immersions may be transformational. Immersion participants may question their long-held beliefs about development, feel inadequate, overwhelmed, and challenged by stepping out of their comfort zones. Throughout the immersion, the immersion facilitator is on hand (but not intrusively) to support immersion participants by listening to their concerns, insights, and reflections, and providing advice or linking them with their peers for support, ever-mindful that an immersion experience

Table 1: Roles, knowledge, and skills of PA and immersion facilitators

Participatory Approaches facilitator	Immersion facilitator
Works with groups and is concerned with managing group dynamics.	Primary concern is the immersion participant and the relationships they build with the host family, interpreter, fellow participants, and host community.
Has expert knowledge and skills in a variety of participatory approaches, which they use to maximise participation and interaction in groups.	Has knowledge and skills in participatory approaches to pass on to immersion participants as alternative ways to engage in conversations with their hosts. Uses these approaches in briefing and de-briefing session with immersion participants.
May use games, icebreakers, rapport-building techniques to create a fun environment for openness and trust as well as to reduce power distance in groups working together.	Encourages the immersion participant to integrate as much as possible in the life of the host household and community, albeit for a short time. Activities are engaged in seriously. Must have experienced an immersion themselves at some point.
Need not have broad understanding of development work. Some tailoring of approaches to stakeholder mix is required, but the facilitator does not need to have had exposure to the different organisational and national cultures represented in the group. Facilitation skills and managing group dynamics are paramount. Remaining 'content neutral' is usually key to good facilitation.	In order to understand the context of an immersion and to provide meaningful mentoring for development professionals undergoing an immersion experience, the facilitator must have a broad understanding of development. May have to challenge professional biases. Should have experience of working with people from government, aid agencies, NGOs, and a good appreciation of different organisational cultures as well as participants' own cultural backgrounds.
Excellent communication and interpersonal skills.	Excellent communication and interpersonal skills but also the ability to relate to immersion participants as mentor, counsellor, friend, motivator, and supporter.

can have a profound emotional impact and can be physically challenging.

While both types of facilitator may share the same orientation to poverty and development, and may emphasise the importance of participatory approaches in embracing multiple realities, respecting everyone and promoting small voices, the role they play and concomitant profile is quite different (Table 1).

One cannot assume that a PA facilitator has the right background to be an immersion facilitator. For example, they may:

- 'push' accepted participatory approaches (e.g. promoting the use of PRA by the participant);
- under-value the importance of the participant immersing wholeheartedly in the household;
- not understand the special power dynamics of the partici-

pant/host relationship;

- favour group experience sharing over individual reflection and personal learning (particularly in introduction and post-immersion reflection sessions); and,
- as many (rightly) rely on energisers and games to motivate groups, may use fun and humour inappropriately in interactions with the participant, hosts, and host communities.

An immersion facilitator is required to ensure that immersions are valuable learning experiences for immersion participants. The prime role of PA facilitators is to enable interaction and participation of all in productive engagement. Our experience indicates that immersion facilitators are best selected from counselling/mentoring backgrounds rather than training/facilitation backgrounds.

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10

Interpreters

by **IZZY BIRCH** with contributions from **KATY OSWALD, HAWA AWURO SAM, and SONYA RUPAREL**

The interpreter in an immersion does far more than translate between different languages. Their role is to interpret not only what is being said but also the cultural dynamics that influence the interaction between host and visitor. They may advise the visitor on how to behave, and help the host understand the world from which their visitor has come.

Interpreters are in a position of considerable power, which makes their selection and training critical to the success of the immersion. Their personal attributes and values – such as their ability to empathise with both host and visitor and to keep their personal views or feelings to themselves – can be as important as their technical skills. Bosse Kramsjo (Section 4) identifies the availability of good interpreters as a key challenge. Well-educated, city-born interpreters ‘can carry with them “bags” full of contempt or disregard towards the villagers,’ he writes. The guidelines for facilitators prepared by the Exposure and Dialogue Programme highlight the importance of their role and the need for discretion:

You are there but you are not there. You should be the mirror through which the host and the guests look at each other.¹

¹ EDP (2002) *Guidelines for Facilitators of Exposure and Dialogue Programmes*. Bonn: Exposure and Dialogue Programme.

Katy Oswald's reflections

Interpreters are sometimes closely associated with the organisation arranging the immersion, and can be highly experienced development workers in their own right. In the case of an immersion organised for DfID staff (UK Department for International Development) by ActionAid China in 2006, the interpreter was a Party secretary from local government. **Katy Oswald**, one of the participants in that immersion, described the impact of the experience on him:

One of the most interesting aspects of this immersion from my perspective was the experience of a local county Party secretary, who accompanied me as translator. He said that he had learnt lessons from my 'bottom up' attitude and was impressed by my wanting to experience life in the village (such as insisting on walking to a neighbouring village when he offered his official car). He also said that he was more aware of the problems facing the villagers. One of the recommendations I made to ActionAid China was to offer local government officials the opportunity to attend immersion visits as it seemed that he had gained as much from the visit as I had.

Hawa Awuro Sam's reflections

In other instances an interpreter may be a young college-

leaver at the start of their career, who has had the requisite training in an international language. In such cases the experience can also be an opportunity for them to learn, as Hawa Awuro Sam, a development studies student from Ghana, describes:

For me, I understood better and gained practical experience especially on the art of listening and hearing, which I had read about. As I went round with my visitor, I realised that she was trying hard to come down to our level by genuinely listening and accepting to be part of anything offered. Even though I knew that in her position she must have had some of these experiences – and if I were in her shoes I would have said so – it was like she wanted to feel or taste it again for the sake of the process. She rarely cut into a talk when her hosts were speaking, and only asked me to tell her what they said afterwards.

When asked what advice they would give to others, interpreters trained by ActionAid in various countries mentioned the importance of patience, humility, honesty (for example, translating what is actually said rather than what the interpreter thinks should be said), good listening skills, stamina, and a deep understanding of their environment.

Sonya Ruparel's reflections

The following account, written by Sonya Ruparel of ActionAid, shows what can go wrong when these qualities are absent, and how the behaviour of the interpreter can make or break an immersion. Far from offering themselves as a mirror, the interpreter in this instance created a wall between the host family and their guest.

This is a real account of how an immersion can be undermined if you do not have a good interpreter, and how one's own behaviour can inhibit learning. The interpreter allocated to me was employed by a partner organisation which worked in the community that was hosting the immersion. She therefore already had a certain 'status' because of her job, and was known by people in the village.

I found that the flow of the conversation was difficult to maintain. It was inhibited by my interpreter asking her own questions of both me and my host, and choosing to explain to me what it meant for the family to have me to stay. She did not translate all my questions, but rather responded to them herself.

My hosts let my interpreter lead me around. I asked them if I could help with the cooking, but this ended up

“Even though I knew that in her position she must have had some of these experiences – and if I were in her shoes I would have said so – it was like she wanted to feel or taste it again for the sake of the process.”

with my interpreter taking over and telling me what to do. After a while, when I wanted something interpreted, I had to say: 'please could you translate that' at the end of the sentence. At one point I asked my interpreter not to answer on my host's behalf but simply to translate, and this clearly upset her.

The help that I gave the family started to look very tokenistic. I helped with the cooking, but would get on with a non-essential task while my host went off and did something else leaving me to my interpreter.

Another regret I have is taking my camera. In the past this has not been a problem, but my interpreter decided that as long as I had a photograph of me 'doing something' I need not continue doing it. She made people pose for the camera. This made me feel quite uncomfortable, but I felt that I couldn't stop her once she had organised something with other people as it would look churlish. I did say at one point that I preferred not to have posed snaps, but this still didn't restrain her.

After we had cooked breakfast my host mother wanted to show me the fields. We walked there at a fast pace, with my attempts at conversation continually thwarted by not being translated and the interpreter unable to keep up. On the way to the field she received a phone call which meant that she walked 20 paces behind us talking on her mobile. There was no way that I could make conversation.

We all did about an hour and a half's work, pulling weeds out of the groundnut field. My back started to ache within about 15 minutes, and I asked my host if her back hurt. She admitted that it hurt all the time but that she was used to it. We carried firewood back from the field to her house, and I am not sure what happened to her after this. My interpreter also disappeared somewhere. This was a regular occurrence: I later learnt that she went off to listen to some meetings that her organisation was running in the village. I talked with some children who had a reasonable level of English. My in-

terpreter came and found me, and interrupted my conversation, asking the children questions of her own. She asked what they wanted to be when they grew up. After a short while she turned to me and told me that she had just told the girls never to listen to the boys as they are all liars! She then asked me if I had anything to add. I was very shocked and disagreed with her, and asked her to say that I believed that both boys and girls should learn to respect each other and treat each other equally. As far as I know this was translated, and then she told me that what I had said had created trouble between the boys and girls. Once again, I am unsure of the translation and how I was interpreted.

Later on I asked the eldest daughter of the house if she minded if I accompanied her to the clinic. Once again my interpreter used this visit to reinforce power issues by insisting that we walk to the front of the queue and that my host should be given her medication immediately. This was extremely embarrassing, but by this point I had stopped trying to say anything to my interpreter as I was aware that I only had a few more hours left of the immersion.

Overall, this was a frustrating experience, caused by my own inhibitions and by an overpowering 'interpreter' who did not fully understand either her or my role in the immersion.

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11

Reflections by participants on the interaction with their hosts

by **IZZY BIRCH** with contributions from **KATY OSWALD, ARJAN DE HAAN, EDWARD BRESNYAN, and RAVI KANBUR**

The mutual benefits experienced by both hosts and visitors are evident in some of the earlier testimonies. But despite the appreciation expressed by the hosts, it is highly likely that the guests gain most. Apart from the practical pressures placed on poor families looking after visitors from unfamiliar cultures, it is the guests who sought out the encounter, who experience novelty and stimulation, and who leave with new ideas and perspectives that will enhance their personal and professional lives.

Katy Oswald's reflections

Katy Oswald, a Social Development Advisor with DfID (UK Department for International Development) in China, describes how her stay in a rural village increased her confidence to talk about rural poverty and renewed her sense of mission and purpose:

Project monitoring missions are always so rushed and formal. You rarely get to see daily life in villages or spend a lot of time talking with people. The immersion gave me an opportunity to do both.

I spent three nights living with a family in Qi Zhi village. The experience confirmed much of what I've read about

rural China. For example, whilst I knew that gender inequality in China still existed, living in Beijing it is easy to make the false assumption that things are improving. Another observation that confirmed a growing body of research was that internal migration has had a huge impact on rural China. Most residents of Qi Zhi village between the ages of 17 and 40 are migrant workers outside the village. This accounts for almost half the population. This 'missing' generation means that the burden of agricultural work falls on the young and old, and it really made me consider the consequences of a whole generation being brought up by their grandparents. Again, despite knowing the statistics that tell this story, I hadn't fully appreciated the implications for rural China, in particular on the older generation left behind.

Living in Beijing, I lead a pretty pampered life, and the immersion was certainly a reminder of why I wanted to work in DfID in the first place, to alleviate poverty and all the hardships associated with it. In terms of contributing to my daily work here in DfID China, I think it has given me the confidence to talk about poverty in rural China with some personal authority. You often come up against people who are ignorant of the level of poverty that still exists in rural China and now, as well as

referring to the statistics, I can refer to my own personal experience.

Arjan de Haan's reflections

While most immersion participants experience similar benefits, their accounts also explore the dilemmas and delicacies in the relationship between guest and host. Arjan de Haan, a DfID staff member and visiting professor at the University of Guelph, who took part in a SEWA EDP organised in Gujarat in 2005, comments on how instructive yet small is the glimpse offered into another's life. He says that grand claims for immersions helping outsiders understand 'the reality' of other people's lives should be treated with caution:

I believe that it is important to continue to emphasise how small the glimpse – no doubt biased by the nature of our visit – is that one observes through such a visit, and would observe even if it was 2 or 3 days longer... the visitor's view of reality is determined by particular circumstances, and chance. I also found one of the comments by SEWA participants during the feedback session very instructive: they found the visitors' repeated questions regarding the 'key event' in the history of the organisation and the lessons learnt from that very difficult to answer, suggesting that the complexity and diversity of experiences cannot easily be captured in a short space of time. Therefore, it may be important to keep the programme of dialogue and exposure as flexible and informal as possible: while it is good – and extremely helpful for us – to organise the visit well, for me the key value lies in the opportunity to spend an extended amount of time with a few people that we do not associate with on a daily basis, not to understand 'the reality' of 'poor people', but to hear some life stories, in a way in which they prefer to narrate them to outsiders like us.

Edward Bresnyan's reflections

Edward Bresnyan, a World Bank participant in the same EDP, expresses discomfort with the process through which private conversations with his host become public, suggesting that the mutual understanding generated through cross-cultural contact is value and justification enough:

... I think one issue must first be discussed, that being the conflict I sense between i) the intimacy of the conversations we had with her, and ii) their public disclosure after-the-fact as part of the overall EDP.

This I find to be one of the particularly uncomfortable aspects of the EDP, since it seems to predispose us (i.e. the visitors) to share publicly what was learnt privately, in the home of our host and her family. To put it bluntly, this seems to vulgarise – in the true sense of the word – the potentially intensely personal nature of the sharing that occurs when individuals make the choice to get to know each other – despite language, social, cultural, and economic barriers thrown in their midst. This I see as a central paradox of the EDP (at least as it is now designed), in that while one is making new friends, forging relationships, and asking probing and intimate questions about someone's (i.e. guest's) personal struggle to survive and prosper, there also exists an onus to 'report back' and otherwise assess the experience for the rest of the EDP participants.

It seems we need to keep in mind that, while we are indeed taking part in this cross-cultural exchange, the instrument of our own learning is in fact the life of another human being, who has offered herself as an instrument of instruction. In short, that which is gained through private conversation should remain as such. There is obviously a limit to the intimacy of such conversation when it takes place among one host, two EDP participants, and their two facilitators/translators. Yet perhaps when we open up to each other, letting our cultural guards down and allowing ourselves to truly get a glimpse of the other's life, the mutual understanding that this creates among us is actually the best payoff, and something that, if truly to be valued, should be kept among us alone.

I don't think I want to go to that temple any more

Finally, **Ravi Kanbur** describes an instance in which he misunderstood his hosts' reluctance to accede to a particular request. The power of the story lies in two things. First, the author's willingness to lay bare his own misreading of the situation and the grace with which he reacted once he understood. Second, the way in which an apparently small encounter – a brief glimpse into lives lived in parallel by others – can affirm what we know, rooting that knowledge in a particular place and time, and associating it long after in our memories with a particular face and name.

I of course consider myself to be an old hand at all this. EDP, I've done it before. Our host lady Ramilaben lives in Ganeshpura. I've been there before. We are being exposed to her role as a member of the Executive Committee of the Vanlaxmi Cooperative in Ganeshpura. I've visited them before. Three times, I think. On two of the past visits I have

tried to get into an inviting looking temple at the entrance to Ganeshpura, but always found the iron gates locked.

Ramilaben's house is just along from the temple, it turns out, in a clutch of houses belonging to the Senma community. Joe Devine (my EDP companion) and I arrive and sit down for the customary greetings and talk at Ramilaben's house. We are accompanied by two formidable SEWA workers: Labuben and Indhiraben, and a SEWA trainee, Manjriben (SEWA uses these EDPs to give exposure to its new recruits).

As the pleasantries get going I ask about the temple and whether I could visit it (last time I came it was with my wife, I say, and it would be nice to tell her that I managed to visit the temple we both saw from the outside). Ramilaben and her husband look at each other. He says we can try and go to it later. But later never comes. The programme is busy.

The next day I ask again about the temple. Later. But later never comes. The programme is busy, and enjoyable. As we finish dinner with the family, this time I ask Ramilaben's husband, as he is leading me out to the toilet facilities. He says 'yes, the temple is open now.' Oh good, I think, we can go there on the way back. But he is still talking and what he

says stops my heart. So obvious, so stupid of me not to realise: me, with all my exposures, and all my dialogues and all my reading. And my three visits to Ganeshpura. The temple is not open to him, to Ramilaben, the Senmas or any of the lower castes. But, he says, I am sure you can go there, no problem. I'll speak to them if you like. They'll let you in, but I can't go in. That's OK, I say, we'll do it another time, lets get back to Labuben, Indhiraben, and the others in the house.

SEWA itself is an oasis where caste is seen as an obstacle to be overcome actively and purposively. The Gandhian prayers with which each SEWA meeting starts assert this. On previous exposures I have seen the effects in Hindu-Moslem cooperation within SEWA. But SEWA lives in the real village world. The realities of caste are seared into my mind this time. That is also what exposure does. Through small incidents and large, these small and seemingly superficial visits affix the knowledge that we all acquire through books and reports, affix it firmly by putting a face and a place to it.

I tell my wife about the temple we both saw at the entrance to Ganeshpura. I say to her, 'I don't think I want to go to that temple any more.'

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NOTE

Ravi Kanbur's is an extract from a longer report, written after an EDP with SEWA in January 2005. The full version is available from the author

Section 3: Personal accounts

This section is a collection of individual testimonies written by some of those who have taken part in immersions. By their very nature these are highly personal and subjective accounts. The authors record what mattered to them at the time. The act of writing is part of the process of reflection, which is so central to every immersion. The tone of the pieces and the choice of language reflect the intensity of the experience. All of them illustrate the power of face-to-face dialogue and the potential of immersions to challenge deeply held beliefs.

12

Extract from immersion report: Fungsi, Ghana

by KOY THOMSON

This article is the first of three written by participants in the same immersion in Ghana in 2005, facilitated by ActionAid International and its local partner, Tudridep. The immersion took place in a village called Fungsi, in the Upper West region of the country. This was a pivotal immersion for ActionAid in that it cemented the organisation's thinking about the particular model of immersion it would pursue (which Sonya Ruparel described earlier in Section 1).

The author describes the vulnerability he felt during the immersion, and the uncertainty of his status – echoing what Dee Jupp wrote in Section 2 about how downplaying the status and identity of guests is an important part of enabling them to come closer to their hosts. He shows how his time in Fungsi both challenged and reinforced his thinking about rights-based approaches and advocacy.¹

As I write, I imagine Uhuru is in the bush, on his farm. Pacing between the yam mounds and corn ridges. I hope they are fat with produce. I hope the partridges have not scratched up the maize seeds, and that Uhuru is fit and free from snakebites and scorpion stings. Uhuru and his brother Alan-hansa once asked me to resolve their long-running argument about whether the world rotates. I tried to explain as best I could with the aid of a lantern, my fist, and a great deal of bluff. But beneath a brilliant canopy of stars and planets, the conversation soon veered off onto other astronomical matters. Uhuru's curiosity and wonder at the world, the burden of his extended family's survival, and the occasional glimpses of youthful behaviour (gratuitously and accurately catapulting the goats) reminded me of what a vulnerable young man he is, and I wanted to get to know him more.

'I suppose it is nice to have the luxury of 4 days in a village doing nothing.' This was one (not untypical) response to my immersion in Fungsi. For a development organisation to see 4 days simply being with people living with poverty as a luxury is a sign of pathology. Being busy, doing things, never deviating from the 'plan', creates a self-referential universe which organisations need never leave. It is OK to draw the village into that universe by doing something useful, perhaps a review or an investigation, something

¹ A rights-based approach to poverty reduction is based on the belief that poverty is a consequence of the denial and violation of human rights. Every human being has a set of rights which their governments are obliged to promote and protect. A rights-based approach involves empowering people to claim the rights to which they are entitled under international and national human rights law.

Photo: Koy Thomson



Koy sorting cards of participant's expectations.

A family prepares the evening meal.



Photo: ActionAid

professional or expert – but God forbid, doing nothing!

Let me celebrate doing nothing. But first let me qualify that. My teenage son does loads of doing nothing and I am not celebrating that. I am talking about doing nothing in order to unlearn. Why unlearn? Because unlearning is a state of mind that encourages critical thinking and openness. Because to unlearn, you have to drop your professional defences, the position of power you have over other people by virtue of your money, knowledge, experience, and status, and become vulnerable. Only then can you experience how the business of reviews, investigations, and enquiries is a thick plate of defensive glass that encloses you in what is known, and prevents you from experiencing... perhaps, something else.

As I write this I am listening to Studs Terkel, the great journalist and documenter of 'uncelebrated people's' lives, who says too that to be able to listen to people it is important to be vulnerable in that relationship, ideally to place yourself in a position of inferiority. In an immersion, with your uncertain status (no-one really knows what you are doing there, but you're clearly not behaving like a normal outsider) you can share in one layer of village life. It certainly helps looking lost, repeatedly goofing your local *Pasale* greetings, joining in the work, and being dependent on your hosts for every basic need.² As I say, this is just one layer, but stay attentive, chat and gossip idly, and other layers poke through – sad and ugly tales of young girls snatched into marriage, or happy tales of instant and enduring life.

The family caring for me lived in a tin-roofed L-shaped house. In the family I only really got to know Uhuru's brother,

who was a teacher and spoke English. His wife and mother stuck to greetings, so I didn't really push things. I could tell from the food that I was being treated as a special guest. My hosts let me eat in my room, which gave me plenty of time to feel guilty about eating so well in the lean season and eating before I had sweated (that is, eating without working). But over the days the boundaries eroded so that I was squatting by the fire in the morning, grubbing at leftovers. I also did not impose upon other boundaries. A young girl strained every morning with a bucket for my bath and I let her do it, although I would have been much more comfortable doing it myself.

Uhuru's farm was about one hour's cycle ride into the forest. Without cattle for ploughing, his fields have literally been cut by hand from the bush. We spent the day weeding – although for Uhuru it was minute-by-minute risk assessment and management: what plant is not doing well (pull up and replace), what bit of ground might be too wet or dry (inter-plant either corn or rice – if one fails because the moisture is wrong, the other will do well), how much are the partridges taking (dig new furrows), which mounds are doing well (shove beans or okra in). Risk is the big difference between my brother-in-law's farm in Devon and Uhuru's farm in Ghana. Uhuru has a three-month growing season but my brother-in-law has winter and summer crops. In the UK there are farming subsidies and pretty good social-economic security (health, schooling, pensions, income support, and other social insurance). Foot and Mouth (an animal disease) was catastrophic, but nobody died. On Uhuru's farm there is a very real possibility that the damage caused by the partridges could set off a chain of events that results in the death of a child.

² The dialect of the *Sissali* language spoken in this area is called *Pasale*.

It is curious how much the immersion is becoming a mirror onto my own life and my own family. And it is not only because the many people that I meet want to talk about my family, or that I know that my family will ask me a lot about the family I stayed with in Ghana. Perhaps it is because I am simply living with people and not treating them as objects for study or planning, seeing them through the lens of some outsider's intervention, or honing my own expertise.

Not doing anything is also like a magic charm that lets you escape from 'Aidland'. 'Aidland', as we know, is a parallel world, which runs to different social, cultural, and political rules. 'Aidland' does have a dark side, which was strikingly manifest in Funsì. More than once in village meetings or private conversations we heard the strong sentiment that 'only the white man brings good things'. Aid dependency is perhaps nothing new, but the truly alarming perversity in Funsì is that a fancy District Assembly for the people's representatives is sited there. An Aid culture that directly or indirectly reinforces the idea that only the white man brings good things is undermining the development of a proper relation between the people and their representatives, and thus destroying hopes of accountable governance and the rights needed to end poverty before they are out of the starting gate. Even worse, the representatives I talked to were actually hungry to know how to develop their roles and how to interact with communities in a participatory way. Sustained popular education on human rights and of the role of the District Assembly, coupled with much better participatory planning and analysis around the District Plans, would make a huge difference.

Rights-based approaches to social development have at least brought these issues to the fore. But reflecting on how hard Uhuru and his wife work and the risky and vulnerable lives they lead, I realised that much rights work is highly fragmented, the rights claimed being hostage to the narrow experience of outsiders and their sectoral interests and prior-

“One of my expectations of the immersion was to ‘unlearn’. But I realised that you cannot really report what you ‘unlearned’. Unlearning is not a happening but an attitude of mind.”

ities. In addition, even successful campaigns that secure important assets, such as land or perhaps piped water, may be couched in the language of rights, but this does not mean that any of the players involved have any clear notion of what claims people rightly have or should have. It is not necessarily correct that in charitable, service-led approaches outsiders decide and people passively accept what they can get, and that in rights-based approaches people themselves decide, organise, struggle, and claim. It is quite possible, for example, to have a service-led approach to claims and advocacy. The difference lies in a deeper understanding about the duties and responsibilities of those holding power, clarity about what human rights mean in concept, policy, and practice, and the awakening within people of the abuses of power against them and their own potential to do something about it. Before coming to Funsì I had made a pitch to ActionAid International to develop a campaign for Universal Socio-Economic Protection, and even though there are real resource constraints in Ghana in general, and Funsì in particular, my experience in Funsì has reinforced my view.

One of my expectations of the immersion was to 'unlearn'. But I realised that you cannot really report what you 'unlearned'. Unlearning is not a happening but an attitude of mind. For me, at least, the immersion was a safe and secure place to be allowed to let go, open out, and be vulnerable. For if you can't do that how can you listen, value what you hear, and notice what the hell is going on?

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Reflections on an immersion: Fungsi, Ghana

by ROSALIND EYBEN

In this second account of an ActionAid-organised immersion in Fungsi, the author discusses the powerful undercurrents of race and perception that her immersion brought to light. At the end she questions whether immersions are the best way to bring the voices and perspectives of poor people to the table.

When I have previously stayed in villages, I have never spent 3 or 4 days almost entirely in the company of the same family. I have always been there to do something, to collect information. The immersion was extraordinarily demanding; while in Fungsi I thought and felt nothing but that experience of being there.

Some of my learning from Fungsi was not a surprise when you put it down on paper: the time and respect people give to each other in greetings and conversation; the risks they take in farming and trading; the sheer hardness of the daily grind. But the immersion convinced me that spending time actually there in the village reinforces and reinvigorates existing knowledge and similar prior experiences. Someone said that it serves as a touchstone, and I felt this immediately after my return from Ghana on being plunged into an institute-wide annual review of our programmes. In all the presenta-

tions and discussions, I found myself asking how this review connected with the lives of my hosts. I noted to myself that one or two of my contributions to the discussion were because of that touchstone – points that otherwise I would not have made.

On our last morning in Fungsi, the organisers of the immersion facilitated a meeting of the host families to discuss how they had experienced our visit. Clearly much was not said because the discussion was in our presence. But while there seemed a genuine appreciation of our having come, because we had now learnt and experienced the suffering that our hosts regularly endured, there was also a worrying expectation that our visit would bring about some kind of material improvement in the lives of the community. At a ceremony on our departure, the acting Chief made this clear in his speech when he looked back on the role of white men in Fungsi – from the colonial officer building the road some 60 years ago to the Mission establishing health and educational services. Now a new group of white people had come to Fungsi to ‘take care of them’.

In our post-immersion reflection we discovered that nearly all our host families had discussed with us the theme of race. That we had all participated in their daily lives, working alongside them, only helped to reinforce the widely

Ghana immersion reflections with Koy Thompson and Rosalind Eyben.

Photo: Koy Thompson

held view that white people were good and their own black rulers bad. One child asked one of the black visitors why he was not white because he behaved like a white person. Telling them about Kofi Annan did not seem enough to prick their deep lack of self-esteem about themselves and their country.

According to a policy briefing that I helped draft, the aim of immersions is to provide 'the personal contact [that] ensures that poor people's voices and perspectives are heard and integrated into new policy approaches and practice at senior level' (Eyben, 2004). But should staff from donor agencies be playing that role? On the other hand, if donors are now busy being influential, should they not on occasions at

least get in touch with the reality of the lives of the people they seek to help?

The idea of an immersion neatly encapsulates the paradox of aid. If we want the quality of that relationship to change, then we must be careful how we design an immersion as a learning event that goes to the heart of the problem rather than evades it. In a country such as Ghana, this might mean encouraging donor staff to undertake such a programme only if they can do so in the company of senior government officials, and that the pre- and post-immersion workshops be structured to provide the opportunity to discuss what are usually the unsayables about power, self-perception, and voice in the relationship.

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Personal reflection on Funsii immersion: ActionAid Ghana

by TAAKA AWORI

The author of this reflection was the Country Director of ActionAid Ghana at the time of her immersion in Funsii, Ghana. She vividly conveys the power of experiential learning, particularly in challenging the underlying values and approaches of development practice. She also reflects on some of the issues that may face a person taking part in an immersion in their home country, or the country where they work.

Before the immersion

The purpose of an immersion is.... well, I am not entirely sure how to describe the purpose of an immersion, but I see it is an opportunity to learn through direct experience about the reality of people living in poverty. The day before we got to Funsii, we had a pre-immersion reflection where we talked about our expectations. As is customary for me, I had a billion-and-one expectations, which included:

- I wanted to understand how power is conceptualised in the community;
- I wanted to understand the conceptual framework for change in the community and what change they wanted to see in their lives;
- I wanted the people living in poverty to become so real to

me that I stop seeing them as an abstract group that I often romanticise;

- I wanted to confront my prejudices about people living in poverty; and finally
- I wanted the whole experience to leave a footprint on my soul (as you can see I aim high...why not, I thought?).

After some group discussion, it became apparent to me that many of my expectations were unrealistic. I mean seriously, how did I expect to understand how the community conceptualises power and 'change' in 3 days? I am not even sure how I conceptualise power or change and I live with me. I was beginning to learn what can and cannot be achieved in an immersion. So I let go of my expectations about getting an understanding, which was fine by me because I wanted to get away from the usual development analysis of people and situations. I opted to let go and determine that when in the community I would simply observe, experience, listen, and simply be... I would then see what learning would arise.

During the immersion

I lived with an older man, his three wives, and various children. In the daytime I worked with my host mother and her co-wife to make shea butter, I went to the farm to sow

Ama Gariba, flanked by senior members of the Women's Soyabean Group which she leads, during a discussion with the ActionAid programme co-ordinator about the impact of the immersion in Funsì.



Photo: Kweku Koranteng

Taaka (left of picture) being taught by her host how roasted shea nuts are ground into the paste from which shea butter is extracted.



Photo: Kweku Koranteng

groundnuts, I drank *pitto* (the local alcoholic brew), and I ate many tasty meals of TZ (the local dish). In the evenings I lay on a mat with my interpreter under the bright stars, while my host mother told us mystical Funsì tales of courage and cunning. At night I lay under the mosquito net, in my narrow camp bed, in an empty room next to my host father's room.

As is customary in Africa, I was treated like an honorary guest and thus never fully felt the hard edge of poverty that one associates with rural communities. During the 3 days, to my surprise, poverty and its attendant hardships tickled my consciousness at the fringes but never came and took a front seat. I saw it, could feel it, could smell and could hear it, but only in the shadows, in the background. I never talked about it. Instead what was upfront in my face was culture: the rich African culture, its complexity, its perils, but most of all its humanity. For 3 days the greetings, the family meetings, and the stories revealed a positive side of African culture that I knew existed but had forgotten.

I was thrown totally off guard. When you spend as much time as I do fighting the patriarchal dimensions of African society that as a woman threaten to strangle you and your sisters' development, you forget. When you spend so much time listening to stories that the West has told about Africans – about our poverty, our corruption, our penchant for brutal wars and other inhuman practices – you start to believe those stories and start to tell them about yourself; you forget. You forget that Africans are not just poor people, and even when we live in dire poverty, we are more than our poverty. We

have a strong social fabric that holds us together; we have strong values about humanity and how to foster humane and thoughtful societies. Despite all the stories and horrors I had seen Africans do to each other, in Funsì I remembered that deep within us as Africans is a knowing and living that is deeply humane and at one with nature. The people I met in Funsì were not perfect, but they had a lot to teach the world about how to live with and value each other. I am still very much alive to the patriarchy and inequity that exists within African culture, but I am simply being reminded that there is more than just this.¹

The other major reminder I got while in Funsì was about the relationship between Africans and the white man. One day, sitting on a mat under the stars, I asked my host mother about the changes she had seen or heard about in Funsì over the years. She talked about the roads, the schools, girls going to school, the clinic – all as positive things that had happened. Eager to understand her perception of what drives positive change, I asked what brought about these things. Her answer was simple: the white man. With those three words, my host mother reminded me very vividly of the discomfort I have always had with Africa's relationship with

¹ Note from the author: Please forgive me for using the term 'African culture' as if it is homogeneous. I am only too aware and respectful of the diversity within the cultures of Africa, but being a child of many of these diverse African cultures, I am also constantly surprised at the commonality and likeness between them. By using the term 'African culture', I am including myself as an object of reflection rather than simply the people of Funsì and their culture.

“It was a very different way of learning for me because I learned experientially. In that sense, all of me was learning, not just my mind, as is usually the case.”

the white man. We are the oppressed, the subjugated, the colonised, and recently the recipient, the debtor and/or the grantee. We are too often on the receiving end, and rarely full partners and agents in the relationship. More recently, on the global level, we are being rescued by Tony Blair and Bob Geldof. Something is entirely wrong with that picture. The difficulty is that that relationship starts to affect thinking about who should drive our development at the community, national, or global level. Do we trust each other enough as Africans to lead and be responsible for our own development? I don't have the answers to these questions, but I think as Africans we owe it to ourselves to start confronting these difficult truths.

After the immersion

During a day of reflection we pondered among many things how the experience would affect our development practice. A number of thoughts and feelings emerged within me.

I need to address the poverty that is much closer to home

During the time in Funsu I kept asking myself, why I don't get this close to people living in poverty closer to my home – those in my own village, or near my house in Accra? Did I have to go so far away to the Upper West to experience this? What I realised is that I fear I will not manage the demands of those who have much easier access to me, or who have some entitlement to me such as a distant relative. The experience in Funsu reminded me of the need to come to terms with this and stop seeing people living in poverty simply as supplicants.

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There is an important need to have an alternative model of development that nurtures how people treat and value each other

Being in Funsu reminded me so much of how underdeveloped and uncivilised so-called 'developed' countries can be, particularly in human relations. Yet in so many instances, this is the model of development that 'underdeveloped' countries are to aspire to. Even in wealthy nations, many thoughtful and caring individuals are struggling to incorporate a more spiritual, humane, simpler, and environmentally conscious model of living. Clearly, an alternative model is urgently needed where in Africa we let go of what is not working yet nurture and evolve what is.

The practice of development should include working with concepts of self at the individual, community, or even regional levels

The comment by my host mother and the issues of Africa's relationship with the West are very much about concepts of self vis-à-vis the other. These may arise in a gender situation, in a race situation, in an ethnic situation, or in any situation where there are unequal power relationships. Yet unless we acknowledge these feelings, and unless we claim our own power, then we continue to be the biggest barrier to our own development. These kinds of issues need to come more into the development discourse.

Last words

The immersion has helped me grow as development practitioner, but more importantly as a person. It was a very different way of learning for me because I learned experientially. In that sense, all of me was learning, not just my mind, as is usually the case. The immersion allowed me to stop analysing people living in poverty as objects of development, but rather just to be with them and allow the learning to emerge.

The love and acceptance of my host family to me, a total stranger, was probably the biggest gift of the three days. Therein lay my greatest lesson.

15

Reflections on my immersion in India

by GARY FIELDS

This account was written following a SEWA-organised EDP in Gujarat in January 2004.⁴ The author was one of a group of development analysts who preceded their discussions about labour markets, trade and poverty with exposure to the lives of six SEWA members. The women's life stories provided a frame of reference for the technical dialogue that followed. The first half of the article gives a flavour of the SEWA member's life and community, while the second shows how the experience influenced the author's judgment about the minimum wage. As with all these accounts the comments reflect the author's personal opinion and perspective at the time of writing.

I'm going to divide my reflections on my days with my host lady, Kalavatiben, into two parts. First, I'll talk about the human experience. Then, I'll talk as an economist.

Kalavatiben and her family are relatively fortunate poor people. I was amazed that they lived in a cement house with two rooms and a loft, electricity, running water, a toilet in the

house. From what I knew of the kind of work she does and the poverty of India, I was thinking it would be a shanty without any of these amenities. The house was in quite good shape, much better than those of many other city-dwellers doing comparable work in other poorly paid occupations.

Kalavatiben exhibited an incredible sense of hospitality. She took so much time away from her productive work to be with us and to cook and clean. Because she works on a piece rate basis, she couldn't be rolling *bedis* during those hours, and so she lost days of badly needed wages, which made me feel terribly guilty.⁵ I insisted to our Self Employed Women's Association (SEWA) facilitators that I give her money for the lost wages, which went against SEWA policy. The compromise we reached is that I could buy them needed provisions, which I did. Kalavatiben was overwhelmed. 'What did I do to deserve so much from you?' she asked. My answer to her was, 'You've opened your home to us and shared all you have with us. This is a small way of thanking you for all you've done.' Given her circumstances, her generosity was extraordinary.

I was struck too by the sense of community on her street. The more I took pictures and talked to neighbours, the more

⁴ It was previously published in a collection of papers 'Reality and Analysis: Personal and Technical Reflections on the Working Lives of Six Women', Working Paper, Department of Applied Economics and Management, Cornell University, April 2004.

⁵ *Bedis* are a form of cigarette made from tobacco leaves.

people came out to be a part of things. They invited me into their homes, asked for their pictures to be taken, and offered tea (and in one case, sweets). These people may be poor financially but they have a very rich community, much richer than we do in Ithaca (the town where Cornell is located).

Kalavatiben has lived a life marked by great personal pain. She was orphaned at age three, married at age nine, and taken far away from her home (Solanpur) to Ahmedabad at age 13. She has suffered an abusive husband, harsh in-laws, death of a daughter-in-law, and two sons who have caused much trouble, one because of gambling and one because of drinking. Following the death of her daughter-in-law, she also has responsibility for two grandchildren, who live with her. She exhibits much love for them. Her husband lives up in the loft and came downstairs to use the toilet and eat, always by himself. I never saw her look at him with any kind of love or even friendliness.

Kalavatiben said her neighbours wondered how she could look after us. Her response to them was, 'They will stay with me and sleep where I sleep and eat what I eat.' That is what we did. She made us a part of her family. We stayed the night sleeping on the floor in the main room with all the others. It wasn't comfortable but it was special. As for the eating, we have two Indian restaurants. I told Kalavatiben, 'If you could make such delicious food in our town, you'd drive those two restaurants right out of business.'

Turning to the professional side of the trip, our facilitators, Manaliben and Shaliniben, are both labour lawyers. We were fortunate in being able to accompany them to the Gujarat Commissioner of Labour's Office. We sat in on two meetings, the first to establish a minimum wage for kite-makers and the second to establish a Provident Fund for *bedi* workers. We watched as SEWA negotiated with the three employer-owners. 'We' included the negotiating team led by Manaliben, as well as Padmaben and myself and Kalavatiben and five other *bedi* rollers. I can't even begin to imagine that in the US there would be a group of workers like this welcomed into a meeting with the assistant commissioner of labour. Though they didn't speak, they were there, and their very presence added a very vivid touch to the proceedings. The negotiations were successful, so for Manaliben and

Shaliniben, it was a day of victories.

Because of what I saw on the ground, my professional judgment about minimum wages and supplementary benefits changed. With the standard labour economics model in mind, I had worried that the minimum wage might hurt the very women it was meant to help, because of a loss of jobs. In this context though, the minimum wage does not act as a wage floor. It acts as an aspirational target. If *bedi* rollers earn Rs. 36 per 1000 *bedis* and a minimum wage is set at Rs. 80 or 90, there would probably be major job losses. However, the SEWA team is astute enough to take this into account, and so they negotiate for minimum wages, expecting that they will not be paid, at least not now. However, the very fact that a minimum wage is set at so (relatively) high a level strengthens SEWA's negotiating position.

In this context, the 'minimum wage' is not the usual one of an above-market-clearing payment per unit of time. It is, rather, a negotiated piece rate. Similarly, a Provident Fund, with contributions from employers and workers, is also better seen as an increase in the piece rate. Watching the employers negotiate, they seemed to be quite unconcerned about the effect of the Provident Fund on their costs. It appeared to me that they would continue, as now, to buy up at the negotiated rate as many *bedis* as the women produce. It appears therefore that these women will earn more with essentially no effect on their employment.

Set in this way by negotiators who take full account of possible job losses as well as earnings gains, the minimum wage and Provident Funds are meant to help all of the women in their respective occupations and not, as is often the case in other contexts, insiders at the expense of outsiders. This kind of 'wage' increase is something that I favour. Without this experience on the ground, that is not something I would have said two days earlier.

I will conclude with one final thought. I have long thought that if I do my homework before I set off on a trip, nine out of ten notions that I had before are confirmed, but it is the tenth one that makes the trip worthwhile. That is exactly what happened this time. Truly, this was a life experience I will never forget.

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The salt of the earth

by PRAFUL PATEL

This account was also written after an EDP with SEWA. It is a powerful testimony by the World Bank's Vice-President in South Asia of the lessons he has learnt from his regular visits to a family of salt workers who live on the edge of the desert in Gujarat. The author writes of his profound respect for the family, and for the way in which his relationship with them has renewed his passion for his profession.

For the past 4 years, Bhavnaben has been my touchstone of progress in India's booming economy. Since the time I first met this young mother and her family of salt workers on the edge of the desert in Gujarat, I have returned regularly to visit them. I go to experience first-hand the life of India's poorest citizens, to learn about their hopes and dreams, and to better understand the challenges that confront them in their struggle to climb out of poverty.

The welfare of poor people is the chief reason I do what I do for a living. But, for us to deliver on our promises to help them, we need to clearly understand the bewildering complexities of their situation. No single analysis or study can take the place of first-hand experience. And no fleeting visits from air-conditioned cars or the safe havens of first-world

hotels can substitute for living their lives by staying and working beside them.

The area around the Little Rann of Kutch in Gujarat is not covered under any World Bank programme. Instead, the Self Employed Women's Association (SEWA), which is working actively with the women of the region, organised our grassroots immersion. SEWA has conducted some 20 immersion programmes over the past several years, and this was their first collaboration with the World Bank. It was a curious coincidence that, in the draw of lots, I drew India for immersion, and this particular part of the country. My forefathers had migrated from Gujarat in the 1920s and I spoke the language fluently. The ease of communication that this afforded helped me to build a special rapport with my hosts. Later, in an aside, the programme coordinators told me that when they heard that the Vice-President of the South Asia region was coming for an immersion, they made it a special point to allot the most difficult part of their region for the purpose – in this case, the saltpans of the Little Rann.

Clearly, life in the desert can never be easy. Temperatures vary from the scorching heat of the day to the intense cold of night. The blinding whiteness of vast expanses of salt causes many diseases of the eye, including night blindness, and the constant exposure to chemicals and salts leads to

**Bhavnaben's shelter
at the saltpan in the
desert (Little Rann of
Kutch), Gujarat.**



Photos: Caroline Vagneron

sores and lesions. The story is often told that the feet of salt workers never burn completely on a funeral pyre because of the high levels of salt that have been absorbed into their systems over the years.

The rules of the immersion programme were strict. We were to do everything – absolutely everything – that our hosts did. For me, this meant following Bhavnaben as she went about her daily routine – waking before dawn (at 4.00am sharp, without the help of an alarm clock in her case), collecting firewood, carrying water home, cooking for the family, washing up with the barest minimum of water (only two glassfuls), walking 10 kilometres across the sun-baked plain to the salt pans, putting in backbreaking labour under a scorching sun, and winding up the long, hard day with a frugal meal of flat millet bread and a vegetable – often the same as was had for breakfast and lunch.

Bhavnaben and her family were hospitable hosts and reluctant to let us do anything at all. We had to insist that we would do everything she did – however ham-handedly. We spilled precious water while carrying it home on our heads, rolled thick and lumpy *rotlas* for lunch, and suffered aching arms and legs as we tried to beat down the dykes that surround the salt pans. Robert Chambers, who accompanied me in the programme, learnt the hard way. Robertbhai – or ‘brother Robert’ as he was renamed for the duration of our stay – did not hesitate to take off his sandals and step into the deceptively cool brine to assist Bhavnaben. In doing

so, the brine splashed all over his clothes and body, and once dried, gave Robertbhai a particularly hard time for the next few days.

We also had our share of heart-wrenching moments. On our last dinner with the family, Bhavnaben insisted that she cook us a special meal, including sweet *halwa* – one of the rarest treats for the family. She used the allowance she was given for our stay to buy the ingredients. I can never forget the sight of Bhavnaben carefully counting out twenty small raisins at a local grocery shop for cooking the special dish, for though they were the ultimate luxury in her eyes, she insisted that the dish would not be complete without them. I cannot now pass a grocery store without thinking about all those who don’t even know the taste of food that many – whether in India or the West – regard as commonplace.

My visits brought into stark relief the uphill battle faced by those who are left out of the economic mainstream. I witnessed the poor people’s vulnerability to exploitation from those who wield power over them. Whether it was the sole seller of water to needy desert families, or the moneyed supplier of credit to those in need, the dependence of the poor on unscrupulous service providers left them open to all manner of extortion. I saw how easy it was for them to slip back into deprivation despite their best efforts to escape the poverty that has entrapped their families for generations. An illness meant the loss of precious work days, and a big setback in income. Medical care was not easy to come by, local

Bhavnaben at the saltpan.**Mr Patel conversing with his host lady, Bhavnaben, and her daughter during one of his regular visits.**

doctors were not particularly well qualified, and it was both expensive and time-consuming to go to the bigger towns for attention.

The need for additional hands to work meant taking the children out of school. Bhavnaben's eldest daughter was required to look after the household, and the oldest boy was needed to man their shop on the salt pans. Although the three younger children were in school, the quality of their learning left much to be desired. All parents dream of giving their children a better future. But poor families' inability to cope without their children's additional labour invariably compromises the one thing that can make a real difference – education. The question continues to nag me: will Bhavnaben's children ever be able to avail of the new opportunities provided by India's booming economy?

What, then, can their future hold? When I tried to talk to Mangabhai, Bhavnaben's husband, about his financial planning for the time he can work no longer, he looked at me with glazed eyes. He had absolutely no idea. 'The poor don't have the luxury of looking into the future,' Bhavnaben said to me.

But ensuring a better future for the poor is the World Bank's mission and that of many other development agencies. On its part, SEWA has been exploring alternative livelihoods for the 40,000 families engaged in the salt industry in the area. Though it is unrealistic to expect suitable alternatives for such a large number of workers whose entire lives – for generations – have revolved around the cycle of salt farming, they are taking the first few steps in this direction. SEWA has helped the salt workers to negotiate a better price for their salt by bypassing exploitative middlemen, and is now

Mr Patel with some of his World Bank colleagues and SEWA organisers observing Bhavnaben's husband reinforcing the dykes of the saltpan.



encouraging them to produce the more lucrative magnesium. Salt-making families are being helped to tide over the lean period through credit lines, and the women are being empowered by organising them into self-help groups. In fact, with much less gender inequality among the salt workers, the men-folk of the community face a much harder life. Unlike the women, they cannot get any other work, and they do not have a SEWA to help them.

Standing next to Bhavnaben I feel small. Despite having experienced hardships all her life, she was always smiling, cheerful, and optimistic. I saw her remarkable ability to cope under the most extreme circumstances. Many of us with far more resources and privileges would not be able to survive

the way she does – shouldering equal responsibility with her husband on the salt farm and still managing to look after every little need of the family with good cheer. There is also an enormous dignity, both within the family and in the larger community. They display great respect for each other and share what little they have with disarming openness.

My exposure to the harsh realities of the lives of the poor has given me a fresh perspective on their condition and a new respect for them. Bhavnaben and her family are, for me, much more than a case study – they have helped me develop a deep understanding of the intricate web of challenges that confront them, and in the process have renewed my passion for my profession.

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Everyone at Sida should do an immersion!

by OLOF SANDKULL and GÖRAN SCHILL

The following account was written by two Sida staff members following their stay with a family affected by the 2004 tsunami in southern Sri Lanka. The piece shows how initial scepticism was replaced by enthusiasm for an approach that offers more than the usual 'ceremonial' project visit by foreign donors. Sida is leading the field among donors in institutionalising the practice of immersions (see Nilsson et al., Section 4). At a time when many donors are moving further and further away from having any direct contact with people living in poverty – in part a consequence of the shift towards budget support – Sida is signalling its commitment to reducing that gap.

'Everyone at Sida should do an immersion!' This was the spontaneous reaction of Göran Schill in Colombo after we had spent 3 nights with a tsunami-affected family in southern Sri Lanka. When I first approached Göran about my immersion plans, his response had been quite sceptical. He questioned whether this was really what the staff of a funding agency should be doing. He was concerned that it would turn out to be a superficial 'poverty tourism' mission in which Sida staff would again take centre-stage. These

were well-grounded concerns, based on being part of too many ceremonial project visits with too little time to interact with poor people. On the other hand, if you spend about 90% of your time in an office or in meetings with other donors, you become quite distanced from the realities around you, even if you live in the country.

The Asia-MENA (Middle East & North Africa) Department has included in its annual plan a statement that all country programme coordinators should do an immersion during 2007 in order to increase the poverty focus of their work. The idea behind doing an immersion is to gain insights into people's lives through participation and observation, and to get a crucial reality check.

Nilantha's story

The purpose of our immersion was to enhance our understanding of how poor people deal with the realities they face. We wanted to understand how people affected by the tsunami have experienced and participated in recovery activities. The immersion was organised by an NGO named FORUT (Campaign for Development and Solidarity). We spent 3 nights with fisherman Nilantha Kumara, his wife Nadeesha, and daughter Jani. They had a house on the beach that was destroyed by the tsunami and are now living

Olof Sandkull and
Göran Schill with their
hosts Nadeesha, Jani,
and Nilantha.



Photos: Chandralal De Silva, FORUT

in a new house in the Yayawetta tsunami resettlement project located a couple of kilometres inland in Hambantota District.

When the tsunami hit, Nadeesha was in the house and Jani was sleeping in her cot, which started to float. Although they were able to find safety on the roof, Nadeesha does not want to move back to the beach. Nilantha would like to, but respects his wife's trauma. It is difficult to fish when living away from the sea because Nilantha uses methods that require that him to be on immediate standby. Nilantha can be described as a self-made man with strong integrity who is ready to work hard for a better life, something that has not been so easy despite 'the second tsunami' of foreign funds pouring into Sri Lanka.

Outcomes of the immersion

During our stay we heard many stories about how tsunami recovery money had been misused or distributed to non-eligible persons. A general rule that was restated to us many times was that those who lost most received the least, and those who were unaffected had both the time and energy to grab as much as possible. By not being aware of or addressing local power structures and patron-client systems, and by not involving the target population, many of the reconstruction activities did not reach those most in need, or were not effective. It was also evident that the same forces are at play during regular development activities, and that many lessons can be learnt from this which are applicable to other countries.

Photos: Chandralal De Silva, FORUT



Olof takes a boat trip with local fishermen.

The immersion gave us first-hand experience and interaction with people living in relative poverty, and increased our understanding of their realities and coping strategies. Some of the key gains included:

- relating to poor people's realities;
- enhancing our country knowledge;
- formulating more informed questions; and
- triggering reflection.

All these insights assist in applying a rights perspective and poor people's perspective to development and, especially, the four underlying principles of participation, non-discrimination, transparency, and accountability.

Lessons learnt

We collected a few lessons that are worth sharing with others planning to do an immersion.

- First of all, it is important to be careful when choosing a local organiser, and to try to find one which is firmly based in the local culture and which adheres to bottom-up participatory approaches.
- The interpreter is a key person in the overall success of the immersion. S/he should be familiar with the community and know the area well. S/he should also be able to function as a facilitator in order to provide advice and explain the bigger picture. It is also important that their personal skills are good, to enable the interpreter to communicate and interact easily with different kinds of people. An earlier experience with anthropological work is desirable.
- Try to find out as much as possible about the local context and situation of the host family beforehand. It helps you in your interaction and also with what to bring and expect.
- Bring practical products for payment for the stay and as personal gifts.
- Write down your purpose and professional angle for the immersion as clearly as possible in order to make it easier for the organiser to understand what you want. This also lessens the risk of misinterpretation and unrealistic expectations.

Conclusion

All in all, we think that there is a lot of added value in an immersion, and therefore we recommend that all programme staff at Sida should do one. Interestingly, the family of Nilantha also found our visit worthwhile. They said this was the first time they had had a chance to interact with foreigners and learn about our country.

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Legends of Choar Mumtaz:
Saleiha Chachi smiles

by JOHN SAMUEL

The author of the final article in this section carries out regular visits to communities in different parts of the world of his own accord. These visits are low-key, self-organised, and self-motivated. There is no facilitator, and sometimes no local organisation paving the way. These visits have become opportunities within one person's busy working life to take stock, to learn, and to be challenged. More than that, however, they challenge us as readers to reflect on the gulf that separates the 'experts' in development from those affected by the decisions they take. In this particular instance, although accompanied by the programme manager of a local partner of ActionAid, the journey was a personal one rather than being related to any specific project, and the author requested that his ActionAid identity be kept private.

I regularly make solitary visits to villages in different parts of the world, including my own village in Kerala, India. For me, these are more than immersions. They are intensely personal moments during which I can reflect, learn, unlearn, and imagine. They make me restless but hopeful. They disturb me deeply, but at the same time recharge me. More than anything they challenge me.

Before I leave, I read the history of the area and discuss its development dynamics with friends. Once there I meet, listen, and talk with people. I usually take early morning walks to observe what's going on. In some cases I go as a volunteer, without revealing my ActionAid identity or introducing the power dimensions that go with that title. When I go as a volunteer I contribute the salary of those days to a cause in that particular village.

For me, these visits are a pilgrimage of learning, solidarity, and meditative days away from the development circus. I wrote the following after one of these visits, to a remote island called Choar Mumtaz in Bangladesh, where I stayed for 5 days in January 2004.

Legends of Choar Mumtaz: Saleiha Chachi smiles

Saleiha Chachi keeps smiling. Her tobacco-stained teeth give some hints about her age: she must be in her mid-sixties or early-seventies. She lives on Choar Mumtaz, a remote island near Golachipa in the Meghna river of Bangladesh. It takes almost 18 hours to reach it by boat.

Saleiha Chachi remembers the horror of the flood in the 1970s. It washed away most of the people of Choar Mumtaz, but Saleiha Chachi lived to tell the story. She lived to change Choar Mumtaz. She lost everything, including her

first husband and children. She still remembers the stench of death. She was a young and beautiful woman at that time. Almost 4 days after the flood she found herself stuck in the branch of a tree, realising that the place where her house used to be did not exist any more.

But her will to live prevailed. She slowly picked up the pieces of her life and rebuilt them, all by herself. In those days there were no NGOs or any other support. She married again, and now has three children. She never had the chance to go to school, but she has picked up the Bangla alphabet. Today she runs a school – a ray of hope in Choar Mumtaz. She is one of the few women not to wear the veil in the whole island, and she encourages her daughters-in-law and daughter to do the same. Her smile, bright eyes, and perspective, and her boldness to change the situation within and around her, make her a rare woman leader in Choar Mumtaz.

She inspired me. She symbolises the thousands of unsung, unheard, and invisible leaders, both women and men, who make change happen. Most of them are real volunteers, driven by a sense of purpose and the courage of their convictions. They speak in their local language. They do not have the luxury of travel outside their communities. I was happy to discover Saleiha Chachi, and happy when Action-Aid Bangladesh decided to honour her during its twentieth anniversary celebrations. That must have been one of the very few times she travelled outside the island.

Choar Mumtaz is in a time warp: it is like visiting a village in the 1970s. There is no electricity, no telephone, no hospital, few roads, and no cars. The élite travel by bicycles. But it looked beautiful in the afternoon – like a green patch in the midst of the shining Meghna River. It boasts a weekly market, where goods from mainland Bangladesh arrive by boats. The market is also a sort of public sphere. People across the island come here to sell, buy, exchange, and entertain themselves. It provides a bit of celebration in this rather quiet island. There is also a cattle market, where around 100 cows, goats, and bullocks wait impatiently for buyers. The most astonishing thing was that I could find few women in the market; the few who came covered their faces with black veils.

In the main barbershop, at the entrance to the village, I saw a rather impressive poster of Saddam Hussein – the only visible symbol of globalisation. There is one pharmacy and a young ‘doctor’ who runs it. He is one of the enlightened souls of the village, who said that he finished school and learned ‘pharmacy’ in Calcutta. He has the answer to all the usual ailments, ready with a quick diagnosis and medicines. His small room is the one and only primary health care system.

“She inspired me. She symbolises the thousands of unsung, unheard, and invisible leaders, both women and men, who make change happen. Most of them are real volunteers, driven by a sense of purpose and the courage of their convictions.”

During an evening walk in the main street I met the only globalised man. He showed off his little English, to the wonder of around ten people who were curious to hear our conversation. He said that he had worked in the Gulf and knew about the world a bit. He is the only engineer in the town, maintaining the few generators owned by the élites. He also supports the electric generators and projector in the sole entertainment centre – a thatched cinema hall, to which the young people of Choar Mumtaz sneak out in the evening to catch a glimpse of Bollywood.

On the way back from the market in the evening I saw a rather well-made house, by the standards of the village. My friend told me that it was the house of Haji Sattar Chacha. He is relatively well-off from farming, and the only man in the village who has been able to go to Mecca for Hajj. A short, dark man, with a white beard and tobacco-stained teeth, he became a father at the age of 72. His third wife is in her twenties and his son is four years old. He told me the legends of Choar Mumtaz: the flood, the farm, the people, the market, his trip to Mecca, and development. He gave *zakat* and started the first high school – Haji Sattar High School – the only high school in the whole village.⁶ With a young wife, a small son, a white beard, and a school to his credit, Sattar Chacha looked a happy man, who lives a happy life in the lush green of Choar Mumtaz.

Choar Mumtaz looked beautiful, but it also looked sad. A sad beauty standing alone in the midst of an unpredictable river, with danger concealed deep beneath its silver-green waves. There was a soothing wind; no pollution; little noise: just the sound of the flowing river, and the sight of naked children running around. The earth smelled fertile; the people on the street smiled. No police, no state, no globalisation.

I went to the local *Kali* Temple with some young Muslim

⁶ *Zakat* is one of the five pillars of Islam, and is the obligation on Muslims to give a proportion of their wealth for charitable objectives.

friends. There was no discussion about secularism and pluralism, but a few Hindu families happily coexist with the majority Muslim population. Choar Mumtaz seemed to be blissfully unaware of the tensions in the wider world beyond.

Choar Mumtaz looked like an imaginary island. The big world, beyond the vastness of the river, starts at Golachipa and ends at Dhaka. The lone NGO is the sign of 'development' on the island. I stayed at their place as a guest, a mix of shelter, home, and office, and one of the few concrete constructions among the scattered huts surrounded by plantain, bamboo, and coconut trees.

There are hundreds of thousands of unsung and unheard leaders in villages like Choar Mumtaz right across South Asia and the rest of the world. They may not have the development jargon or a strategic master plan to 'deliver development', but they act out of conviction. They bring people together. They help mobilise resources. They plan with people and make things happen: getting water, building schools, challenging unjust practices, and reforming their societies and cultures. Saleiha Chachi made me humble. She taught me a couple of lessons about survival, development, and change.

The tragedy is that the key proponents, experts, and missionaries of modern development discourse spend more time in seminar rooms and boardrooms. Those who take decisions regarding women's rights, human rights, and governance are far away from the lives of the poor. They often derive their power from sleek, ready-made PowerPoint presentations rather than from the power of experience or the power of people. These encounters with the

"The tragedy is that the key proponents, experts, and missionaries of modern development discourse spend more time in seminar rooms and boardrooms. Those who take decisions regarding women's rights, human rights, and governance are far away from the lives of the poor."

real lives of real people living in poverty make me restless about my own validity and role in relation to the hundreds of thousands of people like Saleiha Chachi in the world.

For me, my trip to Choar Mumtaz was like a pilgrimage: a cleansing act, a spiritual exercise, an offering of myself to feel my own roots. It was an act of nostalgia. It reminded me of my own beginning in the villages, as an invisible but inspired teenager who passionately wanted to make change happen, with no knowledge of development or NGOs. It brought back the memories of my life for 2 years in the remote tribal villages of Mizoram in India. It reminded me of my work with slum dwellers in Pune.

The legends of Choar Mumtaz stirred me. They grow within me, making me feel and imagine, making me restless. On my way back, sitting on the deck of the boat and looking at the gentle waves of the Meghna River, I realised:

I feel therefore I am; I think therefore I do!

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Section 4: Institutional accounts

The previous section demonstrated the impact of immersions on individual people. While this impact can be powerful and highly intense, it remains limited to those directly involved and to their immediate professional and personal contacts. This section moves us on from the individual perspective to explore how a range of organisations are using immersions for different purposes. In various ways, each is trying to embed the principles and practice of immersions for different ends, to:

- enhance the selection, orientation, and training of staff;
- strengthen programme development and accountability; and
- influence institutional policy and direction.

This 'institutionalisation' of immersions is at a very early stage, but as Robert Chambers writes in his introduction to this edition, 'Ask yourself: what would have happened if the experiential learning and reflection of immersions and reality checks had been the norm of good practice of development professionals over past decades?'

Part 1: Staff selection, orientation and training

There are four articles in this section. The first two are from NGOs in India. The **HRD UNIT** and **VISHAL JAMKAR** write from **PRADAN** (Professional Assistance for Development Action) and **RAJ KUMAR** with **HARIDARKEE** writes from **SRIJAN** (Self-Reliant Initiative through Joint Action). Both organisations use immersions as part of their recruitment and orientation processes. The third article is a contribution from **POONAM SHROFF** at **SEWA** (Self Employed Women's Association), about how the organisation uses Exposure and Dialogue Programmes for internal capacity building of its staff. In the final article in this section, **BOSSE KRAMSJO** describes how Swedish teachers and educational professionals take part in regular 'Global Journeys' to learn about sustainable development issues in their teaching.

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Immersions as a form of apprenticeship at PRADAN

by HRD UNIT at PRADAN with a contribution from VISHAL JAMKAR

PRADAN (Professional Assistance for Development Action) recognises that grassroots community work requires young people to 'swim against the social current' of contemporary India. It offers an apprenticeship programme during which new trainees can reflect on their career choice. The account here includes views from the organisation and also an account of the experiences of one of their recruits, Vishal Jamkar.

Introduction

Established in 1983, PRADAN (Professional Assistance for Development Action) is an India-based NGO working with over 100,000 poor rural families. PRADAN's mission is to enable these poor families to live a life of dignity by strengthening their livelihoods and giving them access to sustainable income-earning opportunities. This involves organising them, enhancing their capabilities, and introducing ways to increase their incomes by linking them to banks, markets, and other economic services and opportunities.

PRADAN owes its genesis to a strong belief in a simple idea – that caring and capable people, rather than material resources, are crucial to accelerating the process of social

development in our country. Rural community development is a complex process involving the interplay of social, political, and economic forces. Capable and caring people can accelerate this process, and make it more humane, especially for the poor, by working among them in the village in a sustained way. Not everyone is cut out to be a 'helping person', which is at the heart of grassroots community work. Such work also requires youngsters to 'swim against the social current', and bear with unfamiliar and difficult conditions – in both work and life – by choice.

Because of this, PRADAN has developed an apprenticeship programme, which provides new development trainees with an opportunity to assess the pluses and minuses of life in grassroots work. It also gives time to reflect upon alternative career choices, and to think about the expectations of family and significant others, as well as the trainee's responsibilities towards them. The cost of apprenticeships is supported by reputable Indian and foreign donors (e.g. Sir Ratan Tata Trust, Ford Foundation).

PRADAN uses a carefully designed multi-tier selection process to recruit trainees to the programme. Trainees come from professional backgrounds or are post-graduates with social science/pure science backgrounds. Our aim is to prepare them to use their knowledge and skills to fight

Vishal Jamkar with his hosts sowing SRI paddy in Tetar village.



Photo: Vishal Jamkar

poverty and work for the benefit of the rural poor. The development apprenticeship runs for 12 months, and allows the trainee to experience and explore life and work in grassroots community development. Refined over the years, it is the main mechanism for PRADAN to train university graduates of varied disciplines as development workers.

Most of the programme takes place at the field level. A trainee is attached to a field guide who has been trained through a three-phase field guide development programme. This programme prepares PRADAN professionals with more than 3 years' experience in PRADAN and strong roots in development work to become a 'mentor' to the trainees.

The learning ground of the apprentice mostly overlaps with the work area of the field guide in the project location. The learning cycle is:

- guide does, apprentice observes;
- apprentice does, guide observes;
- we both experiment together to find better ways of doing things.

The programme offers these young people a 'reality check'. It gives them a chance for reflection 'inside', and for motivation and exposure 'outside'. It gives them the oppor-

tunity to make an informed career choice as to whether or not they want to do grassroots work. An apprenticeship allows one to experience the living conditions and broad content and pace of work in villages. The apprentices experience and learn about:

- the contexts in which poor people live;
- the conditions in which they would work; and
- the kinds of impact they might have/make.

While learning, apprentices also explore the changes they would have to make in their own lives. The programme aims to instil sound professional values in the apprentices and to help them develop attributes such as how to:

- adjust to difficult living conditions;
- manage with poor logistics;
- have empathy for the communities they work with;
- stay a step behind the community to facilitate them to take charge;
- facilitate women to manage their self-help groups; and
- facilitate the community to take up income-generating activities to improve their economic conditions and ultimately their lives.

Above all, they learn the practical skills of grassroots

Vishal Jumkar at the castor plantation in Bondri village with Jhingobai.



Photo: Vishal Jamkar

development work through this learning cycle. These values, skills, and attributes are the basic preparation for a long-term career both at PRADAN and in grassroots development. From time to time, apprentices and their team members also reflect whether they are suitable for this sector or not, and where they are vis-à-vis their learning agenda. All these processes have been institutionalised and fully integrated into the working of PRADAN.

For PRADAN, apprenticeships reduce uncertainties and contingencies in its core activities. We face many uncertainties in the external environment so it is important that our staff are highly professional. The development apprenticeship process allows us a higher degree of reliability. This serves the critically important purpose of building confidence in the organisation and in its ability to deliver.

PRADAN recruits 100 to 150 development apprentices per year. Out of these, 40 to 50 join PRADAN as executives at the end of the 12-month apprenticeship programme to pursue a career in rural development. Currently, more than 200 PRADAN professionals are spread out in small field-based teams across 3,044 villages in remote and poor areas of Bihar, Jharkhand, Chattisgarh, Madhya Pradesh, Orissa, Rajasthan,

and West Bengal.

The apprenticeship programme has been of enormous benefit to PRADAN.

- More than 936 university graduates have joined the apprenticeship programme since its inception.
- Of these, 303 apprentices graduated as PRADAN executives.
- Between April 2000 and March 2006, 66% of the graduating executives continued to work in PRADAN and another 13% continued in this sector after leaving PRADAN.
- In 2000, PRADAN's leadership pool had 25 executives with over 7 years' experience. There are now more than 60. This growth is entirely attributable to the apprenticeship programme.

Challenges ahead

PRADAN is currently one of the largest non-government public service organisations in India, with a wide outreach in regions with high concentrations of poverty. It has the largest endowment of university-educated women and men working directly with poor families in the country. We have strong relationships with those we work with, both in villages

**Cooking food in
Khohra village, in
preparation for a
marriage.**



Photo: Vishal Jamkar

and in an array of public and private institutions concerned with poverty alleviation. We believe this is due to our human resource development and a mission-level belief in the simple idea that **people make a difference**.

PRADAN is at a unique juncture in its organisational life. We are now in a position to grow rapidly and expand our outreach. Realising this goal presents a number of key challenges. At this point, we need to:

- enlarge the pool of human resources available to the organisation;
- develop career trajectories for young people within PRADAN, and also in the 'mainstream';
- develop curricula, systems, and processes to enhance effectiveness; and
- enable experienced staff to play wider leadership roles.

Our aim is to scale up the 12-month long development apprenticeship programme so that 50 to 60 new executives join PRADAN each year. In addition, PRADAN needs to develop new recruitment and induction strategies to bring in 20 new executives with 1 to 5 years' work experience outside PRADAN, across all sectors. Not only would this add to the numbers, we believe it would add new dimensions to

our work and enhance our diversity.

Vishal Jamkar recounts his experiences as a PRADAN apprentice

I am a chemical engineer and after graduating I felt I wanted to use my technical knowledge for social purposes. This is how I decided to apply for a job in PRADAN.

I had no social and/or field experience. So I enrolled with PRADAN's one-year apprenticeship programme. During my apprenticeship, I first went for a month-long village stay.¹ I then went on to do a study of a new village (where PRADAN was yet to work). Finally, I feel I've learnt the nitty-gritty of the project through a guided practice.

I remember my village stay in Khohra at Manturiyabai's house (Manturiyabai is one of the self-help group members). For the first 3 days, I interacted with nobody except the family with whom I was staying. I used to shy away from approaching neighbours. Villagers were very curious to meet

¹ During the village stay, the newly inducted apprentice stays with a family in a community where PRADAN is already working. The Field Guide and Team Leader look for a suitable, willing host family for the apprentice and discuss the stay with the host family.

me. Being from Mumbai, the youngsters were very eager to ask me how films are shot, and how the romantic songs and scenes are filmed. I was more used to reading books about rural India than actually speaking with people from rural India. For me, the ice-breaker was a village marriage ceremony, where I helped to cook food and danced the *chitkor*, a tribal dance.

As part of my assignment, I had to find out the income-expenditure levels of a number of families. After my initial attempts, I realised the importance of asking open-ended questions. I had spent a sleepless night thinking I was not fit for the job. I couldn't ask questions, such a simple thing! I then realised that I had become assignment-focused, manipulating data, as I used to do in my engineering laboratory. Some time later, when I became genuinely interested in people's lives and not just their incomes and expenditures, everything became easier. I found I could complete my assignment and enjoy the remaining time there.

I remember once talking with a few villagers at Shyam-

vatibai's house; I was 'lecturing' them on why they should have sent their children to school rather than sending them to collect *mahua* and feeding cattle. I repeated it three times, with a tone of superiority as if I was a graduate and knew all the advantages of it. Everyone went quiet and began to avoid looking at me. I could not understand why they were behaving like this. Then Mangat bhayya, Shyamvatibai's husband, replied silently,

Brother, we don't have or are able to get enough food here; what we can cultivate from agriculture is not enough to cook our meals for a whole year. We have to migrate to other places to earn, taking all our belongings with us. So first of all, let our food requirements be met, and then we will think of education.

This incident is embossed on my memory. I was petrified. Nothing taught me as much as this event did. I realised then that I can never say I know it all.

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How SRIJAN uses immersions as part of its recruitment process

by RAJ KUMAR and HARIDARKEE

SRIJAN (Self-Reliant Initiative through Joint Action) arranges an overnight stay in a village for its prospective employees as a way of assessing their commitment to working in a rural environment. Once appointed, a two-week stay in a village during their orientation helps to deepen their understanding of rural life.

Introduction

SRIJAN (Self-Reliant Initiative through Joint Action) is an organisation of techno-managerial professionals, which includes social workers, agricultural engineers, computer engineers, management graduates, and agriculture graduates. SRIJAN aims to promote strong, self-reliant people's organisations and enterprises. It aims to enhance people's access to natural resources and markets as well as their capacity to manage them in a sustainable manner. SRIJAN collaborates with Government, the private sector, and other civil society organisations as a strategy to promote the interests and rights of scheduled castes and tribes, and poor women and men, and create space for their organisations in government planning and implementation.¹ The ultimate impact we wish to see is a sustained increase in the incomes

of the rural poor.

Although registered in 2000, SRIJAN has been operational since April 1997. It has projects in several sectors, such as water, rural poverty reduction, and biomass energy. SRIJAN has recently been expanding its presence in the locations where it currently works, as well as its theme-based programmes in water resource management and market-led livelihood businesses. This means that we need more staff to work with us. We look for people who can toil hard in the tough terrain of rural India, engage themselves with the poorest, understand their needs, and think of innovative solutions. We need people who can apply their technical skills of mobilisation, engineering, and management to work out solutions to rural problems. Our staff also need an intrinsic drive to work with the rural poor – and this often comes at the cost of living a better (comparatively luxurious for them) life.

We follow a well-defined procedure for recruitment, which includes several steps. First of all, an ad hoc team of SRIJAN staff members contact and arrange visits to some of the most renowned institutes and universities connected to

¹ Scheduled Castes (*Dalits*) and Scheduled Tribes (*Adivasis*) are Indian communities accorded a special constitutional status because of their social and economic conditions.

**Capacity building
for trainees.**

Photo: SRIJAN

SRIJAN sectors of intervention. Students are briefed on the organisation (its objectives and activities). Then, those interested in applying undergo specific tests and group exercises. A final interview follows and the pre-selected candidates are invited to a field visit of 1 to 2 days, which includes an overnight stay in a village.

For SRIJAN, this is a chance to consider candidates' predisposition and approach to working in a rural environment. For urban youngsters, their idea of rural life is often limited to what they know through Hindi movies. Even candidates with a rural background may discover that changes have occurred since they left their villages to study, so the stay in the village is a valuable part of the selection process.

This experience – intended to orient people on their career choice – leads to further selection. This is either because candidates themselves voluntarily withdraw or because SRIJAN's local field team recommend that they do so. It is a reality check for all.

The remaining candidates undergo an induction-cum-orientation programme. During this time, they get more acquainted with SRIJAN's philosophy and its approach and interventions by interacting with senior professionals. They also experience some of the main development issues.

Field exposure visits

As part of the induction-orientation programme, newcomers are assigned to different field teams and leave for a second village stay of 15 days. This is intended to deepen their understanding of rural dimensions – such as people, culture, social structures, power dynamics – as well as SRIJAN interventions. Each junior member of staff is supported by a mentor/field guide throughout the field stay.

Usually, a task is assigned which varies depending on the local context. An example is finding out the various government institutions working in a given village and the villagers' level of satisfaction with them. For this purpose, too, junior professionals are encouraged to maintain a daily field diary to record their thoughts and observations at the end of the day.

The new staff stay with families which the local team have identified in advance. Families are selected from the poorest sections of the community, usually scheduled castes and scheduled tribes. The guests are expected to contribute to the costs of their stay and, since villagers normally do not accept cash, they usually purchase vegetables and other important items. We explain to the host family that the stay is meant to enhance the professional's understanding of their village. We explain that the person is visiting to find out more about them

– and this is possible only by staying with them.

What the host families feel about the village stay really depends on SRIJAN's interventions there, and the level of interaction that SRIJAN staff have with the villagers. Where SRIJAN has been working in an area for some time, people have a better understanding of the reason for the visit. In new villages, even though we tell them the same thing, at times we are unable to prevent a certain amount of expectation by the villagers that the guest will recommend some benefits for the poor. Over the period of the visit, though, we find that such expectations are reduced.

Mentors introduce the guests to their respective host families. Afterwards, it is up to each guest to establish rapport with the host family and decide about his/her schedule (who to meet and what places to visit). This is so that the junior professionals are not dependent on their facilitator/mentor for answering any questions. What is most important for us in SRIJAN is not how much newcomers learn, but rather how they approach rural life and rural people. Nonetheless, mentors pay frequent visits to them to discuss issues and problems faced.

Sharing experiences

At the end of the 15 days, the junior professionals come back to the field office and present their experiences to the rest of the team. They are also encouraged to report on their assignment and field observations, which are later shared with all staff members by email. This last document is not for evaluation purposes; it is rather meant to understand new junior professionals' perspectives, their areas of professional interest, and their approach to field issues.

Neither the stay nor the report is intended to be research contributing to SRIJAN's work. Primarily, the intended benefit is to enhance that person's understanding of the village and the rural context. However, when the junior executive goes to stay in a new village where SRIJAN is not already working, we do make use of the data and information gathered. Mostly, this is not structured research. Instead, the junior executives are encouraged to live the experience, such as working in the fields with the villagers. There are no special meetings with the villagers and so the villagers do not have to spend extra time talking to the professional.

Generally, we have observed that this field exposure generates a lot of excitement amongst our new recruits, and in many cases sets their future career direction. However, this learning process is not without difficulties and challenges. Young professionals, especially those who have never lived in villages before, may become very apprehensive when

informed about the field stay (see Haridarkee's account later in this article). The language barrier, for example, may constitute a problem for them, at least initially. But once they realise that there are other ways to communicate, they start relaxing and enjoy the immersion experience fully.

Challenges ahead

Currently, while the recruitment and selection process is well documented and systematic, the immersion experiences (initial field visits, orientation/induction, and the subsequent field stays) are not. Very often, field exposures are arranged according to the need of the moment once the recruitment and selection process is over.

In light of this, SRIJAN plans to critically review the entire system, streamlining the immersion components. As part of this review, SRIJAN will extend the duration of the initial village stay to 3 days (as Haridarkee and others have suggested – see below) and introduce a feedback system to improve the entire process.

At SRIJAN, we believe that these forms of exposure and learning are very effective. Therefore, we intend to institutionalise it and document as the Immersion Programme in SRIJAN.

Haridarkee reflects on his field exposure visit with SRIJAN

When SRIJAN came to OUAT (College of Agriculture) during a recruitment drive, I was among the people shortlisted. We were later informed about a field exposure in Madhya Pradesh (MP). I was not sure I wanted to take part. But I thought about it for 3 days and finally decided to go.

When I travelled to Madhya Pradesh, I still had a lot of doubts and questions about the village, its environment, and whether there would be any correlation between my educational knowledge and the type of activities planned for that village. I was a little bit tense as I would get no answers until I reached the designated location.

Despite some difficulties in locating the SRIJAN office in Jaisinagar (MP), I finally reached it and met with some of the team members who briefed us on what to do in the village. They told us that we had to conduct a study, document it, and share it with the team afterwards.

Then I discovered that I had to go to Kharmou village and stay there overnight. When I heard this, I became nervous, thinking about the night stay. I had never had such an experience before, so I was rather hesitant. Still, I went to Kharmou with Ravi (a SRIJAN staff member). Several times on the way, I thought about getting down from the bike and going back, as I also didn't know the language spoken in

**Trainees
interacting with
the community.**

Photo: SRIJAN

that area (Bundelkhandi). Moreover, although I had been told that the road was one of the best, the journey turned out to be very painful, at least for me.

After 45 minutes, we reached Kharmou and met with Prem Bheru's family. When Ravi left to go back to the office, I felt as if I was in an unknown world where nobody knew me and vice versa. As I said, I could not understand their language. Therefore, for one hour, I kept silent, just looking here and there. Later, Prem, (the eldest son of the family and the only Hindi speaker) joined us. He told me not to worry because he would help me throughout the whole process. Only then did I begin to feel a bit more relaxed and could start answering villagers' questions about me and my village.

Next, I visited the village with Prem. We went to the dairy and met with two members of the self-help group. I was unable to understand them properly, but I still felt good talking to them. Within a few hours, I was very much familiar with all villagers and also asked some questions about their village and traditions. This was a very interesting experience and helped me to review my previous opinion about the village and its inhabitants.

Afterwards, Prem and I went back home and had dinner together. I noticed that some of the family members were laughing at me, so I asked why, and discovered that my

different way of talking and behaving was funny to them. After dinner, we listened to some excellent music.

On the next day, I encouraged the villagers to draw their village map.² Their participation in this exercise was very lively. It is exactly because of their level of interest and their willingness to take part that I decided to join this sector.

After this induction programme, I changed in my attitude towards villagers and rural realities. Because of this, I now really think such kinds of experiences are very much necessary, especially before joining the development sector.

Some modifications to the programme could actually make it more effective in my opinion:

- The exposure should last for a minimum of 2 to 3 days. In one day it is very difficult to get a clear picture of the village.
- The field stay should be followed by a discussion with some senior staff about the village, the type of work proposed, and any potential constraints. This would make it easier for a new recruit to decide whether or not to join the organisation and prepare them for a long-term commitment.

² While the assignment is usually to identify poor families, the methodology used is not structured and is left to the participant.

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How SEWA uses Exposure and Dialogue Programmes for internal capacity building

by POONAM SHROFF

As we saw in Section 1, The Self Employed Women's Association (SEWA) has been a key player in the history of immersions. It has been hosting EDPs for the staff of other organisations since 1991, but in 1998 started organising them for its own internal purposes as well. SEWA regards EDPs as a reality check – a way of keeping the movement rooted in the lives of its women members, and of monitoring the impact of its work by assessing changes in those women's lives.

Internal EDPs at SEWA

The Self-Employed Women's Association (SEWA) has over a decade of experience hosting Exposure and Dialogue Programmes (EDPs). The programmes are organised for staff from development agencies and government officials, as well as for academics. SEWA conducted its first Exposure Dialogue Programme (EDP) in 1991 for participants from Germany.

In 1999, SEWA began using EDPs internally. Staying with members and learning from them about their daily life and needs is, in SEWA's experience, a powerful means of keeping the movement rooted in the women's life cycle needs. It is an opportunity for SEWA staff to get to know their members,

appreciate their strengths, and understand the strategies they use to overcome problems.

It is a principle at SEWA that its organisers are mainly recruited from its membership. As a result, 80% of SEWA's organisers are from the cadre of grassroots members and only 20% have professional backgrounds. SEWA provides its grassroots leaders with intensive training to enable them to take on roles which require professional skills. For instance, the present general secretary of SEWA was a tobacco worker and a member of SEWA.

Those organisers who were once simply members have lived in poverty and know very well what it is. SEWA professionals, on the other hand, are unlikely to have experienced poverty, although they voluntarily share part of this poverty by working with SEWA and by accepting lower remuneration.

We have found EDPs to be a very useful way of getting members, grassroots leaders, and professionals to know each other. The EDPs help to deepen relationships at all levels of the organisation: members, organisers, staff (old and new), management, and leaders.

SEWA is also expanding its membership rapidly, both geographically and activity-wise. So regular capacity building has become essential for members and staff.

What happens during internal EDPs?

Internal EDPs are held once a year. They are specifically geared towards our district-level coordinators, new and young organisers, and those in responsible positions. Each host (a SEWA member) accommodates two participants (SEWA staff members), accompanied by a facilitator (a senior SEWA staff member).

During the EDP, a SEWA staff member attempts to engage with the life of a member. Rather than trying to kindle some kind of change, or follow her own agenda or work plan as she would for a field visit, she instead conforms to the member's agenda and work plan. The aim is to observe and understand, not to motivate change or action on the member's part.

Through the EDP, a staff member can take a step back from her typical role of organiser and, instead, focus on learning from the member – her life story, what keeps her in poverty, and what she is doing to cope with and move out of poverty. The EDP is a moment for them to try to understand the environment and conditions they are seeking to change, in a more holistic manner. The process can act as a reality check or update of their understanding of members' situations and the strategies for poverty reduction they are promoting. EDPs are also a means of identifying new strategies that emerge from members themselves.

Impact of EDPs

SEWA's experience has shown that EDPs are a useful tool for its own staff members who regularly work at the grassroots level. The experience of living with a SEWA member for 2 or 3 days observing her daily life and walking in her footsteps for a short while brings SEWA's staff closer in touch with their members. It helps them to build and strengthen personal relationships with members, which ultimately makes them more aware of and responsive to members' needs and demands. It helps them to understand their members' goals and provides a personalised frame of reference for their work.

The EDP also allows staff to gain a broader picture of the condition of the poor and impact of their work beyond the framework of a specific activity or project. The EDP takes the staff member out of her sphere of activity and broadens her

“It [the EDP] is an opportunity for SEWA staff to get to know their members, appreciate their strengths, and understand the strategies they use to overcome problems.”

perspective by revealing all aspects of poverty that the member experiences in her life. When staff members make field visits, they are focused on the progress and impact of the particular activity on which they are working. During the EDP, the facilitator is not making a targeted field visit but is rather looking holistically at the life of one individual member and the impact on her life of the interplay of the multiple interventions of SEWA, and how each activity impacts and relates to the others.

Working with SEWA and primarily for its poor members is difficult. Professionals may find it even more difficult as they have to accept a low remuneration and forego the luxury of corporate environment. At times, frustration prevails among the staff. However, these internal EDPs help in motivating the staff and making them more optimistic about their work. EDPs also provide a means of building teams and ensuring effective team work. Staff discover how to work together for the benefit of the members.

EDPs also allow SEWA organisers to plan activities better. For example, after having participated in an EDP and seen the day-to-day activities of members, the district teams decided to avoid meetings or trainings for members during the peak season of salt mining or agriculture as this is a hindrance to their work.

When used regularly, the EDP can serve as a qualitative performance assessment and progress check for SEWA, too. Through the EDP, SEWA staff can assess the impact of their work through the eyes of their members – to whom they are ultimately accountable. By living with a member for 2 or 3 days, SEWA staff can assess changes in the life conditions of that member, jointly, and provide a qualitative measure of performance. This in turn can shape a realignment of goals and priorities as necessary to remain continually responsive to the situation and needs of members.

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The Global Journey: a quest for reality

by BOSSE KRAMSJO

Regular 'Global Journeys' provide opportunities for groups of Swedish teachers and educational professionals to spend an intense period of time in a developing country. This equips them to promote sustainable development issues in their teaching. The visits are part of a structured process of learning, planned a year in advance and evaluated 4 months later. They include space to discuss how to translate the experience into professional practice on return.

About Global Journeys

The Global School is a collaboration between two Swedish government authorities, Sida and the International Programme Office for Education and Training. The aim of the Global School is to provide educational staff of all departments with relevant further training on vital global issues. This should enable them to promote issues related to sustainable development in their teaching. More than 100 global education seminars are organised every year, all over the country.

Another central part is the Global Journey. Annually, six Global Journeys are carried out in different countries. Each journey lasts around 18 days and has between 20 and 25

participants. People are recruited twice a year for three destinations at a time.

Usually, teams consist of at least three persons from the same educational unit, one headmaster and two teachers. However, cooperation between schools from the same locality is also promoted. So is the participation of local government councillors and administrators, chief educational officers, and representatives from the local education authority/board. Therefore, the team composition may sometimes be more heterogeneous, including headmaster, teachers from several educational levels, municipal decision makers, and councillors from different municipalities. A Global Journey generally involves five or six diverse teams.

Teams are recruited almost a year ahead of the journey. They are provided with some basic course books/recommendations along with two to three compulsory, preparatory 2-day seminars. The orientation includes lectures, group discussions, and practical information. Lectures, for example, focus on development perspectives, opportunities offered by meeting different cultures, and subjects related to the country/region of visit. In the first meeting, participants form interest groups of three to five members. These interest groups plan and then perform their study tasks in the field. These studies are not of an academic nature – they are only

“Participatory sharing of information is vital – it is just as interesting for the host villagers to hear about the foreign guests’ family situation, concerns, problems, attitudes, and values (and crops!) as the opposite.”

working tools for a deeper understanding of the local culture and people’s life standards. Studies on attitudes and local values are particularly encouraged.

The Global Journeys are led by people with considerable experience of internationalisation in schools. They also have a great deal of knowledge and experience in the field of development cooperation. Similarly, in each country, local partners/organisations and interpreters/resource persons ensure the quality and professionalism of the programme.

The field studies vary somewhat depending on the destination. However, some points are similar for all Global Journeys:

- a study in the field is performed in interest groups, with the support of interpreters/resource persons;
- participants have the chance to live with families, providing them with an opportunity to experience people’s everyday life; and
- regular, joint seminars provide an opportunity for follow-up and the scope for discussions and exchange of experience.

Global Journeys in Bangladesh

Once a year, a Global Journey is organised in Bangladesh. Participants are encouraged to stay with a rural family for 10 days. Field workers of our partner organisation, Proshika, select suitable member families. Hosts are usually mid-poor families, not the poorest. However, relatively wealthy local families are disqualified. New host families are selected for every new Global Journey.

Before the arrival of the Global Journey teams, organisers visit the families and discuss sensitive issues with them (e.g. whether they prefer female or male guests). They try their best to match the interest groups with each and every family based on the circumstances.

An interest group of five members, three women and two men, will live with two different families within walking distance of each other. One household is for the three female participants and another household for the two men. Due to the local culture and space limitations, sexes are never mixed.

There have to be decent toilet and bath facilities. Organisers sometimes provide a new bamboo mat to enable participants to take a bucket bath in privacy. Another common point of discussion with the family members is where they will sleep once the foreign guests and their interpreter/resource person are offered the biggest bed. Two participants usually share a big bed. If extra bedding or mosquito netting is needed, it is provided by the local Proshika office. Proshika is paid and organises good food for everyone – this is the only payment for the hosts.

Rules for participants are few and simple:

- no alcohol in the community;
- no prospect of adoption of children; and
- no disbursement of money.

Orientation: days 1 and 2

Upon arrival, participants are hosted at the Proshika training camp in Koitta, some 50km west of Dhaka. Facilities are simple but good. Getting used to simplicity and room sharing is one of the aims. Given the long trip, in the first day only a few preliminary activities are scheduled as part of the field orientation, including:

- introductions to interpreters/resource persons;
- an orientation to the local surroundings;
- discussion/planning of interest groups with interpreters; and
- learning basic Bangla.

The second day is mainly devoted to seminars on development and poverty issues. Participants as well as interpreters are briefed on the aim of the field study.

Staying in the village

On the morning of the third day, participants leave for their villages with some basic information about ‘their’ families. They are spread out in surrounding villages, never more than half an hour away by car. If the location is nearby, they will travel by auto-rickshaw, otherwise by minibus. Interpreters/resource persons (one for every two or three participants) accompany teams throughout the whole exposure and are equipped with mobile phones in case communication is needed.

Participants are then left ‘on their own’ for about 2 days. On the evening of the second day or the morning of the third day, organisers visit them. It is important that participants get the time to settle and become confident with their new environment. When organisers come, they are guests. By the third day, participants are usually referring to ‘my’ or ‘our’ family and village. The long stay, nights included, and the continuous presence of the facilitators/resource persons are

the aspects most appreciated by participants. They are keen to talk about their experiences. Practical matters are sorted out. Teams unfold their study plans, always respecting the local culture and habits.

Participatory sharing of information is vital – it is just as interesting for the host villagers to hear about the foreign guests' family situation, concerns, problems, attitudes, and values (and crops!) as the opposite. We suggest that participants slow down, walk around looking and listening, follow the rhythm of the local life style, sit down and gossip over a cup of chai, ask when they do not understand, and ask again. If they want to, they can take part in household and farming duties, e.g. learning how to prepare Bangla cuisine dishes.

It is also important to make time for reflection. Participants are encouraged to note down their impressions, thoughts, and findings in a diary, and to write about those whose stories catch their hearts and minds. The exposure is tough, hence the strong need for reflection in which interpreters/resource persons/facilitators have to take part, too.

Exchanging experiences

After 6 to 7 days, there is a reunion to exchange experiences. Exposure and sharing often give ideas on how to proceed and what must not be forgotten before leaving families. The reunion also provides an opportunity for school groups to sit together and discuss issues (e.g. colleagues talk about how to translate this experience in professional terms once back home/planning for the future). Another minor reunion is organised after the final departure from families.

The rest of the programme has a mainly study-trip character: a day in Dhaka to see the garment sector and how urban people live, and a trip to Thanapara Swallows, Rajshahi to see the Ganges river and beautiful rural landscapes, but also an area where there is contamination of drinking water with arsenic.

Follow-up seminar

Around 4 months later, organisers call for a 2-day follow-up seminar. Evaluations and further sharing take place, from which it usually emerges that staying with families is the main strength of the Global Journey to Bangladesh. Participants are

moved, touched, and affected. They don't feel pity; they miss friends they will probably never meet again. They learn a lot through questions, gossip, and discussions with villagers in Bangladesh. Not least, they learn about themselves and their own culture. Alien and exotic poor people of rural villages in far-off Bangladesh have become close and understandable. This emotional part is very important, although some might dismiss it as 'software nonsense'. Without emotional involvement, how can thinking and intellectual shifts happen? Without shifts in the thinking of the individual, how can there be shifts in her/his professional performance?

Final thoughts

In terms of challenges, the availability of good interpreters/resource persons is definitely one. Language is not the only critical issue; the right attitude and respectful behaviour are also vital in such rural environments. Often, because they are well educated and born in cities, interpreters carry with them 'bags' full of contempt towards the villagers. This will have a strong impact on the visitors' experience, given that almost everything is filtered through interpreters. Interpreters play a key role in developing mutual understanding between visitors and locals, and their mindset, interests, motivation, and behaviour are of utmost importance. Poor interpreters limit the success of the visit and therefore the overall purpose of the Global Journey.

Another constraint is time. The journey only lasts 18 days, including international and local travels. Initially, I was very sceptical about it. I wondered what visitors could learn in a few days in a village when I had spent more than 10 years working in and learning about rural areas of Bangladesh. I was afraid it could simply become a more sophisticated form of development tourism. However, although there are these limits, I am quite impressed with outcomes.

Visitors do learn and gain a lot from these experiences, which they retain for a long time. The friendly social environment and rural lifestyle facilitate the learning process, encouraging guests to open up their minds. They cannot escape from reflecting on and questioning their own lives and lifestyles. They cannot escape being impressed by their hosts' energy, lives, and thinking.

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Section 4

Part II: Programme development and accountability

The four articles in Part 2 illustrate different ways in which NGOs and donors are using immersions to strengthen the quality of the programmes they run and their accountability to those they serve.

The first article, by **HAIDER W YAQUB** and **SAIFUL ISLAM**, describes how Plan Bangladesh uses immersions throughout the project cycle – but most critically in the planning phase – to build relationships with the communities where it works. The next article, by **DEE JUPP**, captures captures the experience of the Swiss Agency for Development and Cooperation (SDC) during a four-week participatory research study in Tanzania. The resulting report, 'Views of the poor,' highlighted the need to create space for the views of the clients of development programmes, which are less often heard. In the next article, **QAZI AZMAT ISA**, World Bank's Senior Community Development Specialist in Pakistan, describes how informal but regular meetings in the homes of PPAF clients have become an essential and valued part of the project's monitoring system. And in the fourth and final article, **ASHISH SHAH** describes how one ActionAid team is using 'reality checks' to strengthen its own practice, linked to ActionAid's annual process of participatory review and reflection. 'Reality checks' are internal to ActionAid, and so differ from the approach described by Sonya Ruparel in Section 1 in which ActionAid offices and partners facilitate immersions on behalf of others.

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Using immersions for programme development at Plan Bangladesh

by HAIDER W YAQUB and SAIFUL ISLAM

Plan Bangladesh uses immersions throughout the project cycle – but most critically in the planning phase – to build relationships with the communities where it works. Regular ‘home stays’ deepen staff understanding of the environment in which they are intervening and reaffirm their commitment to participatory social change. In addition, all Plan staff – regardless of their role or level of responsibility – are encouraged to undergo an immersion as part of their induction and orientation.

Bangladesh is one of 66 countries where Plan works. Its operations in Bangladesh started in 1994 and it has developed programmes in the areas of education, health, environment, and livelihoods. These programmes are based on the principle that children, women, and men can lead their development process.

In order to put theory into practice, Plan developed the child-centred community development approach (CCCD). This approach hinges on:

- the facilitation of participatory processes;
- building partnerships and alliances;
- supporting groups and organisations;
- scaling up child-centred programmes; and

- working with civil society to encourage recognition of and respect for children’s rights.

Plan Bangladesh uses immersions as a key work process in its child-centred community development approach (CCCD). All new Plan and partner staff in Plan’s seven programme units receive thorough training on CCCD and are required to do an immersion.¹

The structure of a Plan immersion

Before starting development work in any community, Plan’s staff and partners undergo an immersion process. Through this, they can meet with and understand the community, and the community gets an opportunity to understand and familiarise themselves with the organisation.

Plan staff members begin the immersion process by introducing themselves to local community leaders. As the community comes to know the staff member more intimately, they also come to understand Plan Bangladesh as an organisation with a vision and mission. Reasons for visiting the village are explained and, after a few meetings, Plan staff members gain the confidence and trust of the

¹ Each programme has, on average, six partners. Each partner has six staff members working with the programme.

Children of a village primary school spend time engaged in cultural activities during their break.



Photo: Plan Bangladesh

community. In this sense, an immersion is a process of building relationships with the communities where Plan Bangladesh intends to work. This relationship includes not just the traditional leaders, but also the larger community, especially children and other relevant groups.

Plan and its partners then seek to develop a common understanding with the community, including the following aspects:

- the community's values;
- ways people perceive their realities;
- dynamics that exist among members of the community;
- power relationships and gender roles;
- cultural practices;
- local taboos;
- children's workload and interests;
- family diet, economic status, and their effects on children's health, learning, and recreation;
- history of past interventions with the community;
- defecation and hygiene practices; and
- indigenous knowledge and practice.

'Home stay' immersions – staying in the community with a host family for a few days – are an important part of developing this understanding. There are two main aspects to a 'home stay' immersion.

- **Selection of the host family.** The host families selected reflect the characteristics of the target groups Plan aims to work with. Using participatory wealth ranking with children, the area households are categorised into five categories. The poorest of the poor cover around 7%; the largest number of host family households comes from the category above that. They are more representative of the people that we aim to work with, and we usually prefer a home stay at one of their residences. This does not mean we avoid the poorest, and some staff members prefer to have their home stay with the poorest families.
- **Duration of the stay.** Usually, the duration of a home stay is 2 to 3 days. This helps to ensure that the visitors have an opportunity to experience the complete cycle of the family's daily chores. They should have ample opportunity to observe children's, women's, and marginalised people's daily activities and routines.

During the immersion, each Plan and partner staff member behaves as a learner who wants to understand and learn from the community's discourse. Plan and partner staff members also strive to develop a deeper and meaningful relationship with the villagers. As staff of a child-centred organisation, they are especially encouraged to develop rapport with poor girls, boys, and their families so that their aspira-

Children engaged in family operated cottage industry, making goods out of cane. During the home stay, one child shows a staff member how he works.



Photo: Plan Bangladesh

tions are reflected in future development undertakings.

Under no circumstances should Plan staff judge people in the village, based on their personal standards. All understanding and learning has to be based on the contextual reality, which may be clearer after reflecting with community elders and other development partners. During a Plan immersion, staff members are oriented to maintain good humour and be respectful of elders, poor people, and children. An immersion is an excellent time for establishing contact and building rapport with the key development players of the village.

Immersion as a process

It is important to realise that an immersion does not stop at the planning phase. It is, in fact, a continuous and vital process that continues with the project cycle.

Staff members need to have an understanding of the community's problems, identify their causes, crosscheck, and compare. These include:

- land patterns;
- occupations;
- sources of income;
- people's daily routines; and
- aspirations of the community.

Figure 1: CCCD Working process cycle



They also need to:

- identify potential participants and their availability in terms of time;
- learn about culture, values, and norms; and, most importantly,
- build relationships with children and their communities.

Local children and women in a new village where Plan will work are being introduced to our staff.



Photo: Plan Bangladesh

Because of this, immersions and reflection are practised throughout each project phase of re-planning, implementation, monitoring, and evaluation. For some of these stages, a home stay may not be the most effective method of immersion. However, having immersions throughout the project cycle gives our staff a deeper understanding of the issues. It enables them to develop more appropriate strategies, implement methodologies, and build a community's capacity to take ownership of the development process.

An immersion is not a one-off event. It is a time-consuming process during which staff pay numerous visits to the community at different times and for varying lengths of time. There are home visits and continuous daily visits at the beginning, and regular/routine visits later on. However, the immersion at the planning phase of Plan's CCCD framework is the most critical. The first phase is the period in which the foundations of the community's work are laid. Therefore, using the home stay as an immersion methodology is preferred at this stage.

Immersion techniques

During the immersion process, staff members are encour-

aged to maintain a journal for capturing insights about the following community aspects:

- marginalised groups and their issues;
- children's interest and child rights issues;
- adult-child and child-child relationships, and family power dynamics;
- power dynamics at the community and household level, kinship and boundary relationships;
- general cultural practices, taboos, etc.;
- key resources available and their distribution; and
- organised groups in the area for social action, their understanding, education, and ability.

Staff members take notes, but do so in a discreet manner so that people don't feel uncomfortable and continue to talk openly. Plan staff members are trained in various immersion techniques that can help this experience to be more effective. Techniques include rapport building with communities through:

- informal conversations;
- door-to-door visits;
- discussions at tea stalls;
- focus group discussions;
- discreet note-taking;

During their immersion, Plan staff members talk with the children in the village.



Photo: Plan Bangladesh

- interacting with local elites to understand power structures;
- talking to key informants; and
- participating in different social events.

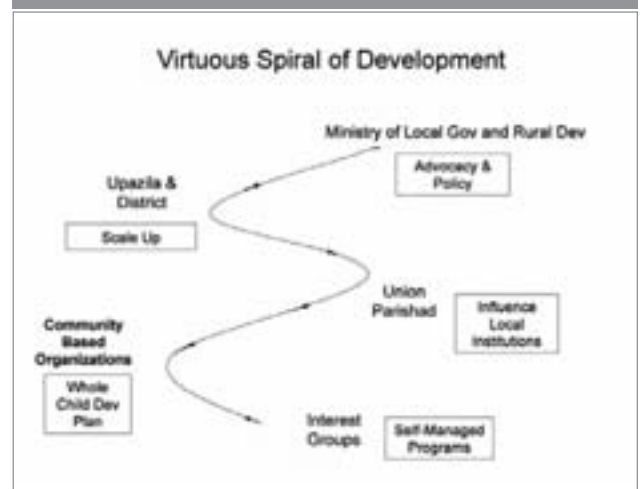
Reasons for having immersions

An immersion builds relationships between the organisation staff and the villagers. It develops mutual trust and respect. Through this process, Plan staff members gain an understanding of the community’s values, the ways people perceive their realities, and the power dynamics that exist among members of the community, before any external intervention is undertaken.

Staff members are able to observe how people work in the community or in a household. Interesting observations can be made on gender roles, who does what, how children do their homework, what chores are done by girls and boys, what kind of entertainment they have, who eats first and what is left for the last to eat, where people go for defecation, and what their hygiene habits are.

Immersion provide Plan staff members with invaluable insights about the community. This helps to develop more effective programmes, which address the practical

Figure 2: Virtuous spiral of development



and strategic needs of the target population and children. They are particularly important prior to programme planning and implementation, but are also used throughout the project cycle.

Immersion really help to motivate and reaffirm commitment among staff members to promote social

changes, in which the participation of the marginalised population is emphasised. They also provide an opportunity to develop a profound understanding of people's perceptions about their conditions. This deeper understanding helps Plan staff to engage villagers in forming their own village organisations and provide support to the village's own development plan, in which the community aspirations are reflected and children's needs addressed.

Equally, through immersions, Plan Bangladesh creates a link between community and local development agencies so that the latter can also play a role in the implementation of the village's development plan.

Conclusion

Immersions are a vital part of Plan's work and approach. They provide staff members with a deeper understanding of development work and help them better understand their constituents. All staff, irrespective of their role and responsibility, are encouraged to undergo an immersion. As part of induction/orientation, new staff members have to undergo child-centred community development training, of which immersions are a critical component.

Regional team members and other visitors are also encouraged to do immersions during their visits to other programme countries.

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Views of the Poor

by DEE JUPP

In 2002 the Swiss Agency for Development and Cooperation (SDC) in Tanzania commissioned a four-week participatory research study in Morogoro region, its main area of operation. The aim was to deepen SDC staff and partners' understanding of the lives of the poor and to inform the process of reformulating its country strategy. The experience turned out to be transformational for many of those who took part, giving a wealth of insights into the lives of the poor, and exposing the often hidden nature of poverty. The study had a significant impact on the Tanzania country strategy, and the way it was monitored and evaluated.

Background

The 'Views of the Poor' Study was organised by the Swiss Agency for Development and Cooperation, Tanzania, in late 2002. Its aim was to assist in strengthening the poverty focus of its new Country Programme. One of the ways it achieved this was to put some of its staff, as well as staff of development partners, through a brief village immersion process as researchers.

The intention of involving staff was twofold:

- to orient them to the current realities of rural poverty; and
- to gather first-hand insights into the range of experiences of poor households to contribute to policy formulation and programme design.

The study was also designed to explore diversity and individual experience rather than the more common focus group approach. This tends towards consensus seeking and generalised views, often 'sanitised' for public airing.

Design considerations

Involving development agency staff in the research exercise imposed a number of time constraints. Furthermore, although all the staff were comfortable with field visits, few had spent time actually working at village level. The following are some design decisions made to mitigate these constraints:

- Provide staff with depth of experience rather than breadth. It was decided to immerse each member of staff in day-long interactions with only two households each. They were to live with the family through a normal day, helping them in their daily chores, assisting with cultivation, eating with them, and resting with them.
- Focus on the household. The household is an easily identifiable unit. No special facilitation skills would be needed as are required to conduct public workshops or focus

“Most [households] felt that talking with outsiders had been very useful as they had been able to think through things and some had even gained direct information ... Most had never been asked their opinion before, and few would have attended a public forum.”

group discussions. Good interaction with the household would depend on appropriate attitudes and behaviours rather than special communication skills.

- Emphasise the use of visual tools. Disposable cameras were to be given to each household to take pictures of the things they liked and disliked about their lives. Household members were to be encouraged to draw pictures and diagrams to share their experiences and aspirations. This would enable them to assume more control and minimise the need for expert facilitation skills and/or interference from the staff.
- Provide mentors. The staff would work with a household in pairs and have a mentor who was an experienced participatory researcher. The mentor did not accompany them to the household but was able to give advice following the rapport building introductions and helped to debrief in the evenings. Immersion experiences can create very profound emotional responses, which need careful support.
- Ensure that there were benefits for the households too. Each household was given a bag of food items. The extra pair of hands was expected to make a real contribution to cultivation. Interactions with households should be ‘chats’ rather than interviews, and householders would choose the areas they wanted to talk about. The households would each receive an album after the study containing the photographs they took which would include family portraits.

Carrying out the study

Each staff member co-opted to the research team spent 6.5 days away from their work. This time included their orientation, time spent with households, debriefing, and a final reflection workshop.

The researchers spent between 8 and 10 hours with each household, arriving soon after the household had finished getting ready for the day. They helped with collect-

ing water, cultivating the *shamba* (small farm), collecting firewood, lighting fires, and preparing food. This had several objectives:

- to ensure that the normal routine would be minimally disturbed;
- to build trust and rapport; and
- to provide researchers with first-hand experience of some of the hardships faced on a daily basis by the households as well as providing tangible assistance.

Households were asked what they felt they had gained from the day. Most felt that talking with outsiders had been very useful as they had been able to think through things and some had even gained direct information (e.g. the family which did not know that schooling was now free, families which did not know they were entitled to free or subsidised medicines). Most had never been asked their opinion before, and few would have attended a public forum. They appreciated that the researchers ‘came to us’ and they did not have to go anywhere and ‘waste time’.

Researchers were encouraged to manage as far as possible without taking notes. The idea was to enhance the possibility of free-flowing conversation. Nor did they write reports: instead, each pair was de-briefed by the team leader while still in the field.

Results

The outcomes of the exercise were extraordinary. Not only was a wealth of insights into the life of poor households gathered, but the experience turned out to be transformational for many of the research team.

I thought I knew about village life as my roots are in the village and I still visit family in my village from time to time. But I know nothing about what it is like to be poor and how hidden this kind of poverty can be.

I could not believe that the family only had one broken hoe to cultivate with. It was like trying to dig with a teaspoon. I will never forget that.

We heard the untold stories. It was an eye opener as families shared their problems which would never be aired in group meetings. They treated us like confidantes.

Members of the research community also acknowledged value in this approach, both as a means to contextualise the voice of poor people and thus a useful supplement to more conventional research, and an important bridge between

Box 1: Extracts from the study report

I never go to the village meetings. I do not feel welcome.
Elderly woman, Lungongole village

I never go to community meetings because I am too busy either at the shamba or weaving mats.
Elderly man, Morogoro town

I rarely have time to go to village meetings.
Farmer, Mgeta village

The study team was shocked to visit households where there was no furniture at all as illustrated in these remarks during feedback sessions:

We were invited to sit on a pile of firewood which was hastily covered with a fertiliser bag as there were no chairs.

The whole family sleeps on the mud floor.

Householders themselves commented on their lack of assets:

I do not like having no money. I do not have a bed, a chair, an axe – nothing. I feel ashamed.
Father of four, Mgeta village.

theory and reality for staff of development agencies. The consensus following presentations to senior development officers in Berne was that this study was an 'eye opener' and, 'so much more meaningful and real than the statistics and academic studies we are usually subjected to'.

There is no doubt that the fact that several of SDC's staff had been involved in the study conferred a sense of ownership of the Country Programme design and an enhanced shared understanding of poverty. The quotations and pictures from the study, which are inserted throughout the main Country Programme document, serve constantly to remind the reader that special efforts are required to reach the poorest and take their views into account (see Box 1). The monitoring system for the new Country Programme draws extensively on approaches used in the study, which are also used to carry out 'reality checks' of programme impact.

"The outcomes of the exercise were extraordinary. Not only was a wealth of insights into the life of poor households gathered, but the experience turned out to be transformational for many of the research team."

One year later (2004)

Some of the researchers were asked to reflect on how their participation in the 'Views of the Poor' study had affected them personally and in their work one year after the experience.

...I always think of the faces and environment of those people I talked to during the study... Sincerely speaking, this picture was not in my mind before the study... I understand that I am also coming from rural areas but I didn't expect them to express the way they did... This poses challenges to both development actors and local institutions, i.e. how to respond to the wealth of this knowledge.

I would not like to meet the people I interviewed during the VOP because I feel I am part of those who ask touching and pricking questions about poverty, produce a good report and count the work is done. I do not think I can convince my interviewees of how the study will be useful to them, as I know their priority is where to eat the next meal rather than strategic long-term thinking.

Finally, we often forget that some of our staff have been brought up in poverty. It can be awkward for them to use their own experience in professional circles. This exercise enables others from more privileged backgrounds to appreciate for themselves what these staff already know. They have a joint point of reference thereafter.

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NOTE

This article is an extract from the methodological notes written by the lead trainer/facilitator, Dee Jupp (Jupp, 2004). Box 1 contains extracts from the main study report (Jupp, 2003). Both reports, and further information about the study, can be obtained from Dee Jupp, email dee.jupp@btinternet.com or Gerhard Siegfried, Head of the Evaluation and Controlling Unit in SDC, email: gerhard.siegfried@deza.admin.ch

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Immersion: the soul of development

by QAZI AZMAT ISA

The author, Qazi Azmat Isa, is the World Bank's Senior Community Development Specialist in Pakistan. Despite institutional barriers, he has made a personal decision to continue using immersions in his work, particularly to monitor and evaluate the work of the Pakistan Poverty Alleviation Fund. The author summarises the benefits of immersions over standard monitoring and evaluation practices, but acknowledges that a more profound transformation in how the Bank conducts its business will only be achieved once a critical mass of immersion experience has been built up. Finding ways to demonstrate the impact of immersions will help make a strong case for their widespread use.

Background

The Village Immersion Programme (VIP) was a programme of experiential learning. It put World Bank staff in South Asia in the shoes of their clients by spending time with the poor of the region in their villages. Initiated in Pakistan in 1996, the programme spread to other South Asian countries, initially Bangladesh and Sri Lanka, then India and Nepal.

The VIP continued until 1999, when it was affected by

Bank-wide budget cuts. Staff retrenchment increased workloads and left little time for the VIP. It was revived in August 2001, but unfortunately, due once again to Bank reorganisation, workload, and financial pressures, the official VIP programme has become dormant.

However, I have continued to use immersions in all my work, be it project supervision, sector work, or advocacy. I am a Community Development Specialist in the World Bank, and the Task Team Leader (TTL) for the Pakistan Poverty Alleviation Fund (PPAF). A TTL leads the team that is responsible for preparing, appraising, and supervising a World Bank-funded project. Primarily, I use immersions as a supervision tool for the PPAF, and it is this I describe in this paper.

Why do it?

A mystical strain lies at the heart of all the world's great religions. Sufism is the name given to its Islamic manifestation. Sufis believe that the perennial quest for knowledge and insight leads to the Beloved (i.e. that which is being sought, or enlightenment). In our quest for insight into how to improve the lives of those we serve, there is no better way than following the immersion path. Immersion allows profound learning, for along the way one discovers the true meaning of what the Prophet (Peace Be Upon Him) said: 'I

Zulfikar Ali and his son Arif at their new house.



Zulfikar Ali, a primary school teacher from Mankera district in Punjab.



Photos: Qazi Azmat Isa

The sorry state of village education.



am contained in the true believer's heart. If you seek me search in these hearts. Enter among my servants and thou will meet with Paradise.'

On a more mundane note, there is no better way to get first-hand knowledge about how development programmes affect people's lives than by spending time with them in the village, sharing meals, and talking into the night about their issues and priorities. The foundation of every successful business rests on knowing its clients. However, increasingly, World Bank staff are confined to government departments in capital and provincial cities, removed from the reality of poverty and from our ultimate clients – the poor of the country. Going on an immersion bridges this gap by exposing us to the reality of rural poverty.

I use immersions to supervise the Pakistan Poverty Alleviation Fund (PPAF). This project is funded by the World Bank and task managed by me. The World Bank team relies on several methods of supervision and review to monitor the project's objectives. The work of each PPAF unit is reviewed in detail by a sector specialist, and a 360-degree feedback is solicited from PPAF's partner organisations in formal roundtables. However, immersions have become the preferred mechanism for tracking its impact.

The supervision of community-based activities by World Bank missions has in the past typically focused, among other things, on rapid tours of client activities in selected places in order to obtain an overview of progress. The assumption is that visits to project sites will either confirm or deny the claims made by the statistics contained in written progress reports. Such visits are, however, usually 'stage-managed' in one form or another. Community meetings under these circumstances are, quite naturally, pre-arranged. They usually involve stylised, formal presentations in public gatherings and focus on physical achievements and project accomplishments. Supervision missions perform the role of 'policemen' or external evaluators, passing judgment on performance in a one-way flow of information. There is little

time to get beyond the particular views of informed and influential interpreters and come to terms with the particular circumstances and views of beneficiaries. There is little time to contextualise the interventions or really examine the relationships between providers and receivers. Little attention is given to the client's assessment of the performance of the implementing agency or of the Bank.

Monitoring through immersions breaks away – at least in part – from this 'traditional' relationship and from the implicit assumptions that underpin it. It provides an opportunity for mission members to get closer to their clients – the urban and rural poor.

How it's done

Mission members divide into groups and spend, on average, 2 days and nights in the homes of PPAF beneficiaries. The informal setting allows the hosts to open up and talk about issues close to their heart – how they spend their day, what challenges they face, what they hope and fear, how their life has changed after joining the programme.

Box 1: Dos and don'ts

Do

- Stay with your host for at least 24 hours, including a night stay.
- Adopt the lifestyle of the community as far as possible.
- Take pictures of the family and their home with your host's permission.
- Move around the community with your host (visit different homes, areas for recreation, prayer, education and health facilities, productive processes, etc.).
- Triangulate the information you have before you write your case study. PRA tools may be used to supplement the case studies. However, one should use a minimum number of tools and not convert the immersion into a PRA exercise.

Don't

- Display culturally inappropriate behaviour.
- Put unnecessary demands on the time of community members. Try to adapt to their timings rather than requesting them to adapt to yours.
- Make promises in response to community demands.

Table 1: Zulfikar Ali – a snapshot

	Earlier (June 2000)	Now (September 2005)
Wealth	<ul style="list-style-type: none"> • 4.5 acres of rain-fed land • <i>Kaccha</i> (mud) home • Bicycle 	<ul style="list-style-type: none"> • 12.5 acres of irrigated land • <i>Pucca</i> (brick) home • Motorcycle • Mobile phone
Education	None of his six children went to school	Barring the youngest, all go to school
Perception of causes of poverty	Landlessness	Lack of skills and facilities
Classification of households	By material possessions	By those who help others
Place of significance	Mosque	The road
Outlook	On personal well-being	On community well-being

Some guidelines and a brief questionnaire are given to all team members to help start the discussion and provide some consistency for documentation. No special privileges are afforded to the teams. They share the resources and company of their hosts for the duration of their stay. Bottled water is the only luxury they are provided with. Adequate compensation is given to host families and the facilitating partner to ensure that the immersion is not a financial constraint on them.

Before going into the field, each team is given a briefing about the village and the programme by the partner organisation. Each team writes case studies on their host. These have been instrumental in highlighting changes in the lives of the poor that are usually obscured by quantitative indicators of progress. Zulfikar Ali, a primary school teacher from Mankera district in Punjab, is a good example. A beneficiary of six loans and three veterinary trainings, Zulfikar was able to realise most of his dreams within the short span of 5 years. He now owns irrigated land, sends his children to school, and works as a vet after school hours to use his spare time productively. Yet the most significant change in his life is not the increase in his material possessions, but a higher social consciousness. Zulfikar now wants to work towards establishing a quality school as well as a vocational training centre for girls in his village (Table 1).

During the first phase of the project, supervision team members went on three immersions and documented the lives and experiences of 23 PPAF beneficiaries. Four of the hosts were revisited, three after 2 years and one after 4 years. In all follow-up visits there was visible improvement in their living conditions. A few even felt that they were 'no longer poor'! We plan to track the evolving circumstances

of a small number of families over the lifetime of the project through subsequent missions.

Challenges

The challenges that we face in using immersions include:

- The difficulty of freeing up more team time for direct interaction with clients.
- The time and effort involved in organising these visits.
- The tensions that can be created within a team if someone is not committed to the immersion.
- The need for team members returning from an immersion to incorporate what they have learned into programme policy, design, and implementation. But for this to happen, there needs to be more support for immersions, and a critical mass of experience to influence institutional processes and bring about a more profound transformation in how the Bank conducts its business.

Benefits

Immersion offers much more than just a reality check. Their benefits have included:

- **Rekindling the passion.** Almost everyone who has taken part has claimed that it has rekindled their passion and commitment to the Bank's mission, and has helped them see clearly the relevance of our principles and values. Living with the poor and getting to know first-hand their courage in the face of insecurity and vulnerability has been a source of inspiration to many team members.
- **Transcending scientific methods.** Immersion allows interactions with villagers that break down barriers. They promote exchanges that are not seen as extractive and domineering. This is especially the case at night, when

true sharing takes place, when much is revealed after a meal, sitting around a fire when the kids have been put to sleep and the animals tied. The knowledge and insight gained then is often missed by scientific methods.

- **Building partnerships.** Immersions have really helped in team building, with staff taking part from different sectors and backgrounds. Partnerships are also built between the Bank and NGOs. With increasing participation from government counterparts and other donors, these relationships could also be significantly enhanced. Immersions provide 'quality time' for the project's various stakeholders (the Bank, the government, PPAF, and partners). They can explore the problems and prospects associated with their partnership and the complex nature of the fight against poverty. They build trust by combining the personal with the professional in extended face-to-face contact.
- **Viewing the entire process.** Immersions offer an opportunity to see the impact of policies at village-level: how inclusive or exclusive they are; the political and socio-cultural barriers to inclusion; gaps and overlaps in services; and the need for partnerships and integration between sectors. Immersions break down sectoral chimneys and help staff identify holistic solutions for poverty alleviation.
- **Challenging dependent mentalities.** The dependency that characterises development assistance will be difficult to overcome. But an immersion is an opportunity to engage with clients in an analysis of the processes of impoverishment and in strategies for building more sustainable, independent, and enriched livelihoods. It also provides opportunities to explore ways in which different partners can develop their comparative advantages and mutually reinforce their separate activities.
- **Changing policy priorities.** Immersions have been instrumental in convincing senior officials, both in government and in the World Bank, of the importance and value of social mobilisation. This now forms part of Pakistan's official poverty reduction strategy. Even more importantly, the government has recently requested the Bank to fund social mobilisation and the Bank is supportive of this request – both unthinkable in the past!

Future plans

Immersion quality will be maintained and refined through regular feedback from team members, partners, and villagers. There are inherent difficulties in measuring the impact of immersions, because there is no tool to measure its value that would satisfy an economist's rigour (i.e. of attribution and causality). However, this must be attempted in order to build a case for the importance of immersions and identify changes that have taken place as a result. An element of self-evaluation will be included in future, and simple tools to capture impact will also be developed. In light of the strong interest in the immersion process shown by the Institute of Development Studies (IDS) and Professor Robert Chambers, we aim to collaborate with them to explore this partnership further and to develop jointly the intellectual underpinning for immersion.

Keep doing it!

I made a commitment to myself when I joined the Bank that I would always keep close to the reality of those I serve, choosing the path of immersion. This path, I believe, is the path of *ishq*, of profound love and negation: negation of the self, the ego, of colour, caste, creed, and religion. It is through negation that one can achieve union with the greater Reality, and reconnect the individual soul to its original abode. The great Sufi poet, Baba Bulleh Shah, explains this negation most beautifully in his poem titled 'O Bulleh, I wonder who I am', and yearns to 'travel to a place where all are blind so that no one knows him by his caste or creed, only the quality of his heart'. For Sufis, diversity and distinction are only illusions; they see the tangible and intangible as one reality. To reach this stage, indefatigable efforts are required to negate and nullify the ego. This can be done through ascetic practices, but the shortest route is *ishq*. When *ishq* stings the soul, the mundane transforms into the exceptional, the transient into the everlasting, and the whole universe becomes a mere reflection of the face of the Beloved. Stung by *ishq*, development professionals can transform themselves into modern-day Sufis, staying closer to the Beloved as they regularly traverse the path of immersion.

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Reality check: accountability, learning, and practice with the people who matter

by ASHISH SHAH

This article describes how one team in ActionAid working on HIV/AIDS is using 'reality checks' as part of their participatory monitoring and evaluation process. For the author, reality checks should not be one-off emotional experiences, but should be closely related to one's work, with the aim of building a long-term relationship with the host family. Reality checks allow development workers to check the relevance of their work with the poor and marginalised citizens they work with, and to account back to these citizens on the work they do and the money they spend in eradicating poverty and injustice.

Introduction

I will give you a talisman. Whenever you are in doubt or when the self becomes too much with you, apply the following test: recall the face of the poorest and weakest person who you have seen and ask yourself if the step you contemplate is going to be of any use to them. Will they gain anything by it? Will it restore them to a control over their own life and destiny? In other words, will it lead to self-governance and emancipation for the hungry and starving millions? Then you will find your doubts and your self melting away.

MK Gandhi

There has been a lot of talk recently about immersions. The dictionary defines immersion as a 'baptism in which the whole body of the person is submerged'. It is precisely because of this that I choose to avoid the word:

- First, the notion of baptism or initiation conjures up even more horrid images of development tourism, as though one is visiting a zoo to discover an animal for the first time.
- Second, many development workers in the South associate the idea only with people in the North; it is not unusual to hear them say, 'we don't need to be immersed; we came from there'.
- Third, and more worryingly, several people working in the development aid industry argue that immersions are an indulgence – that the issues are known and people know what they are doing.
- Fourth, many immersions fail to recognise the exercise of power, when a rich international agency can tell a poor citizen to host one of their own. How many of us would welcome a stranger into our homes to live our realities?
- Finally, some think of immersions as a type of endurance test, similar to an initiation, which, once passed, can appease us for our lack of regular contact with poor citizens.

This is not just semantics. In development, the importance and meaning of language have always clouded good

**Mabel Takona, AAI
HIV/AIDS Regional
Coordinator Africa,
with her host family.**



Photo: Ashish Shah

intentions. However, I am not going to talk about definitional challenges. Instead I am going to share some thoughts about what we call 'reality checks'. Reality checks are exactly what they mean: checking your work, ideology, and practice against the realities that poor citizens face.

The trigger for these reality checks was when a member of our field team asked a senior manager if he truly understood poverty. We began doing them out of a growing concern that there were too many 'upward' pulls in the organisation – staff spending increasing amounts of time meeting the demands of fundraising and visibility. But we also realised that we were often missing things: did we really understand how citizens survive on a quarter-acre of farmland, or how children who receive free primary education do their homework in the dark? The reality checks in western Kenya described here did not draw on resources from the wider organisation, but rather evolved out of a sense of individual responsibility among members of the team.

I share these thoughts and experiences from the perspective of someone who has worked in an international non-governmental organisation. Hence with that goes the usual disclaimer that I have little moral legitimacy to comment about others. None the less I hope that some of the thoughts here are useful.

Why check your relevance with poor and excluded citizens?

I have wonderful friends in different parts of the development aid industry – in donor agencies, governments, community groups, philanthropic foundations, civil society organisations, and so on. Despite the differences between us, we have one thing in common – a desire to eradicate poverty and injustice. Therefore, at the centre of our existence are poor and excluded citizens. This is the first logic of the reality check. No matter who we are, or where we are located, there must be a constituency of citizens (either one or many) with whom our relevance must constantly be checked.

The second logic concerns citizen's rights. If a constituency of citizens exists, then they have a right to influence, question, and hold us to account. This implies that the purpose of an immersion is not to extract from or be baptised by the lived realities of citizens, but rather to justify and account for our beliefs, assumptions, and actions to those on whose behalf we claim to exist.

The third is a moral logic. Gandhi famously said 'Be the change that you want to see in the world'. We cannot expect governments to understand the daily toil of their citizens, to connect with them, plan with them, and account

**Jemal Ahmed,
STAR Project,
Manager, fishing
with his host for
6 hours.**



Photo: Ashish Shah

to them if we do not do the same. We cannot expect policy makers truly to engage with citizens' voices if they connect with them only through reports and lunches in hotels. Each change starts with us as individuals. In my experience, those who have had the greatest impact in contributing to change have been those who have sought to minimise the contradictions we all face in our lives. If we don't genuinely aspire to be that change, then let's end the rhetoric now.

The fourth logic is about human relations. In a world where teleconferences, workshops, reports, and emails have become the norm of organisational interaction we can easily forget the value of deep, face-to-face, human contact. It is actually technically possible these days to make a career in the development sector without ever having critically interacted with poor citizens. How do we build strong, solid relations with poor and excluded citizens, and what does this mean? A one-off emotional experience after which you never see your host again – or a lasting, personal relationship of mutual learning, struggle, and change?

A reality check therefore has as its base these four logics:

- the existence of poor and excluded citizens;
- their right to hold us to account;
- the moral imperative to practise what we preach; and
- the importance of meaningful human contact.

Reality checks in practice

What does all this look like in practice? I will illustrate it by referring to our most recent reality check, and the seven steps involved.

In February 2007, a mixed group of ActionAid International staff working on HIV/AIDS spent a week with people living with or affected by HIV/AIDS in a village in western Kenya. Our group was made up of local and international staff from a range of disciplines, including the most senior staff in the HIV/AIDS unit. It makes a difference for field teams to see senior staff putting into practice a process of long-term connection with, and accountability to, citizens. Most of the men in the team chose to experience the realities faced by women, a request thankfully accepted by our hosts.

Leonard Okello, HIV/AIDS Theme Head, overwhelmed by the wall of death – a whole family wiped out within a span of 5 years, leaving behind a widow.



Photo: Ashish Shah

Be clear about constituency

First let us identify a relevant citizen. Let us explain to them our work and purpose, and ask them if we can build a long-lasting relationship. If we work on education, let us spend quality time understanding what education really means for a child who lives near a primary school from which no student has ever passed into secondary school. If we work on agriculture, let us spend time with a farmer who is struggling to survive on one acre of land. If we are working on HIV/AIDS, let us spend quality time with a person living with HIV/AIDS in order to understand the complexity and challenges of their lives. In other words, build a relationship with people with whom you have something in common in terms of the focus and energy of your work. Don't do a general visit.

Live and experience reality with an attitude of openness, reflection, and questioning. Make new friends!

Spend your time learning about and appreciating the truths of your host's life, while also questioning and testing the relevance of your work and practice against the realities you experience. Try and explain your work – what you do, why you do it, and the resources you use – to this one person. Listen, learn, and question your assumptions. Look for what is working and what is not. Keep your eyes open for what you might miss. Sleep every night asking what the day you have experienced means for the work you do.

In western Kenya we felt many things:

- anger about things we could have done differently;
- hope that there are some things to which we are adding value;

The team listens to advice during a visit to the village to account back.



Photo: Ashish Shah

- inspiring moments that reconfirmed for us the power of local citizenry;
- challenging moments that provoked us to question our own assumptions, beliefs, and attitudes;
- physically painful moments that showed us just how difficult it is to earn a livelihood;
- learning moments that opened our eyes to a whole new way of looking at things; and
- embarrassing moments that put us on the spot about how we use our resources.

Here are some of our thoughts:

I've learnt more about HIV/AIDS and its impact in the last 24 hours than I have in the last 6 years that AIDS affected my family.

I've learnt more about women's rights and the struggle that

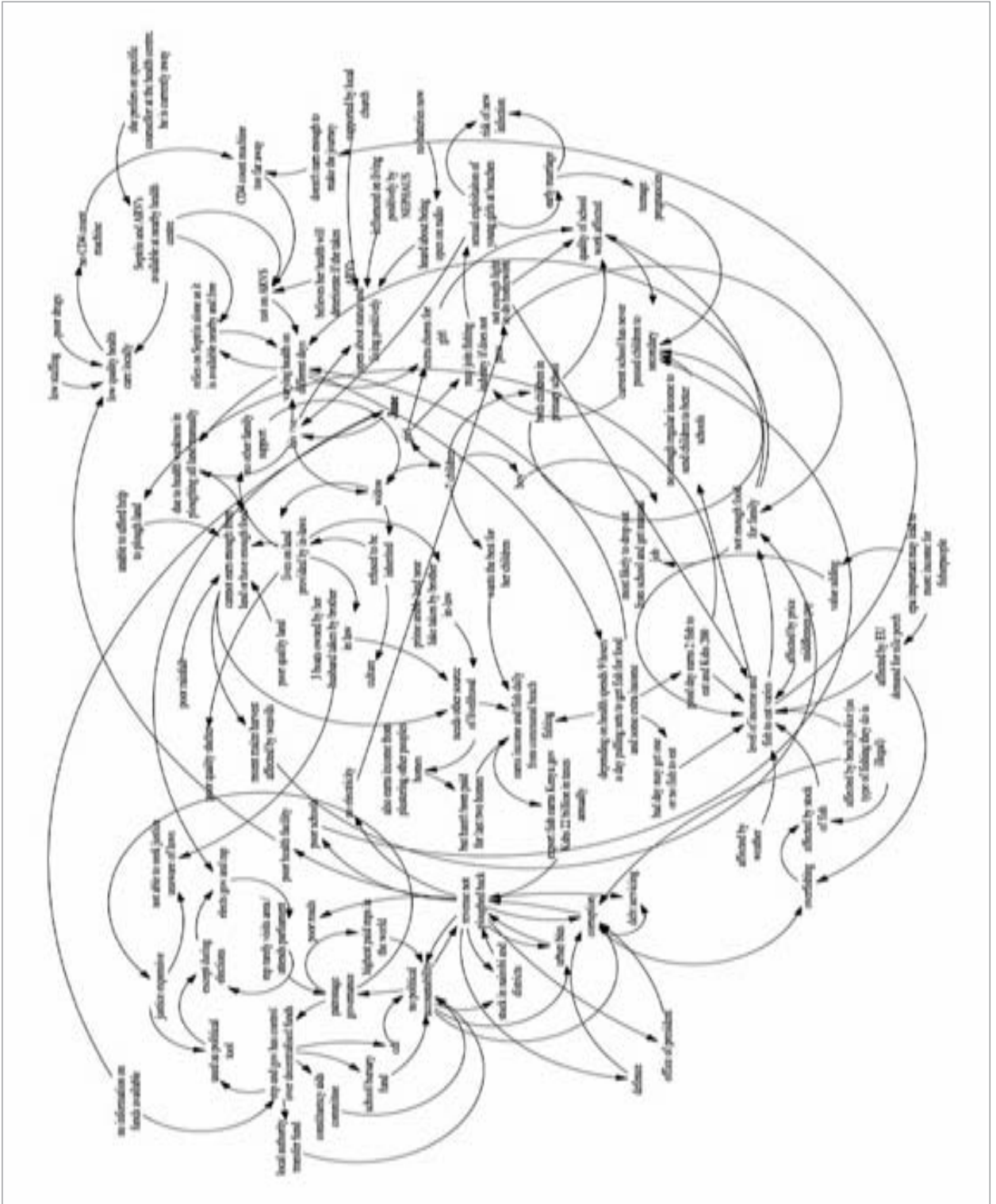
women go through by this experience than I have ever learnt through any gender training or workshop.

This is the start of a long-term relationship for me. We must see change in at least one person's life, otherwise all that we do means nothing.

I never realised that it is so hard to explain what I do to the people who I claim to work on behalf of. It's easier to write reports.

If one person's life is so complex – with so many factors causing poverty and injustice – aren't we doing more damage by reducing things into pieces we can manage in our offices? How do you put all this complexity into a logframe – and this is just the complexity of one person's life as understood in three days? (See Figure 1)

Figure 1: One person's complexity



**The team
accounts back
to the villagers.**



Photo: Ashish Shah

Make sense of what you have experienced. Plan how you will account back to a wider group of relevant citizens and the village at large

After 3 days, come back together in the village with your team and reflect. Everyone will have a story to tell. Prepare together how you will account back to a wider citizenry in the village for the work you have been doing at all levels. Draw on your experience with your host to help you limit the usual jargon we use in development, and so that the facts and figures you share can resonate more easily with your audience.

In our case it was fantastic sitting with a mix of staff from all levels of the organisation, making sense of our experience and working together to account back. Just the process of doing so highlighted many of the disconnects that exist within our own organisation, with each level trying to do things separately rather than building on each others' work. Could this be a microcosm of the wider development sector? We twitched and itched as we wrote down our salaries, and the money spent on workshops, flights, and conferences. But we had to do it. After all, we had promised citizens we would account back to them for the resources we have spent.

Some of our feelings were:

This means a lot to me. This is one of the very few times that somebody from the head office has actually tried to understand the context we work in, and is keen on working with these realities as the starting point.

Field staff member

I feel morally powerful, you know. I mean, of course it is scary trying to put all our finances and figures in the open, including our salaries. I don't know how the citizens will react. But behind that fear is my own strength and belief that this is the right thing to do... after all, this is exactly what I want my government to do – account back to me. So now I have some moral legitimacy to ask my government to do this.

International staff member

Account back to citizens for the work you have done in the name of eradicating poverty and injustice

A long-term relationship is built on openness, honesty, and trust. They say that, in the development sector, if you can talk about money openly, then you can talk about almost anything else. The more open we are, the more trust we

“The more we create circumstances in which citizens have power over us and force us to account, the more these experiences will translate into increased citizen confidence to hold others to account.”

build, the more real our work becomes, and the stronger our relationships become. Our moral legitimacy to question others and hold them to account increases or diminishes depending on our own transparency and accountability to citizens. And the more we create circumstances in which citizens have power over us and force us to account, the more these experiences will translate into increased citizen confidence to hold others to account.

In western Kenya we spent a day accounting back to over 100 citizens in the village. We did this from local, to national, to international. We engaged in dialogue, conversation, and questioning. We were given advice, challenged, and shouted at. At the end of it all, we gained more trust and mutual respect, and we made promises to improve our own work and practice at all levels. Citizens told us and asked us many things:

Why are there less resources for local-level work? Why do you spend so much on conferences and workshops and flights?

You claim to have trained many women. Who decides who should be trained?

You noted that you successfully passed the HIV/AIDS Act nationally. How come no effort has been made to inform us of what this Act says? How come we don't know about this Act?

Every year we get so many different people here – NGOs, governments, etc. – you are all claiming to do one and the same thing. Why don't you all work together? There is too much duplication.

We really do find the work of the PLHA network to be useful. It's really supported us a lot.¹

How do you make sure your international and national work is founded on facts and truths from what you have seen and experienced?

We don't mind you employing many staff... but pay them less.

Many of us had often used the excuse that work at international and national levels is too complicated for citizens to understand or engage with. Our experience in western Kenya taught us the contrary. Villagers found it helpful when some of our international staff explained how the universal access agenda has been hampered due to the dilly-dallying of our health ministers. But they also questioned why we only wait for one-off events to apply pressure on them, and why we do not do this more consistently throughout the year.

Today we will be asked 1000 extremely tough questions. Tomorrow 999 questions, the next day 997... When we reach zero, we know we will have passed the relevance test.

Staff member

Come back together in your team to reflect on what the process has taught you and plan for the future. Improve your practice

The whole experience of living with citizens, experiencing their realities, accounting back to them, and learning from them is useless if it doesn't inform your future work. Sit together to re-plan. Commit yourself to tangibles that you can work with throughout the year, and then account back for these to the same group of citizens and to your host 1 year later.

We were challenged by our own disconnection – by how much more we need to be doing locally, and how we need to ground our national and international work in those local realities. We started to rethink what our experience means for our HIV/AIDS work. We found ourselves coming up with new ideas, advice, and practical things we could do. This process is still continuing as I write. We hope that our practice will improve and become more relevant.

Make a commitment that this is not a hit-and-run process. This is the start of a long-term relationship. It doesn't end here... this is where it begins

If your work is about direct poverty eradication, do not take part in a reality check if you are not willing to commit to a long-term relationship with your host. This should be based

¹ PLHA: People living with HIV/AIDS

Box 1: Extract from 'Stop and Pause: internal AAI reflection guide for HIV/AIDS staff' by Leonard Okello and Ashish Shah, September 2006

- When are we going to stop and account back for all that we have been doing to the people that matter?
- When are we going to provoke ourselves and put ourselves in the uncomfortable position of justifying our existence to poor and excluded people?
- When do we listen and have our strategies challenged or approved by PLHAs
- How do we judge and learn if what we are trying to do is actually relevant and necessary for PLHAs?
- When do we question what we could be doing differently?
- How do we share what we are proud of and the lessons and successes we have had?

With all our work, action, talk, it is possible for us to forget that it is very easy....

It is easy:

- **It is easy** for those of us within the organisation to be consumed by our own rhetoric and jargon.
- **It is easy** for us to get overwhelmed in a cycle of meetings, talking, travel, and top-level advocacy, all whilst we preside over increasing poverty and injustice facing people's everyday lives.
- **It is easy** for us to spend money, time, and resources on matters that, if poor and excluded people had the choice, would not be a priority nor would resources have been used on.
- **It is easy** for us to stop listening – particularly to PLHA's and their realities, to our own local staff and their daily challenges.
- **It is easy** for us to get stuck in a routine of processes – where planning, reflecting, reviewing are all mundane and lack rigour and depth, blocking us from really improving our practice and where processes stop being processes and become events.
- **It is easy** for us to get consumed in the trap of reporting to please hierarchy (whether these are manager, donors, or supporters) at the expense of learning and redefining our practice.
- **It is easy** for us to get overwhelmed and busy, yet in that busyness achieve little or miss out the smaller things that would make a bigger difference.
- **It is easy** to fly to conferences and meetings pontificating about HIV/AIDS whilst 8000 plus people die daily of AIDS and others live in harsh realities we often tend to forget.

on who you are as a human being, driven by your personal convictions and beliefs, not who you work for. Otherwise, reality checks risk becoming a one-off form of development tourism. Promise your host that you will come back next year (and if possible work with them throughout the year), and account back for what you have done to help improve their lives.

Since our experience we have all found ourselves in a continuing relationship with our hosts. This is not a monetary relationship: it is a relationship of friends, peers, and

comrades in the same struggle. We find ourselves asking 'What would our host advise?' before doing something. We know that next year we will have to explain ourselves to our hosts and citizens yet again.

Share your emotions and experience with others, in the hope that the practice of accounting back to citizens begins to spread

The biggest learning that takes place in a reality check is a learning of the heart. This is a personal learning, which is difficult for any one of us to share sufficiently with others. None the less, make an attempt to provoke and encourage others to take up a similar practice. Help them, guide them, and show them that it is possible, no matter where you are located.

Our group shared their experiences in western Kenya with the wider HIV/AIDS community in ActionAid. The reactions were mixed: some questioning why we should go through such a process and others embracing the idea. Work with those that embrace it. Increase the constituency of practitioners who believe in accounting back to citizens. Their experiences will encourage others, small steps at a time.

Final thoughts

So this, then, is our experience of reality checks. We learnt that it cost us less to account back to citizens and be evaluated, challenged, and provoked by them than it would have done to have hired an external evaluator. After all, the best monitoring and evaluation is done by those from whom we claim our existence. If we can improve our transparency and accountability to citizens, then our transparency and accountability to other stakeholders, be they donors, supporters, or our own colleagues, will also improve. But this kind of accountability should not be attempted unless a culture of mutual trust, power sharing, and questioning has been put in place. In western Kenya we have worked for the past 5 years to make financial information public and to give citizens the right to view and question budgets. This HIV/AIDS reality check was the first time that they had the opportunity to question national and international staff, but that was only possible because it had already been happening at a local level.

Almost all the reality checks in western Kenya have been with highly marginalised people, who have no beds, no latrines, and sometimes no roofs. In our case we decided as a team that this was something we could handle, although we recognise that when arranging reality checks for donors, more support may be required.

**Team reflections
post accounting
back.**



Photo: Ashish Shah

However, reality checks are not just about reaching the poorest (even if the definition of 'poorest' were clear). They may also be about understanding the range of views and experiences within a community – for example, the reality faced by a rural government officer who has no resources to work with, or how the better-off members of a community support those worse off. The starting point should be to clarify the purpose of the reality check, and only then to decide with whom you engage.

If we are all truly fighting for one common goal of eradicating poverty and injustice, then it may be useful for different actors to do reality checks together, so that we stop duplicating and competing with each other, as one citizen pointed out. Next year we hope to spend time encouraging others to be involved in a similar process.

It also seems that the mutual understanding needed for harmonious and focused working relationships between local, national, and international staff can be strengthened in large organisations through this kind of process. This is made most effective when the organisation's leaders make it their personal responsibility to send an important signal: that our most important accountability is to the citizens we strive to achieve change with.

Call them what you like – immersions, reality checks. The point is: only spend time with poor and excluded citizens if you are willing to account back for what you have done (or not done). Otherwise, immersions run the risk of becoming appeasing substitutes for good, solid fieldwork, and masking many of the decisions we make in the name of eradicating poverty and injustice.

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NOTES

These views do not necessarily represent those of ActionAid International. The author accepts full responsibility for this text. ActionAid is not liable for any comments in this text. When writing this article, Ashish was working with ActionAid International. The Principlelink team has recently been working with Members of Parliament in Kenya to help them engage in reality checks and account back to their constituents.

Section 4: Part III Influencing policy and institutional direction

This third and final section looks at some of the ways in which immersions are starting to influence policy and institutional direction. The most significant example is from Sida. In the first article **ESSE NILSSON, OLOF SANDKULL, MOLLY SUNDBERG**, and colleagues give a factual overview of Sida's experience. Sida has drawn up a two-page statement on immersions. Its Asia, Middle East, and North Africa Department has made them a part of its 2007 and 2008 annual plans, and the Sida team in Bangladesh is carrying out a five-year process of structured dialogue with poor people to help inform and subsequently monitor its country strategy. The second article by **DEE JUPP** describes the last of these in greater depth.

All these examples show how Sida is trying to keep a balance between high-level dialogue with its development partners (Southern governments) and perspectives gathered 'from below'. The challenge for Sida is now less about helping colleagues appreciate their importance and more about supporting their implementation.

The next article describes the impact of Exposure and Dialogue Programmes (EDPs) on the work of the German parliament over the last 20 years. **RUTH MÖLLER** describes how she and her colleagues have more recently been lobbying to institutionalise this practice within the parliamentary system and discusses the essential infrastructure needed to realise its benefits.

Finally, emphasising Möller's testimonial, **KARL OSNER** – who pioneered Exposure and Dialogue Programmes (EDPs) in the early 1980s – provides a meaningful insight on the role that immersions have played in the pro-poor reform of the German Aid system. Osner explores whether immersions can contribute to the practical shaping of a New Aid Agenda in a meaningful way, one which is based on a culture of dialogue between decision makers and the poor, between state and society, and between recipient countries and donors.

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Taking onboard immersions within Sida

by ESSE NILSSON, OLOF SANDKULL, and MOLLY SUNDBERG

This article describes how the Swedish International Development Agency (Sida) understand immersions, and the progress of adoption of immersions in the organisation. Some staff members remain sceptical about the purpose of immersions and whether they can add any value to work within a funding agency such as Sida. However, general scepticism is progressively turning into cautious interest, as more staff members undertake immersions, and senior management encourage them to do so.

Sida's understanding of immersions

An organisational statement entitled 'Sida's View on Immersions' defines an immersion as follows:

The philosophy behind immersion is about gaining insights into people's lives through participation and observation; in other words, to take an active role in the lives of the people one aims to assist and to do this on their terms. In practice, this means visiting a local community in a partner country while participating in their daily routines. The underlying idea is that a thorough and holistic understanding of another

person's life situation and perspectives requires oneself to practically engage in that person's daily life. An immersion thus entails a structured exercise in experiential learning as a means to better relate to people both emotionally and intellectually...

... In sum, conducting an immersion is one way to obtain a reality check thereby assisting us in our day-to-day work, and to establish contacts with the micro level to supplement and strengthen the work carried out at the macro level. It is a way to better understand and reflect on the real life impact that policies are intended to have.

The kind of reflection that an immersion evokes serves to also equip the Sida colleague with the means to use their own insights and experiences in contribution management and dialogue with partners (donor group and national actors). Own witness statements can often work to build up credibility and convincing ideas, communication and arguments. This kind of first-hand experience can also enable staff to see how multi-dimensional poverty really is, how all 'mainstreaming issues' fit together (or not), and thus ultimately lead to a sharpened and more coherent poverty focus.

Conducting immersions is consistent with the main policy documents guiding Swedish development co-operation. Since 2003, all work is directed by the Policy for Global Development (PGD). One key component of the PGD is that co-operation should take its point of departure from poor people's rights and their perspectives on development. Sida's former Director General argues that undertaking immersions is one way in which Sida staff can pursue this task: taking the opportunity to leave their office routines and instead share the everyday experiences of people living in poverty.

Progress on adopting immersions in Sida

Several staff members at Sida have undertaken immersions.

Göran Holmqvist, former Head of the Africa Regional Department and now acting Director General, has done two immersions. In February 2006 he went to Nicaragua and stayed in a remote village for 6 days. Three months later, he spent 3 days in a local farmer's house in Niassa province in Mozambique as part of his induction as the new head of the department. Holmqvist concluded that his experience had offered what he had hoped for most – an alternative way of learning, through emotional exposure rather than conventional intellect. As he himself put it, the immersion gave him that 'gut feeling' of the life and perspectives of the people he lived with.

In October 2006, the Head of the Policy and Methodology Department, **Staffan Herrström**, visited a family in rural Moldova for 4 days. Struck by the poor and harsh conditions his host family lived in, he was overwhelmed by the great generosity and hospitality they nevertheless showed him and the interesting conversations they had together. Herrström emphasised that the most valuable thing for him was having the time to sit down and discuss with his host family things that mattered to them.

'Everyone at Sida should do an immersion!' These are the words of **Göran Schill**, a Sida staff member at the Embassy of Sweden in Colombo, Sri Lanka, who together with **Olof Sandkull** from the Asia Department spent 3 nights in March 2007 in a village close to Hambantota. He was initially quite sceptical about the idea of immersions, but living with a family affected by the tsunami really made him change his mind.

Shortly after, another member of the same department, **Ulrika Lång**, went on an immersion to a rural village in Indonesia. Upon her return, Lång said that she had been surprised by the vulnerability of the family members due to their poor living conditions, and by the importance of

complex social networks to the survival of all community members. She also realised the important role that local traditional religion plays in the everyday lives of the village members, compared with the influence of Islam.

'Mini-immersions' were organised in April 2006 as part of the preparations for the new 5-year country strategy for Bangladesh. These were shorter and lighter than immersions usually are: the group spent 1 night in a village, but stayed in an NGO guest house rather than with families. Nevertheless, this still provided insights which were deeper than those gained during standard field visits. It gave the senior managers from Stockholm who took part the chance to talk with ordinary people in small groups, to get a better understanding of their realities, and to triangulate the information they were receiving from official sources such as clinics and schools.

These mini-immersions were an eye-opener for the participants and were very much appreciated by Sida staff. They triggered discussions about the reasons behind the failure of development programmes to reach the poor. The experiences gained from the immersions made a crucial impact on the direction of the forthcoming country strategy, steering it towards a sharpened poverty focus and a commitment to participatory research (Reality Checks) as a means of gaining insights into the perspectives of people living in poverty.

Sida in Bangladesh has now built on the above by starting a programme of Reality Checks to ensure that dialogue from below informs the country strategy on a long-term basis. Reality Checks combine immersions with more conventional participatory approaches (see Jupp *et al.*, this section).

In recent months there have been three more immersions. **Anna Springfors** spent 4 nights in a slum in Estelí, Nicaragua. **Helena Thorfinn** visited a village in Bangladesh for 1 week close to Barisal (within the same village as the Reality Check, although carried out independently of that). **Britta Nordström** also visited a village in Bangladesh for 1 week, not far from Satura. The positive impact of immersions is illustrated by a report written by Britta, who wrote that:

Having done this I can now sit at the same table as high-level officials from the World Bank and look them in the eye and convincingly argue for our point of view.

Taking forward immersions in Stockholm

At Sida's headquarters in Stockholm, other staff members have been introduced to the topic of immersions and encouraged to try them out.

In January 2007 a workshop on immersions was organised by the Social Development Adviser **Esse Nilsson** from Sida's Policy and Methodology Department. The special guest was Robert Chambers. He talked about his many years of experience of participatory learning within development work. During the workshop, immersion experiences were shared and issues raised relating to practicalities, ethics, added value, and how to internalise one's experiences from the field.

Another workshop on immersions took place in May 2005 with representatives from ActionAid International (Sweden, the UK, and Ghana). The workshop particularly targeted members of the Asia-MENA Department at Sida. Their annual plan for 2007 stipulated that all Country Programme Coordinators should do an immersion. The same commitment will be extended into 2008. Anthropologists from Gothenburg University were invited to share their experiences of field work. They gave practical advice and made connections for future co-operation in the field with Sida staff members interested in or planning immersions. Meanwhile, the Department for Infrastructure and Economic Cooperation has also expressed an interest in knowing more about immersions and how to conduct them.

An information pack on practical issues concerning immersions has been put together and distributed to Sida departments and embassies in partner countries. The pack contains the Sida statement 'Sida's View on Immersions' (2007), as well as a statement by the former Director General at Sida, **Maria Norrfalk**. She expressed her support for staff members undertaking immersions, saying:

We would like to encourage this. We believe that this can enhance our understanding of the social realities where aid work is carried out and further contribute to our understanding of poor people's perspectives on development.

So far, seven articles have been published on Sida's intranet about different staff members' experiences of immersions. One discusses the meaning of immersions

"Slowly, people are becoming more convinced: initial scepticism is declining, and interest in conducting immersions is on the increase both at Sida headquarters and at the embassies."

and makes the case for their use. The other six were written by staff taking part in immersions in Bangladesh, Sri Lanka, and Moldova.

All these articles and workshops and the staff members participating in planning and carrying out immersions have helped to trigger debate and raise staff awareness of the added value of immersions. We know that some colleagues have questions – often unspoken – about immersions: about their relevance, the time required, the risks of 'development tourism', and the possible threats to their personal safety and comfort. We also know that until they can really see their potential benefits, it will be hard to overcome these barriers. Our approach is therefore to inspire by example: to encourage more people to do them and to publish their experiences on the intranet, and in so doing motivate others to try.

Slowly, people are becoming more convinced: initial scepticism is declining, and interest in conducting immersions is on the increase both at Sida headquarters and at the embassies. More recently, other countries have expressed interest in the Reality Check approach in Bangladesh. There is still a long way to go before immersions are truly institutionalised within Sida as common practice, but we have made progress – we have helped colleagues appreciate why immersions are important. Now we need to help them understand how to put them into practice. As Maria Norrfalk, former Director General, said,

There are no right or wrong ways. Instead an immersion is a method which demands your own creativity.

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Reality Checks: first reflections

by DEE JUPP with MALIN ARVIDSON, ENAMUL HUDA, SYED RUKONUDDIN, NASRIN JAHAN, MD AMIR HOSSAIN, DIL AFROZE, FATIMA JAHAN SEEMA, MD MOMINUR RAHMAN, SOHEL IBN ALI, RABIUL HASAN ARIF, SOMITA, DAVID LEWIS, and HANS HEDLUND

In this article, Dee Jupp and colleagues describe how the Sida (Swedish International Development Cooperation Agency) team in Bangladesh is carrying out a 5-year study to track the progress of two Sida-supported programmes in primary healthcare and primary education. Their 'Reality Checks' combine immersions and conventional participatory approaches, and involve visiting the same host families and communities each year, at the same time of year, to see first hand how policies are playing out at local level. Although in its early stages, the approach is already providing many new insights with important policy implications.

Introduction

Sweden's current Policy for Global Development (2003) emphasises two key perspectives:

- poor people's perspectives on development; and
- the rights perspective.¹

Sida has published a Working Paper (2006) which sets

out specific measures to ensure that these perspectives, as well as its principles of participation, non-discrimination, transparency, and accountability, influence both processes and results in all its work.

The paper states that:

The approach makes people living in poverty into important and active participants in developing their society and utilises their voice, abilities, and knowledge at all levels... the dynamic direction is from the bottom up. This is also the level where we can clearly understand how poor people's living conditions are affected by participation or exclusion and the extent to which they are able to, or allowed to, benefit from the gains of processes of change (p13).

It concludes that:

Sida has a unique role to play in the international arena by showing the importance of the two perspectives in achieving our shared international commitments against poverty and for more effective development cooperation (p18).

Sida has thus been actively encouraging all its depart-

¹ 'Shared Responsibility: Sweden's Policy for Global Development', Government Bill 2002/03:122.

ments to 'clearly indicate (in their work plans) how they intend to work with a sharpened poverty focus, including the promotion of the two perspectives' (Appendix 1) and how, within the new aid architecture which emphasises more budget and sector support, it will make poor people's perspectives visible. It suggests that innovative actions are required and 'Sida must have its own expertise and capacity to perform and implement these analyses' (p14). The Swedish Embassy and Sida in Bangladesh have pioneered the Reality Check as a key element in their efforts to ensure dialogue from below in their new Country Strategy.

How do the Reality Checks work?

The Reality Check is a means of listening to the voices of people living in poverty and understanding people's perspectives on primary healthcare and primary education, both of which are supported by Sida in Bangladesh through two large sector programmes. The Reality Check combines immersions with more conventional participatory approaches to create the best possible environment for open communication. Study team members each live with different poor households for a minimum of 3 nights and interact with all the members of their household as well as neighbours, other members of the community, and service providers. As far as possible they attempt to integrate in the household and make great efforts not to be treated as guests. They accompany household members to school, health facilities, work places, and social interactions, or mimic these actions on their own to experience exactly what is meant by 'long walks', 'long waits', 'lack of facilities', 'poor roads', 'high cost' etc.

The Reality Check is a longitudinal study over 5 years, involving the same communities, living with the same households, at the same time of the year in order to track changes over time. A pilot was carried out in May 2007 to test out and refine the approach and the first of a series of annual Reality Checks was conducted in October/November 2007. Three teams worked in three distinct districts. In each district three communities were selected:

- one urban (slum);
- one peri-urban; and
- one rural.

This makes a total of nine communities covered by the entire team.

All three of these locations were selected on the basis of information from local key informants suggesting that these were poorer communities which all related to the same municipal town (e.g. for administrative issues, referral to

"The Reality Check combines immersions with more conventional participatory approaches to create the best possible environment for open communication."

municipal hospitals etc).

The published brief on the Reality Check (2007) states that the

... study will provide new information on poor people's perceptions and experiences of health and education services. In addition to shedding light on progress with formal services, information on less visible but highly important issues (particularly to the poor) such as informal services and reasons for non-use of services will be gathered. It is anticipated that information emerging from the Reality Check should be used to influence and shape both policy and programme implementation within SWAps towards better outcomes for people living in poverty.²

The team of nine comprises international and Bangladeshi experts who all have considerable experience of using participatory approaches in Bangladesh. Despite this, every member concurs that use of the immersion process has revealed new insights and created new platforms for dialogue and openness with people living in poverty, which both complement and extend more traditional forms of participatory enquiry.

Immersion observation

Immersion adds value to the study in a number of ways. The importance of this is best illustrated by a few examples.

The number of meals taken by households in a day is an accepted indicator of poverty in Bangladesh. There are many studies which document how this number has increased so that most households apparently now take three meals. However, experiencing these meals by eating with the family for 4 days provided a new insight into the reality of these statistics. One of the Reality Check team members described his experience as follows:

² The sector-wide approach (SWAp) for lending pools resources from different organisations and tackles several projects within a sector, instead of providing lending to individual projects.

“The Reality Check is a longitudinal study over five years, involving the same communities, living with the same households and at the same time of the year in order to track changes over time.”

Each meal consists of rice cooked in a full pot of water with some arum leaves. This turns into a rice soup and only this way extends to six members of the family. This is not a meal... recording the number of meals like this taken in a day does not make sense.

House construction is another traditional indicator used as a basis for determining levels of poverty by many programmes in Bangladesh. However, Reality Check team members noted:

Poor people have had access to housing loans and some have built brick houses. At first we thought they were not poor but living with them we realised that in order to pay the instalments on their loans, they have cut their consumption.

One team member recorded:

My host family's neighbour made me a meal one day. She is a trained birth attendant and lives in what appears to be a good brick house. She gave me boiled rice with leaves plucked from the roadside and flavoured with a little chilli. This was what she ate every day. This shook me. This woman was really struggling. How would I ever have understood that if I had not taken food with her?

Much has been made of the ‘total sanitation’ initiatives in Bangladesh, and our host families mostly had some form of latrine (with some exceptions among the urban hosts). However one team member noted:

I shared a bed with the grandma for 4 nights. Every night she got up twice to relieve herself. The latrine was located a long way from the house and she never took a light with her. It was clear from the short time she was away that she squatted outside the hut.

And another:

My host did not want us to accompany her to fetch firewood. This puzzled us. Later, on trying to use her latrine we realised it was for show only. It comprised the top slab and nothing else. She never used it but rather went into the nearby scrub land to defecate.

And another:

I asked to use the toilet in the market but nobody knew who had the key.

Immersion enables the sharing and building of knowledge

The fact that the immersion involves staying for a period of time helps in the process of gradually building knowledge and trust. Again, extracts from field notebooks help to illustrate this.

One team reported:

During the days spent in the community we travelled to health complexes by rickshaw, rickshaw van, boat, and by walking, in order to see what people meant by saying ‘it is too far’, or ‘the road is bad’, or ‘the hospital is crowded’ or ‘dirty’. We took the road they would take, saw what they would see in terms of facilities offered (or not offered), and came back with knowledge and experience that we could share with them. Having done this we felt our credibility (as wanting to understand their reality) was reinforced. We had a different platform, a shared experience that we could start to talk about. This made it easier to grasp what constitutes their perceptions, and differences in what people emphasise as problems: a twenty-minute journey can be far for some, but not a problem for others; a dirty ward can put some off, while having a bed all by yourself (in the very same ward) was much appreciated by others.

Another team member had visited the local school. Two temporary teachers were struggling in the absence of the head teacher (called away to a training programme) to manage three overcrowded classes. The classes included infants as young as three who were being baby-sat by their older school age siblings. A couple of days later, the team member was sitting in the local tea shop when one of the beleaguered teachers popped in. Knowing that she had witnessed the chaos at the school, he opened up about his frustrations over cups of tea. The head was called away too much for training and administrative duties; he had to travel by bicycle 25 miles to and from school; children

skipped afternoon classes after Tiffin time to watch TV programmes; school shifts should be earlier; teachers were never consulted.³ This kind of interaction rarely happens in conventional evaluations.

And another team member reported:

During our first discussion, Fahima, a mother of three, emphasised how important it is to provide your children with education. Only one of her children lives with her and has been selected as a 'sponsored child' by an international organisation. We felt sceptical about her views and thought that she was probably used to expressing this vision regarding them perhaps as something outsiders would appreciate. But over the next four days we had many conversations. It became clear that these views on education had real impact on the plans and actions of her daily life. For example, she would not touch her savings in a crisis but rather borrow from friends and neighbours. Her savings were uncompromisingly earmarked for her children's education. Another conversation about her ill-health and the cost of treatment led to her telling us that she did not touch her savings to pay for this either. Instead she and her husband decided to sell some of their rice and borrow from neighbours. From listening to Fahima and trying to understand her daily life we began to understand that the views she expressed during our initial discussion do have real implications for her life and her daily activities.

Immersion helps to 'see' the perspective of others

Although the immersion is short and it is never possible to step into others' shoes, some important reflections were nevertheless made, as these extracts from field notes illustrate.

A long-time proponent of formal maternity care, one team member found that through living in a household in a community her views have been challenged. She is now in no doubt that she would use a traditional birth attendant if she was living in that situation:

The traditional birth attendants are neighbours and family. They have brought everyone I met into the world. They are kind and gentle and would know all about me. They are 'on call' whenever I might need them. They have helped throughout the course of the pregnancy. They are not doing this for money, they are doing it out of love. So they are not going to make money from commissions for referral for un-

"...use of the immersion process has revealed new insights and created new platforms for dialogue and openness with people living in poverty, which both complement and extend more traditional forms of participatory enquiry."

necessary tests. In fact, doctors in the hospital told me that the most unhygienic and most hostile place to have a baby is the hospital. 'Why traumatise a young mother by bringing her to the hospital where she knows no one and gets little attention... better she gives birth amongst those who love her and with germs she already has an immunity to!', one doctor told me.

Without meeting the traditional birth attendants, spending time with those who had recently had babies, and seeing the preparations made for home delivery myself, without making journeys on rickshaws, buses, and boats to reach the Maternity Hospital and seeing the labour wards and interacting with the staff myself, I would have never ever believed that I would come to this conclusion.

Similarly, studies tend to denigrate traditional and alternative medicine. The language used to describe them emphasises this: they are 'quacks', 'village doctors', or 'fakirs'. A team member wrote of her experience in the slum as if she was a resident of the slum:

I visited the homeopath at the entrance to the slum to have my sore throat checked. The homeopath is situated a minute's walk away from my 'home'. He is open at times when I am not working. I lost no earning time going to see him. I walked straight into the office and sat down. The doctor is from the locality and is pleasant, calls me by my name and gave me time. He has certificates displayed in his office which gives me confidence. He examined my throat and took time to explain what was wrong and what he would prescribe. He gave me medicines immediately and would have only charged for the medicine not the consultation if I had little money. The cost was only a few taka, unlike the cost of medicines prescribed by doctors in the hospital. He was prepared to let me pay later. There were lots of tablets in the phial he gave me, which would last for

³ The term 'Tiffin' is generally used to mean a snack between meals.

many days so I feel I got good value for money. He encouraged me to come back if the problem persisted. He knows me, and I know him so I trust him – his business depends on people believing in the efficacy of his treatment.

Policy implications

The examples given above are just a very small part of the range of experiences uncovered during the first round of the Reality Check. Sida intends to bring these perspectives to policy discussions:

- in joint Ministry-donor consortium meetings on the SWApS;
- by official inclusion of the reports within the reporting framework for the SWApS;
- by presenting the Reality Check study in different forums;
- by hosting exhibitions of the photos and life stories from the Reality Check; and
- by publishing user-friendly extracts from the study reports.

Again, we present a couple of examples of how the Reality Check has provided new insights with important policy implications:

Bangladesh operates a primary school stipend programme to encourage poor children to attend primary school. While other studies have exposed some of the corruption surrounding the awarding of these stipends, some new issues have been uncovered in this Reality Check study as a result of living with or interacting with families.

- Urban children are sent to live in rural areas so that they can get the stipend, which is not available in urban areas.
- Siblings are sent to different schools so that they can get the full stipend. If two siblings go to the same school the second one only gets 25% of the stipend.
- Despite the directive that stipends should be paid out by bank officials, in many areas head teachers are administering the stipend programme.

Every year, primary schools are expected to prepare a social map indicating, among other things, 'out of school children' and 'children with disabilities'. None of the maps observed related to our experience. Numbers out of school were often zero or very few, and yet families we interacted with either had or knew of drop-outs or children who had never been to school.

In one area, school teachers confronted with this observation said: 'Ah, but we only record the households which are willing to send their children to school' – thus defeating the object of the survey. Reaching Out-of-School Children (ROSC) is a new programme for drop-out children, but if the data at school level is so poor then how will this programme plan its resources? In one area where a social map had been attempted with a little more rigour, the numbers out of school are twice those to be catered for in the proposed ROSC programme for the area.⁴ Numbers of children with disabilities recorded on the maps were in single units, yet during the course of the Reality Check many children were interacted with or observed who had disabilities which prevented them from attending school.

The report of the first round of the Reality Check will be published in early 2008. It has already attracted a lot of interest and expectation. Immersions are quite demanding of the research team (physically and emotionally). The reality hit our research teams very hard this month when the news came that one of our host households had been widowed and two of our host households had lost their houses as a result of Cyclone Simr. However, without a doubt this approach adds considerably to the understanding of how central policies play out in reality and can make an important contribution to improving and shaping future policy.

⁴ Interestingly by a NGO registered school

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The impact of Exposure and Dialogue Programmes (EDPs) on German parliamentary work and decisions

by RUTH MÖLLER

This article is based on extracts from the report of the International Workshop on the Promotion of Participatory Development Processes in the Fight Against Poverty and Exclusion.¹ The author, Ruth Möller, is Senior Development Policy Officer with the Social Democrat Group in the German Federal Parliament. She presents an account of the history of German MPs' participation in EDPs since 1985. She then discusses the impact of an EDP in which a whole parliamentary working group, the Study Commission on Globalisation of the World Economy, took part. Although both the President of Parliament and this parliamentary working group now recommend EDPs, the author acknowledges that there is still a long way to go before EDPs are fully institutionalised in the German Parliament.

During the 14th election period, the German Parliament established a Study Commission (Enquete) on 'Globalisation of the World Economy – Challenges and Answers' with 13 Members of Parliament (MPs) and 13 external experts. The final report was presented to Parliament and published in June 2002.² The report shows how knowledge, experience,

and recommendations for political action can be achieved by direct dialogue at the grassroots level in developing countries.

As part of the study, the Study Commission decided to participate in a short Exposure and Dialogue Programme (EDP) with the Self Employed Women's Association (SEWA) in India.³ This was not the first time German MPs had participated in an EDP. However, as far as I know, this was the first time that an entire parliamentary body had taken the opportunity to participate in an EDP.

History of MPs' participation in EDPs

The first EDPs in which MPs took part were in 1985 and 1987. Several more took place between 1987 and 1997, most of which were hosted by the Grameen Bank in Bangladesh. However, planned lobbying for the participation of MPs really started after the 20th EDP hosted by the Grameen Bank, in 1997.

During the reflection phase of this EDP, Mohammed Yunus, founder of the Grameen Bank and 2006 Nobel Peace Prize Laureate, Karl Osner founder of the EDP Association, Mr Pinger, a German MP, and I as a staff member spoke about ways of ensuring that EDPs could become instruments of parliamentary work. The EDPs would be offered by self-help organisations and

¹ The workshop was held in Lehnin and Berlin, from 29 February to 3 March 2004. It was initiated by the EDP Association.

² German Federal Parliament printed paper 14/9200, 12 June 2002.

³ SEWA is an Indian organisation formed by women who are working in the informal sector.

banks such as SEWA in India, the Grameen Bank in Bangladesh, and CARD (the Centre for Agriculture and Rural Development) in the Philippines and Laos. Knowing what parliamentary work is like, and taking into consideration the tight schedules of the members, it was clear that a normal EDP of one week or more would be difficult for MPs. So we proposed specially designed short exposures on demand. The idea was that the opportunity to do an EDP could be offered to MPs on their way to, from, or during official visits. I proposed this in my exposure report, which was given to all MPs.

In 2000, a delegation of four members of the parliamentary Committee for Economic Cooperation and Development (AWZ) had an EDP with CARD. After this visit, the delegation sent a letter to the President of the Parliament recommending that these kinds of experiences be supported

More and more MPs took the opportunity to participate in an EDP. Parliamentary evenings were organised by the EDP Association during which MPs could interact with Mr Yunus from Grameen, Ms Bhatt from SEWA, and other leading people from EDP partner organisations.

The Study Commission EDP

From 7th to 16th February 2002, a delegation from the Study Commission visited the special administrative region of Hong Kong in the People's Republic of China. They then travelled to India, visiting Delhi, Bangalore, and Ahmedabad. In India, the visit primarily focused on the impact of the country's greater integration into world trade, especially in the IT sector, and aspects of development cooperation. For this purpose, a meeting with SEWA was also organised. During this time, delegates took part in a 2-day EDP. As part of this, delegates spent one day and one night in the houses of some SEWA members. During this time, they experienced their hosts' hardships first-hand by sharing some of their daily tasks and listening to their life stories.

Although agreed upon from the very beginning, it was still not easy to have this EDP realised for the Study Commission. Before leaving, not all of its members were convinced of its positive effects. In addition, the Administration and even the President refused experts' participation, even though they had full member status on the Study Commission, with equal rights and votes on the report and any recommendations decided upon. This situation changed when the President of

Parliament, who was also a member of the executive board of the EDP Association, sent a letter recommending EDPs for all working committees of Parliament.

Impact of the EDP

The experience of the EDP had a positive impact on the work of the Study Commission. The situation in developing countries and for their citizens became clearer and led to discussions on political recommendations. The experience of this short EDP with SEWA led to detailed statements and recommendations regarding micro-financing, combined with social security and support for women more broadly. It also referred to the role and economic importance of the informal sector. Another aspect of the recommendations was to maintain internationally sanctioned social and environmental standards.

This EDP also led to recommendations concerning parliamentary work itself. The final report presented to Parliament said officially and publicly that MPs should take the opportunity to combine their international talks and travels with a short EDP administered by Parliament. The Study Commission stated that, especially in times of growing internationalisation, networking, and interdependence, it is of great importance for Parliament to have an instrument like EDP at hand.

The current status of EDPs

Now, both a parliamentary body and its President recommend the EDP process. However, participation by MPs is still a question of having an intense personal interest and being able to convince contacts. As the German Parliament has not yet institutionalised this instrument of EDP, the role of the EDP Association is very important in informing members, preparing them, and helping them to reflect on what can be done upon return.

Working in Parliament, I try to support the EDP unofficially where I can. So we are headed in the right direction with a growing number of participants. But institutionalisation is still a long way off. EDP is an instrument to open eyes, hearts, minds, and thoughts. But it will constantly need people and infrastructure for providing information, and assisting with preparation and reflection on exposure and dialogue. It will need an organisation and time for lobbying in Parliament because political situations and challenges change – as well as Parliament members and majorities.

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With the strength of the powerless: using immersions for processes of structural change

by KARL OSNER

This article provides an insight into the role that immersions played in the pro-poor reform of the German aid system. This is a concrete example of how immersion can contribute to processes of structural change or 'reform from within' as Osner defines it. Nonetheless, it is highlighted that immersions alone cannot produce such change. Sustained effort, a multitude of cooperating actors, technical competence, and strong government backing are also required. Osner concludes by delineating possible ways forward for immersions to contribute to the shaping of a New Aid Agenda.

Introduction

This article highlights the role that 'immersions' – the direct encounter between key decision makers and poor people – played in the pro-poor reform of the German aid system. This includes the Federal Ministry for Economic Cooperation and Development (the BMZ) as well as its implementing agencies. I personally have been working since the early 1980s on the development of this methodology. I have worked on organising about 70 immersions of different types and duration, first as head of the BMZ Joint Working

Group and later with the Commission for Justice and Peace and its successor organisations.

How immersions came about

Immersions were developed, more or less simultaneously, in the early 1980s by two different institutions:

- the Joint Working Group 'Fighting Poverty through Participatory Approaches' of the BMZ; and
- the German Commission for Justice and Peace, a church-related NGO for development education, advocacy, peace issues, and human rights in Germany.

Given the unsatisfactory results of poverty alleviation during the first two decades of German development cooperation and the differing development aid ideologies, the challenge was to find ways and means to improve the impact of the German aid system. We wanted to create – through dialogue with civil society – a general consensus on the basic issues of pro-poor participatory development policy and practice.

The trigger for the BMZ's initiative was a cross-sectional evaluation of the 80 state-owned development banks. These had been promoted for many years under financial development cooperation with an annual amount equivalent to 150 million euros. The result of the evaluation sent

shockwaves through the Government, forcing the BMZ to react. The evaluation showed – exemplified in concrete **figures** – that the average final loans of amounts equivalent to 60,000 euros did not actually reach the poor people in the countries concerned. As a result, in 1983, the BMZ established the Joint Working Group with the mandate of proposing viable solutions to improve official aid instruments – especially financial ones – and promote participatory approaches and self-help. In this way, the target groups of development cooperation – the poor – could be reached and benefit directly from the official assistance provided.

Structural changes in national policy mean changes in the three interrelated dimensions that determine a ‘**structure**’:

- changes in pro-poor development policy;
- changes in promotional concepts or administrative regulations (i.e. **instruments**); and
- changes in the daily **practice** of development cooperation, which depend in large part on the **mindset** and **behaviour** of the ‘bureaucrats’ responsible for this policy.

In a way, the process which took place in the German development administration between the 1980s and 1990s can be seen as an attempt to reform **from within**, using participatory means. It tried to discover to what extent and under what conditions the administrative system could be renewed.

What is an immersion?

Immersion, in the German context, is a **person-to-person encounter**. During an immersion, people from developed countries or people who are relatively well off stay for a few days with people who live in poverty and are struggling to achieve a decent life by their own efforts. It is a short, *in situ* encounter with the reality of poverty and exclusion.

For the visitors, the immersion process marks the beginning or the deepening of a personal path. If successful, it leads step-by-step to personal answers to many questions such as:

- Is this the way I imagined poverty to be?
- What links me to the person I am encountering during the immersion? Is it more than compassion?
- Has my will to express solidarity with the poor in a practical way increased?
- Have I expanded my competence – whatever it may be – to find efficient solutions in the fight against poverty?

And also:

- What inner commitment am I making towards this person who has granted me her hospitality and received me in her house?

“... the challenge was to find ways and means to improve the impact of the German aid system. We wanted to create – through dialogue with civil society – a general consensus on the basic issues of pro-poor participatory development policy and practice.”

- Do I actually want to go that far?

An immersion normally lasts 5 to 8 days and is structured in three phases:

- immersion;
- reflection;
- dialogue.

Immersion

In the first phase of the encounter, visitors live with the host family for 2 to 3 days in groups of two, preferably a man and a woman. They participate in the host’s daily life, in the work that needs to be done in the house, land, or community. They live, eat, and sleep – when possible – with their host family. Facilitators, i.e. expert intermediaries for communication, ease this encounter.

Reflection

In the second phase, visitors as well as hosts and facilitators reflect for 1 to 2 days on their immersion, individually and jointly. This phase is about deepening the significance of their experiences:

- What is not just coincidental or unique but **exemplary and typical**?
- How is the micro level linked with the framework and conditions of the macro level?

The reflection and dialogue are based on participants’ experiences. They speak about and reflect on their encounter. **This is a strictly inductive process.**

Dialogue

In the third and final phase, also lasting 1 to 2 days, all the immersion’s actors come together: host families, visitors, facilitators, and the host organisation. Now it is a question of summing up, concluding each person’s own work, and starting the follow-up process.

Although these three phases take place in succession,

“Policy makers and decision makers who have taken part in immersions have substantially contributed to the adoption of innovative, pro-poor policies and concepts in the BMZ.”

they are practised **continuously** in each component of the programme. Participants are always in dialogue, with their hosts and their exposure partner; there is always something happening that invites them to reflect.

Where we are now? Conceptual developments and outcomes

An analysis of the path covered since the early 1980s shows four main processes in the reform of the German aid system. Ultimately, these also determined the methodological development of immersions. These processes (described further below) are:

- personalisation of the poverty issue;
- acquisition of appropriate technical competence;
- structural integration and impact; and
- growing institutional spread.

Personalisation of the poverty issue

Through the experience of meeting poor people face-to-face, participants in immersions go through a process of **personalisation** of the poverty issue and commitment to action. Immersions also deepen insights into the creative potential of the poor, something that is indispensable in the shaping of pro-poor policies. These moving insights into the struggle of those trying to overcome poverty can inspire participants to support the efforts of the poor.

Since the first immersions took place in 1992, more than 800 participants in total have taken part. Participants have been mainly key persons such as members of parliament and decision makers from the BMZ, development organisations, and civil society. Their willingness to participate can be seen as an expression of a felt need and a personal interest to meet poor people person to person, and to get first-hand insights into their strategies for overcoming poverty.

Acquiring appropriate technical competence

Immersion can be beneficial in improving the technical competence of key development actors in shaping instru-

ments to promote pro-poor development. The recognition and inclusion of microfinance as a component of the BMZ's Financial Aid System is one example. Eight technical immersions with innovative micro-banks were held between 1992 and 2001, involving about 150 specialists in microfinance and members of the Joint Working Group. These provided the basis for the introduction of this pro-poor strategy.

Structural integration and impact

Policy makers and decision makers who have taken part in immersions have substantially contributed to the adoption of innovative, pro-poor policies and concepts in the BMZ. These include 'Fighting poverty through participatory approaches and self-help'. This was elaborated in an intensive dialogue with some of the main immersion partners, namely SEWA (India), Grameen Bank (Bangladesh), and WOTR (Indo-German Watershed Development Programme).

The change in the rules governing the Financial Cooperation Budget, which made it possible to support participatory projects using grants instead of repayable loans, is another example. The allocation of 15% to 18% of the overall budget for bilateral cooperation to participatory pro-poor projects is yet another.

One important administrative regulation was the internal BMZ 'Directive for determining the poverty orientation of a programme', enacted in 1997. This directive is the formal basis for determining the proportion of funds allocated to pro-poor development cooperation.

These examples show the structural impact immersions can have.

Institutional use and spread

The example of the Joint Working Group of the BMZ in the 1980s suggests that a governmental institution such as the BMZ can use immersions as a tool that – together with other instruments such as case studies, action research, or policy dialogue – contributes substantially to initiating and implementing the reform of an administrative system **from within**. The vital contribution of immersion is that it motivates and predisposes senior officials and other staff to adopt a participatory approach.

Potentials and limitations of immersions

A number of institutions are now using immersions as a tool for promoting pro-poor development. The wide range of thematic and institutional applications for immersions, particularly when combining them with other instruments, is impressive. On the other hand, the fact that, at present,

only one donor government – Sida – has adopted immersions as an instrument for shaping its development policy is disappointing.

There is strong evidence that immersions help to gain access to the existing self-help potential of the poor. They can also deepen insights into processes for building participatory institutions and organisations which support the poor, decreasing their vulnerability to poverty as they move towards self-reliance. As the experience of the Joint Working Group of the BMZ has shown in the field of microfinance, these insights can be transformed – through systematic analysis, reflection, and dialogue – into incentives for the shaping of pro-poor policies and principles.

As an ongoing component of a specific process, immersions can stimulate or even induce reflection on the status quo and on change. They can help identify new ways of considering the real needs of the poor and make sure that they are the **subjects** of their own development.

Experience has shown, however, that immersions cannot produce institutional and structural impacts on their own, particularly not in just one programme. Institutional and structural changes are complex in nature and require **sustained** efforts and a multitude of actors for their accomplishment.

The acquisition of a specific **technical competence** for moulding concepts, promotional instruments, and mechanisms can be considered as a critical pre-condition for a sustainable impact and the spread of immersion as an institutional tool.

Finally, the reorientation of German development policy would not have happened without strong backing from the German Parliament. This support was built through the participation of Parliamentarians in immersions and the invitation of Muhammad Yunus (Grameen Bank) and Ela Bhatt (SEWA) to two public hearings. Subsequently, policy guidelines were deliberated by the Parliament in three plenary sessions.

The future

The New Aid Agenda

One of the most far-reaching changes in development cooperation in the past few years has been the transition from **project** aid to **programme** aid and the introduction of **budget** aid. Budget aid is combined with the expectation of improving the impact of development cooperation in terms of poverty reduction and growth through increased aid efficiency.

“Experience has shown, however, that immersions cannot produce institutional and structural impacts on their own ... Institutional and structural changes are complex in nature and require *sustained* efforts and a multitude of actors for their accomplishment.”

There are three preconditions for the successful implementation of the New Agenda.

- A real commitment to reducing poverty by the recipient country's government.
- Agreement on basic principles and priorities between the government of the recipient country and key local actors. This includes above all the **active participation** of the membership-based organisations of the poor and representatives from local self-government.
- A consensual agreement on the priorities and conditions of cooperation between the recipient country and the donors, which recognises the ownership of the recipient country and is based on **partnership**.

Can immersions contribute to the practical shaping of such a demanding agenda in a meaningful way? Can existing immersion experiences help to conceptualise and complement existing instruments without stretching its potential too far? Can a way be found to multiply successful experiences through cooperation among the users and implementers of immersion?

This is a demanding agenda and I do not pretend to be able to answer all the questions that arise. The following reflection is no more than a beginning!

The role of immersions

The three preconditions for a successful New Aid Agenda mentioned above can benefit from the building of interpersonal linkages:

- Government decision makers can develop **interpersonal relationships** with poor people by meeting them person to person. They can combine their encounter with focused learning about the real needs and potential of the poor. The results of an immersion can find expression in a deeper personal commitment, which may have an impact on pro-poor decision-making.
- Immersions can be used for building **interpersonal relationships** between government representatives and repre-

representatives of civil society, especially people from membership-based organisations and movements of poor people. It can give them the opportunity to meet together around a selected sectoral reality, e.g. micro-insurance, primary education, or health. The impact of successful encounters and informal dialogue can be an improved understanding of people's needs and – again – of their potential and limitations. It can also result in **increased trust** between the actors, something from which the official national dialogue between Government and civil society can benefit.

- Joint immersions involving representatives from the recipient country and donors can contribute to **interpersonal linkages** from which the idea of a relationship based on **partnership** can emerge. Informal 'round tables', in which representatives from membership-based organisations, participatory NGOs, and research institutions may also participate, can substantially contribute to the creation of mutual trust based on the recognition of everybody's role and responsibility.

In this conceptual approach the notion of **interpersonal**

"It is not used just for the sake of dialogue or networking, but because of its contribution to the practical functioning of the relationships: it is the human element that makes institutions and inter-institutional linkages work."

linkages is used to underline the practical relevance of the suggested approach. It is not used just for the sake of dialogue or networking, but because of its contribution to the practical functioning of the relationships: it is the human element that makes institutions and inter-institutional linkages work.

This approach is based on the **culture of dialogue** – dialogue between decision makers and the poor, dialogue between state and society, and policy dialogue between the recipient country and the donors. Hopefully, it may inspire the structures of development cooperation.

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NOTE

A longer and more detailed version of this piece is available from Karl Osner.

Closing editorial

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Immersions: reflections on practice

by **IZZY BIRCH** and **RAFFAELLA CATANI**

In this closing article we will review 'good practice' in relation to immersions, while also noting the difficulties in reaching any meaningful assessment of their long-term impact. We will discuss the ethical dilemmas they raise, and argue that the next phase of immersion practice should find more creative ways of letting the voices of the hosts be heard, and of trying to answer the question posed in the introduction: 'What would those living in poverty want us to do?'

Introduction

Our aim in preparing this special issue of *Participatory Learning and Action* has been to communicate the diversity of immersion experience through the voices of those involved. As we near the end, it is for readers to draw their own conclusions about the limitations and potential benefits of the approaches discussed here. We can see that a critical mass of interest and energy has now been generated among donors, NGOs, and practitioners. The concern they all share is the ever-widening gap between those who choose to tackle poverty and those obliged to live it. For many of those who have shared their experience through this issue, immersions are one way of trying to reduce this gap.

Elements of good practice

As Robert Chambers wrote at the beginning of this issue, there is no single formula. Each reality check, each EDP, each immersion has its own taste and flavour. The basic ingredients of host and visitor, and the environment within which the two interact, make up a recipe that is constantly changing. Nevertheless, although there is no one template to follow, most effective immersions share similar qualities.

Adequate investment in preparation and orientation

Organisations which arrange immersions for others, such as SEWA and ActionAid, try to ensure that immersion participants receive a thorough orientation on the village they will be visiting and the family with which they will be staying. They also prepare the host community and host families, briefing them on their guests' interests, and emphasising the importance of treating them as equals. Even those who organise immersions on their own initiative take the time to familiarise themselves with the culture and context of the place they are visiting. Of course, the degree of orientation varies according to the needs of those involved: a European Member of Parliament on her first visit to a rural village in Asia may require a different level of support from an experienced EDP participant.

DfID staff and local government representatives meet the village doctor for lunch during an immersion in China.



Photo: ActionAid

However, familiarity should not be assumed. When appointing new staff, Indian NGOs such as PRADAN and SRIJAN organise a prolonged stay for candidates in a village environment precisely because of the cultural and class divide between many of their applicants and the rural poor. Jörg Hilgers writes of Tanzanian government officials who, after an EDP in 2007, came to appreciate the gap between their lives in the capital and the 'colour and taste' of poverty. No-one, as Ravi Kanbur eloquently reminds us in his story about the temple in Ganeshpura, has nothing left to learn.

Appropriate facilitation and interpretation

In most cases some kind of bridge is needed between the worlds of host and visitor. This may be provided by a skilled facilitator and/or interpreter, often mediated through a local

NGO. In some cases this bridge has to span a chasm – the wide gulf in life chances between different human beings. For those who genuinely seek to understand what lies on the other side, immersions can be profoundly emotional experiences. So experienced facilitation is essential. Dee Jupp concludes her article by noting that immersion facilitators may best be sought from those with a background in counselling or mentoring.

Organisations that arrange immersions need to be aware of the powerful position they hold. Some may plan the event in ways that reinforce their own agenda, consciously or unconsciously reproducing certain biases through their choice of location or community. Visitors need to be aware of the possibility of being misled. Facilitators and interpreters also have a difficult balancing act. Their work is critical to the success of an

Getting to know each other: an immersion in Khosolo, Malawi.



Photo: ActionAid

immersion, but they must avoid overstepping their roles as mediators. In the words of the EDP Association, interpreters should be 'there but not there'. They are 'the mirror through which the host and the guests look at each other'.

But facilitation is not simply about helping visitors deal with the shock of the new. It aims to ensure that participants maximise what they learn from the experience. What does this learning involve? The personal testimonies in Section 3 give us some idea. Despite the rhetoric that surrounds immersions – of 'learning from the poor' – it is often richness rather than deprivation that lingers in visitors' memories. Saleiha Chachi, whose home is a remote island in Bangladesh, 'inspired' John Samuel:

She symbolises the thousands of unsung, unheard, and invisible leaders, both women and men, who make change happen.

For Taaka Awori, poverty

...ticked my consciousness at the fringes but never came and took a front seat... For 3 days the greetings, the family meetings, and the stories revealed a positive side of African culture that I knew existed but had forgotten.

Bosse Kramsjö writes that during follow-up seminars for participants in the Global School, people 'don't feel pity; they miss friends they will probably never meet again'. Good facilitators help visitors and hosts recognise what they have in common, as much as what divides them.

A willingness to embrace the personal and the unexpected
The reactions of participants are often unashamedly

emotional. Almost all of those who have written about immersions emphasise that it is the combination of heart and head that changes practice. James Wolfensohn, writes Fred Nunes, wanted managers in the World Bank with both emotion and intellect. Bosse Kramsjö acknowledges that some will dismiss 'the emotional part' as 'software nonsense', but then asks how can people's thinking shift without emotional involvement?

Some of the most profound learning and change results from experiences that are unplanned. Those organising immersions need to find the right balance between preparation and flexibility. Immersions are essentially opportunities for experiential learning. They require participants to 'let go', to set aside the trappings of status and profession and simply engage with others as human beings. Immersions create the space within which this kind of interaction can happen.

Legitimisation from employers and managers

But emotion and happenstance take us only so far. Immersions should be more than feel-good experiences for development workers in need of rejuvenation. At some point they must be justified in terms which go beyond the individual – i.e. for their contribution to more effective projects and programmes and for their influence on policy. The articles by Poonam Shroff, Haider Yaqub, and Qazi Azmat Isa illustrate their potential value in these respects. Once immersions receive the support and endorsement of employers and senior managers, as has happened in Sida, they move beyond the preserve of the converted and become accepted organisational practice.

The preliminary findings of the Sida Reality Check Field Team in Bangladesh demonstrate why this matters. They give specific instances in which the experience of living with ordinary families, even for just a few days, throws new light on old assumptions about poverty-reduction strategies and highlights important policy implications. Those employed in aid and development agencies find themselves further removed from their ultimate clients than ever before. This may be due to shifts in donor priorities in favour of budget support and harmonisation, or the growing bureaucratisation of development practice. So strategies which consciously make space for this kind of direct contact are crucial. This is as true for officials in Southern governments as it is for the staff of foreign donors, particularly with the commitment, rhetorically at least, to devolution and partnership that characterises the 'New Aid Agenda' (Karl Osner).

Ethical dilemmas

The concept of a 'good' immersion is problematic, since immersions also pose many ethical questions. Common to all immersions is a period of time living with a host family in a poor community, helping with household tasks and sharing in their lives. The most obvious dilemma, then, is whether the inevitable short-term burden on host families is compensated by the possibility of better policy and practice in the long term. And who assesses this trade-off?

The views of host families are difficult to hear. It is the threads of the visitors' reflections which are woven into stories and reports circulated to colleagues and managers on return, while their hosts slip back into relative obscurity. For the purpose of this issue we asked some of those who organise immersions to go back and talk with host families about their experiences. The results, a selection of which are included in Section 2, were interesting but possibly compromised: would host families have felt comfortable to speak freely, given the power that organisations such as SEWA and ActionAid undoubtedly exercise in any village where they work? As Ashish Shah writes, immersions are just as vulnerable to the same power dynamics as any other intervention, and must be built upon a pre-existing foundation of transparency and trust if they are to be meaningful.

The clearest impact on host families is the extra physical and financial burden on already poor households, particularly on women. For them, the burden of domestic and productive work is already great. But there are other, less obvious pressures: the intrusion into people's privacy and the subsequent publication of those conversations, as well as the anxiety felt by hosts for their guests' well-being and safety. As the SEWA members acknowledge, harsh physical labour in tobacco fields or on building sites no doubt gives visitors a unique insight into the hardships of their lives, but it also adds to their worries.

There are several responses to this dilemma. One is to find ways of reducing the burden. When immersion participants ask to help with household chores, this is not just to learn how heavy the water is or how back-breaking the weeding. It is done with the genuine intent of minimising the family's workload (even if in practice the results are less than perfect, as Ramilaben, a SEWA member, remembers). Financial needs are dealt with discretely. Organisations which facilitate immersions generally forbid visitors from paying their hosts or giving them gifts. But they ensure that families receive financial assistance or essential material support in advance of their guests' arrival. For rural societies where hospitality to guests is still a highly valued cultural norm, direct payment risks

Sonya Ruparel and Kate Newman with village children during an ActionAid immersion in Bangladesh.



Photo: Sonya Ruparel & Kate Newman

being seen as disrespectful or patronising. Some may interpret it as a way for those from relatively privileged backgrounds to assuage their guilt. But we also know of several individuals who use quiet back channels to demonstrate, anonymously, their appreciation to the communities which hosted them, and who regard this as a concrete expression of solidarity.

Another response is to design immersions in ways that bring about some practical benefit for host families. During the Views of the Poor study in Tanzania, some families learnt for the first time about their entitlements – that schooling was now free, or that they could get free or subsidised medicines. Most of the families who took part in the study had never been asked their opinion before. Host families, particularly the most marginalised, often report that opening their homes to guests raises their self-esteem and their status among their peers. Poor preparation, on the other hand, can leave hosts vulnerable to the ill-will of neighbours who assume that they have received significant monetary benefits. But when all involved have been well prepared, the experience can be positive. Long-term friendships have even been built.

Another factor should be considered when weighing up the burden on women. By bringing visitors right into the home, immersions offer insights into issues of gender and power which would otherwise be less apparent. In many cases, the standard Village Immersion Programme (VIP) visits undertaken by senior government, donor, or NGO officials take place in the public sphere. In many rural areas in particular, this is still the preserve of men. The VIPs will meet with a range of local dignitaries – the district commissioner, the head teacher, the chief, the priest – almost all of whom will be men. But in an immersion these same senior officials – many of

“Immersion should be more than feel-good experiences for development workers in need of rejuvenation. At some point they must be justified in terms which go beyond the individual – i.e. for their contribution to more effective projects and programmes and for their influence on policy.”

whom are also powerful men – are brought right into the home, which in most cultures remains the preserve of women. They are encouraged to look at the world through their host woman's eyes – to do what she does and to hear what she says – and in so doing they may gain very different insights. This process may need careful facilitation – on the one hand ensuring that the visitors appreciate this dynamic, and on the other supporting the women through the encounter.

But is it right to make these intimate relationships public property? Jörg Hilgers and Karl Osner describe how essential the phases of reflection and dialogue are to the EDP methodology, when participants make sense of what they have learnt through group-based discussion. Sonya Ruparel also highlights the value of shared reflection and triangulation. If the benefits of immersions are ever to reach beyond the individuals who take part, then their implications and conclusions must be more widely shared. Moreover, most participants seem to feel strongly that naming their hosts and celebrating their lives in what they write after the event is a way of honouring them. And yet, as Edward de Bresnyan cautions, the expectation that one must share publicly what was learnt privately can be an uncomfortable one:

... the instrument of our own learning is in fact the life of another human being, who has offered herself as an instrument of instruction.

Impact assessment

Another theme that runs through several of the articles is the difficulty of assessing the impact of immersions over the long term. The stories that we hear are just that – a snapshot, a glimpse, however striking or memorable into another person's world. Their power and impact on the individual visitor is not in doubt. Renwick Irvine, governance advisor with DfID in Nigeria, writes that:

Not a day goes by when I don't think about the week that I spent in Katsit and refer to it frequently in my work, in my discussion with government on policy issues.

However, we have little sense yet of the sum total of all this effort. Jörg Hilgers acknowledges that the EDP Association 'has not yet managed to measure personal and institutional impacts in a systematic and scientific way.' SEWA plans to set up a dedicated EDP unit, and one of its objectives will be to address this challenge. The articles by Fred Nunes and Sonya Ruparel illustrate some of the challenges in institutionalising immersion practice, even with leadership from the top. Turnover of staff, competing incentives, and rapid shifts in development fads and fashions can make it hard to sustain changed practice. Karl Osner acknowledges that after several decades of effort and experimentation only one official donor – Sida – has made a commitment to use immersions and reality checks to shape its development policy.

Impact assessment will also be problematic if the objectives of immersions are contested. Are they necessarily and only about understanding the lives of the poorest? As Ashish Shah suggests, while it is important to understand the perspective of a woman shunned by her in-laws to live her life in isolation, it may be equally important to understand the challenges faced by a rural government officer with no resources to work with. The aim of reality checks may rather be to capture as many diverse world views as possible, all of which help us craft a more honest and inclusive understanding of 'reality' and hence inform what we do.

One way in which the impact of immersions may be enhanced, particularly on policy development, is by arranging joint immersions which pair key staff from government, donor, or civil society organisations. Living and working together in a more informal setting may help build trust and understanding between actors. And the discussions and encounters during the immersion may provide a shared experience on which both can draw in subsequent policy dialogue. As Karl Osner writes, it is the 'human element' that makes institutions work effectively together. Immersions perhaps provide an environment where these personal ties can be strengthened.

The unique and highly personalised nature of immersions makes their impact assessment a particular challenge. And yet it is this aim of 'personalising' poverty that is one of their most valued outcomes. 'Making Poverty Personal', is the title of an ActionAid publication on immersions. 'Development has got a face', is EDP's motto. As Reema Nanavaty writes, the relationship between 'donor' and 'beneficiary' has

become so abstract and impersonal. Something is needed to restore a stronger sense of connection between the two, to counteract the bureaucratic culture which looks 'inwards and upwards, not downwards and outwards'.

Where next?

Immersion, EDPs, and reality checks are still in their relative infancy, for reasons explored in the introduction. As a result, participants have until now been largely self-selecting – those, perhaps, already predisposed to honest reflection and questioning of the limitations of their practice. The challenge is to move beyond the converted, and to create a climate in which direct contact with those we serve, in whatever form this takes, is regarded as essential rather than exceptional in how we think about accountability and understand good practice.

There are optimistic signs. The renewed sense of energy behind the World Bank's Village Immersion Programme in South Asia; SEWA's decision to set up a dedicated EDP Unit; the commitment by Praxis to support learning across a network of practitioners interested in immersion. In the coming years we need greater investment in peer review mechanisms and processes which spread good practice and in some way capture the cumulative impact of immersion. A crucial part of this must involve listening more carefully to the experiences and priorities of hosts – particularly those

"One way in which the impact of immersion may be enhanced, particularly on policy development, is by arranging joint immersion which pair key staff from government, donor, or civil society organisations."

whose voices are rarely heard.

Phebe Oriaro, who stayed with a rural family in western Kenya in March 2005, wrote that:

Contact with very poor people is never easy. They rarely attend meetings. Their leaders will. If they attend, then they will not talk. To make them talk and be heard, we may be forced to go an extra mile.¹

Immersion are simply one way of trying to go that extra mile. If this issue succeeds in tempting more people to make that journey, and to learn for themselves about this thing called 'immersion', then it will have achieved a little of what it set out to do.

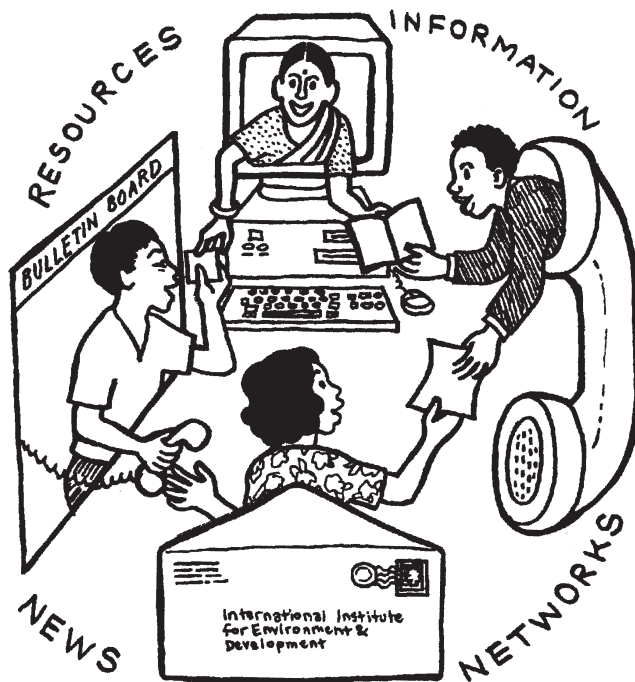
¹ *Mwangaza*, Issue 3, June 2005, ActionAid Western Region team.

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in touch



Welcome to the In Touch section of *Participatory Learning and Action*. Through these pages we hope to create a more participatory resource for the *Participatory Learning and Action* audience, to put you, as a reader, in touch with other readers. We want this section to be a key source of up-to-date information on training, publications, and networks. Your help is vital in keeping us all in touch about:

- **Networks.** Do you have links with recognised local, national or international networks for practitioners of participatory learning? If so, what does this network provide – training? newsletters? resource material/library? a forum for sharing experiences? Please tell us about the network and provide contact details for other readers.
- **Training.** Do you know of any forthcoming training events or courses in participatory

methodologies? Are you a trainer yourself? Are you aware of any key training materials that you would like to share with other trainers?

- **Publications.** Do you know of any key publications on participatory methodologies and their use? Have you (or has your organisation) produced any books, reports, or videos that you would like other readers to know about?
- **Electronic information.** Do you know of any electronic conferences or pages on the Internet which exchange or provide information on participatory methodologies?
- **Other information.** Perhaps you have ideas about other types of information that would be useful for this section. If so, please let us know.

Please send your responses to:
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 IIED, 3 Endsleigh Street, London
 WC1H 0DD, UK.
 Fax: +44 20 7388 2826;
 Email: pla.notes@iied.org

Books and other resources on the theme of immersions

Organising an immersion in ActionAid

● ActionAid International, 2006.

ActionAid International (AAI) has recently put together this resource pack. It documents ActionAid's growing experience in immersions, and is also a guide for those involved in coordinating such events on its behalf. Since 2003, AAI has been regularly organising immersions with the support of local partners all over the world for both internal and external purposes. The resource pack has a step-by-step structure, which describes how to organise a successful immersion in AAI, drawing from previous lessons learnt.

This is a learning-by-doing process and, as such, it is ongoing. For this reason, the pack itself is under continuous revision and subject to change, made in light of new experiences.

■ For updates on this process, its documentation, and to exchange related experiences, please contact: Sonya Ruparel, ActionAid, Hamlyn House, Macdonald Road, London N19 5PG, UK. Tel: +44 20 7561 7653; Email: Sonya.Ruparel@actionaid.org

The Self Employed Women's Association (SEWA) Exposure and Dialogue Programme (EDP) Tool Box

● Namrata Bali and Karl Osner
 SEWA, 2007

The Self Employed Women's Association (SEWA) is a prominent women's trade union in India with

more than 900,000 members. SEWA has been developing its own immersion programme, the Exposure and Dialogue Programme (EDP), since 1991. This is as a result of its cooperation with the German Ministry for Economic Cooperation and Development (BMZ), the German Parliament, the German Commission for Justice and Peace, and the EDP Association.

EDP has a considerable structural impact in SEWA. It serves to protect SEWA's original mission as an organisation of very poor women, to train new SEWA leaders from SEWA's own ranks, and to expand the organisation in India. In addition, it helps bring the overall national political environment more in line with the needs of the poor and the poorest in the informal economy. SEWA is also using the immersion methodology for shaping international dialogue programmes.

As a part of their ongoing cooperation, Namrata Bali (SEWA Academy) and Dr Karl Osner (Ex-BMZ officer and founder of EDP Association) have been working for the last five years on a Tool Box to enhance EDPs in SEWA. This EDP kit is the result of the experience gained by SEWA in organising EDPs and Dr Osner's contribution to its methodological progress. The Tool Box currently comprises of four general guidelines on EDPs at SEWA – guidelines for 'host ladies', facilitators, external participants, and organisers – and two more documents on specific types of EDPs:

- Guidelines for shaping EDPs combined with international conferences, based on EDPs jointly organised by Cornell University – WIEGO and SEWA Academy – on a regular basis since 2002; and,

- Guidelines for analysing vulnerability, life cycle shocks and events, and coping strategies of SEWA members through EDPs – jointly organised by VimoSEWA (SEWA Insurance) and SEWA Academy.

■ For more information, please contact Namrata Bali at SEWA Academy (India), Email: sewaacdy@icenet.co.in or Karl Osner, Email: osnerkarl@yahoo.de

Stop and pause: HIV/AIDS theme video

● ActionAid Kenya, 2007

As part of their Participatory Reflection and Review Process, in February 2007, ActionAid (AA) staff spent a week with people living with or affected by AIDS/HIV in Usigu (western Kenya). The AA team included international and national staff members from a wide range of disciplines. Most of the hosts chosen were women. Their experiences – as described by those who lived it – generated contrasting feelings and emotions: sorrow and joy; despair and hope; anger and peace. And above all, it has led to new and critical learning imparted by the real holders of that knowledge, the affected communities. The process – as well as the human dimensions of this thematic immersion – is documented in this amateur video.

■ CDs are available from AA Kenya. For more information, please contact: Leonardo Okello, Email: leonard.okello@actionaid.org and/or IASL Team, Email: iaslteam.jhb@actionaid.org

Plan Bangladesh's Handbook on Child-Centred Community Development

● Plan Bangladesh, 2004.

Based on its field experience, Plan Bangladesh has been developing a

systematic, holistic approach and framework to enhance the capacity of poor children and their families to better their life conditions and community. This working framework is known as Child-Centred Community Development. It is based on principles of equity and people's empowerment.

Participation and true interaction among Plan staff members, children and their families are crucial steps in this process. Special attention is devoted to establishing and strengthening human relationships, and the practice of immersions has been identified as the most appropriate. It is applied throughout the process cycle (i.e. preparation, situation assessment, planning, resource mobilisation, implementation, and monitoring and evaluation).

By sharing time, experiences, and values with some of the families in the community, Plan members initiate the process of mutual learning and building of trust. The community becomes more familiar with the staff, Plan's mission, and its work. In turn, staff members develop an experiential understanding of the community dynamics and its reality perception. Different techniques and attitudes are recommended in order to make each immersion as informal and fruitful as possible. More details and a comprehensive overview on this approach are provided in this handbook.

■ For more information, or for copies of the manual, please contact: Haider W. Yaqub at Plan Bangladesh, Email: Haider.yaqub@plan-international.org

Bangladesh – a quest for reality **Bosse Kramsjø**

● Shamunnay/The Swallows, 2000
ISBN: 984 31 0698 3.

This book is not just a truthful account of the contradictions of a poor but

fertile country like Bangladesh. It is also an important eye-opener and reminder – for those already aware – of the unjustifiable contradictions that exist in international development aid. The author writes of his first-hand experience in the development community in Bangladesh. He describes a symptomatic gap between what aid workers think they know – and what poor people's realities truly are.

Although experiences like immersions are not directly described here, many of the questions raised throughout the book are closely related to the promotion of practices like immersions:

- Whose reality counts?
- Who is the real development expert?
- What does development mean and for whom?
- To what extent are development aid and its operators accountable to primary stakeholders?
- How often do development experts create quick opinions or bias based on feelings and guess?

The book is published by the Swedish NGO, The Swallows, and the Bangladeshi research organisation, Shamunnay.

■ Available from: Centre for Science and Environment, Bookstore, Core 6-A, 4th floor, India Habitat Centre, Lodhi Road, New Delhi-110 003, India. E-mail: cse@cseindia.org

General books and resources on PLA

Springs of participation: Creating and evolving methods for participatory development

● Edited by Karen Brock and Jethro Pettit
Practical Action Publishing, 2007



ISBN 978-1-853396-47-2

Participatory tools and approaches only come alive through use. In the hands of principled and committed

practitioners, tools can have real success in opening new space for discussion and action. This carefully compiled and stimulating volume draws together first-hand practitioners' accounts of the genesis and development of specific participatory approaches, including Reflect, the Internal Learning System, PALS, and Stepping Stones.

The various chapters are all interesting in their own right and will appeal to readers looking for thoughtful insights into well known challenges of participatory methods:

- how to make the best of differences in power among participants and practitioners;
- how to link effectively with formal survey methodologies;
- how to share attitudes and values as well as tools and techniques during training; and
- how to meet external needs without putting local needs in second place.

What binds the diverse chapters is a common philosophy that participatory approaches are less useful if static and formulaic. They need to be in a perpetual process of reflection, refinement, and adaptation – which can only be done effectively if there is subtle understanding of users and their contexts, but also appreciation of the hows and whys of the approach itself. To show us how a particular participatory approach has come to its present character, each

author takes a historical view, charting a personal as well as a shared journey of learning and adaptation. A chief pleasure of the volume is the practitioners' clear-eyed, constructive self-criticism, made sharp by their avoidance of too much theory and difficult language.

Though the contributions all arise from a single workshop in 2005, the book deserves a long shelf-life, as it draws out from the approaches under scrutiny many lessons for us to apply in our own work. At the same time it reminds us through example that every practitioner's experience is unique.

Reviewed by Sonja Vermeulen, Senior Researcher, Forestry and Land Use Programme, IIED.

■ Available from Practical Action Publishing, Schumacher Centre for Technology and Development, Bourton on Dunsmore, Rugby, Warwickshire, CV23 9QZ, UK. Website: www.developmentbookshop.com

Building capacity through financial management: a practical guide

● John Cammack
Oxfam GB, 2007

This book is part of the Oxfam Skills and Practice series. Based on the premise that sound financial management is a key to achieving a more effective organisation, the book presents practical ways to build financial management capacity in an international development context. The book is written for non-governmental organisations (NGOs), larger community-based organisations (CBOs), and charities. It is primarily about building capacity, rather than how to do accounting. As an independent consultant and trainer working internationally, John Cammack believes in providing practical tools that enable

cross-cultural learning. He was previously head of finance for Oxfam GB, is a qualified accountant, manager, and teacher and holds both an MBA and an MSc in international development.

The book is divided into the following four parts:

- Linking capacity-building and finance;
- Building financial management capacity;
- Moving towards sustainability; and
- Tools for building financial management capacity.

There are also two appendices containing forms to aid in the review and assessment of an organisation's financial capacity, a glossary of terms, a list of relevant websites and one of suggested further reading, and an index. Each of the book's parts builds on the other, but the fundamental elements of good financial management are repeated throughout, so one needn't read the book from start to finish to understand its key messages.

Part 2 on Building financial management capacity is the longest of the book. It provides a great deal of its important substance. Section by section, it walks through each of the significant functions of a financial management system from planning and budgeting to external audit and broader organisational concerns. At the back of each of these sections is a table listing common concerns and possible solutions. Part 4, Tools for building financial management capacity, rounds out the book nicely with a simple but comprehensive toolkit and analysis of training requirements to help implement the ideas and concepts set forth earlier in the book.

The book is written in plain English with short paragraphs that are clearly labelled. Where financial and

accounting terminology is used, it is defined, and illustrative examples and case studies interspersed throughout help bring the author's points to life. Cammack's hands-on experience with international development organisations is evident. He has a good grasp of the varying financial and capacity needs of different-sized organisations as well as those of the providers and users of financial information.

While the book discusses the different points of view of the multiple actors in a financial management system, it is pitched to a reader with management level skills and experience – an individual capable of making choices and decisions for an organisation. I can recommend this book to that individual. For a small book, it covers a wide range of topics comprehensively but simply, and it ably makes the case for why strong financial management systems are important to development organisations. The book will appeal to managers of NGOs and CBOs in most parts of the world and shouldn't become dated any time soon. I suggest that the book be read once straight through. Its independent parts can then be used as reference material depending upon the organisation's current situation.

Reviewed by Linda Siegele, Staff Lawyer, Foundation for International Environmental Law and Development (FIELD). FIELD is a working subsidiary of IIED.

Where there is no artist: development drawings and how to use them (Second Edition)

● Petra Róhr-Rouendaal
Practical Action Publishing, 2007
ISBN: 978-1-85339-613-7

Drawing is one of humanity's oldest



means of expressions, yet never before has there been more diversity in the way we produce images. This is good news for development

communication, and in *Where there is no artist* we have a resource that amply explores the way art can be used in this field. It's an accessible book that is useful for everyone with an interest in drawing and development issues.

Here drawing is recognised as a tool to communicate with others, regardless of language, culture, or nationality. Visual images are used as a common language to help express thoughts and emotions. The book offers practical examples of how drawn visual aids can encourage their viewers to be relaxed but also inquisitive and imaginative in playing out the various possibilities that the narrative could take, especially in terms of their own experiences.

A variety of traditional drawing methods and tips on drawing skills — for example, portraits, profiles, expressions, and body language — are included, with expressive drawings throughout.

For drawing to be used as a learning tool, there must be a way in for the viewer to understand and absorb what the artist is doing. Therefore it should be appropriate to the situation and must communicate to its intended market. A range of posters, comic strips, puppets, games, discussion starters, and other visual aids are included to achieve this. Róhr-Rouendaal introduces a variety of methods and tips for

engaging people and we really benefit from her experience here.

Drawing is used as a device to aid recognition and understanding of complex issues but is susceptible to misinterpretation. The book explains the importance of testing whether it will reach and be understood by the intended audience, when and if it needs to be done, and how to achieve it. When visual aids are used well they can improve visual literacy, which has a lot to do with the interplay between visual and verbal ways of communicating. How we understand this is part of a wider debate may in some ways parallel with our understanding of linguistics.

The book comes with two CD ROMs attached. In many parts of the world we take for granted the technology which enables us to construct, manipulate, and communicate drawings via computers. It includes a section on digital media and how it may be used to manipulate images; but this spreads itself thinly. The emphasis in the main is on traditional methods that can be simply produced without need for specialist equipment.

Where there is no artist includes more than 1,200 drawings that may be used copyright free for education. They illustrate people in their environment and relate to a wide range of educational and health issues. Overall, the book is easy to use, fun, and a real source of inspiration.

**Reviewed by Nick Turner,
Communications Officer, IIED**

■ Available from Practical Action Publishing, Schumacher Centre for Technology and Development, Bourton on Dunsmore, Rugby, Warwickshire, CV23 9QZ, UK. Website: www.developmentbookshop.com



CIFOR, 2006
ISBN: 979-24-4656-7

Guide to participatory tools for forest communities

● Kristen Evans, Wil de Jong, Peter Cronkleton, Douglas Sheil, Tim Lynam, Trikurnianti Kusumanto, Carol J Pierce Colfer

Participatory methods have gained in respect and popularity over the last 10 to 15 years. Along with their use and greater legitimacy there has been considerable development of individual tools and participatory approaches. One of the earliest collections of tools, 'Participatory Learning and Action, A Trainer's Guide' was written by Jules Pretty, Irene Guijt, John Thompson and Ian Scoones in 1995 and published by IIED. There are now numerous tool boxes and handbooks for researchers and practitioners to choose from.

This guide aims to provide new options for people who work with forest dependent communities with the objective of furthering sustainable development. The guide is a product of the research project 'Stakeholders and Biodiversity in the Forest at the Local Level' funded by the Swiss Development Agency and CIFOR.

The Guide is concise and is presented in four parts:

- Concepts: a brief overview of the context in which forest dependent communities live, the importance of community participation, and an introduction to participatory research.
- Guides for selecting a tool: provides a useful overview of the tools. The section ends with a review of additional considerations such as who should participate, who should facilitate, and some ethical considerations.
- Toolbox: this presents ten tools in a standard format – overview, advantages

and limitations, practical considerations, and further information.

Given the substantial literature now available on participatory methods, it is hard to understand what this latest publication from CIFOR contributes. The publication is derived from a research project, but there appears to be no direct link between the project and the toolbox. Many of the examples in the toolbox appear to predate the project or were conducted under other projects. The opportunity to ground-truth, adapt, and develop the tools appears to have been missed or not recorded. The toolbox itself is an odd mixture of tools that most practitioners will recognise (such as pebble scoring) and newcomers such as Bayesian Belief Networks. The framework used means practitioners don't learn much that they didn't already know from old favourites but don't quite get enough to be excited by the new tools (especially with names like Bayesian).

For researchers with access to international scientific literature, the most valuable parts of the guide are the references or resources that are provided in the outline of the tool.

In the Purpose, the authors suggest that their aim is to add more tools to the guide 'as they are developed'. My plea to the authors and CIFOR is that in the next publication, or edition, that they show how the tools have been used and 'ground-truthed'. Practitioners may experiment within the context of their everyday work, but they rarely have the luxury of the time and space to develop and test tools.

**Reviewed by Ivan Bond, Senior
Researcher, Forestry and Land Use
Programme, IIED**

■ Available from Center for International Forestry Research (CIFOR), Bogor, Indonesia. Email: cifor-publications@cgiar.org
Downloadable from: www.cifor.cgiar.org/Publications/Detail?pid=2095

How wide are the ripples? Introducing IKM Emergent

● www.ikmemergent.net

Most studies of participatory work focus either on the work itself or on how it connects to the specific development research or programme to which it is connected. But what role does participatory work have in influencing wider development knowledge and decision-making? What role could it, or should it have? These questions are seldom explored.

Emergent Issues in Information and Knowledge Management (IKM) and International Development (known as IKM Emergent) is a new research programme. It is based on a network of academics and practitioners who share a general concern with how development sector organisations select, handle, and use knowledge in their work.

IKM Emergent is organised through three working groups. One of these groups is the Dialogue, Discourse and Translation working group. It is concerned with illustrating the problems of – and the opportunities for – articulating, receiving, and using knowledge produced in the global South to inform development thought and action. As part of this agenda, it seeks to understand better how the output of participatory processes with local populations is used in the development sector.

Send us your case studies – prizes to be won!

IKM Emergent is offering one prize of €1,000 and up to five of €500 for the most interesting and relevant entries which cover any of the following:

- Examples of the wider use of material produced through development-related participatory processes outside the immediate research or programme context in which they had been conducted. This can be either within development organisations or in the public domain.
- Examples of how messages have been distorted, or of significant failures to use or learn from output produced through such processes.
- Examples of the subsequent use of lessons learnt. For example, within the 'participating community' through engagement in participatory processes or from feedback to the community of the research findings to which such processes had contributed.

Each case study should be between 2000-4000 words long. They may be presented in English, French, Spanish, or Portuguese.

The winners will be selected by editors of the *Participatory Learning and Action (PLA)* series in collaboration with participants in the IKM programme.

The winning case studies will be considered for publication in English in *PLA* and through other channels by IKM Emergent under a creative commons licence.

Wanted – researcher!

The working group is also looking for someone interested in conducting further research and producing an overview of the issue. IKM is looking for a researcher/analyst who would be interested in:

- Conducting a survey of existing literature and grey literature. To what extent is the issue of the wider use of participatory material within development organisations being addressed? And in particular, what is its use within information/knowledge management and learning processes?
- Conducting a survey of a small sample of development organisations. Do they publicise the results of participatory processes internally? How is this done? How is the resulting material stored, described, and retrieved within their information systems?
- Considering the broader lessons of the case studies.
- Producing a paper which would analyse the issues involved, identify and describe good practice, and identify areas of concern or of continuing ignorance. What further actions might IKM, participation communities of practice, or development organisations take part in?

This work would be conducted principally in English. The researcher could be independent or part of an organisation. A grant of €5000 would be paid to support this work. IKM Emergent would wish to publish a version of the final paper, again under a creative commons licence.

■ Please contact: Mike Powell at mike@ikmemergent.net

Events and training

Exposure and Dialogue Programme Association (Bonn/Germany)

The EDP Association has organised Exposure and Dialogue Programmes (EDPs) since 1992. The EDP aims to build strategic alliances for poverty reduction among politicians and other high level decision makers. In cooperation with different partners in Europe and overseas, EDP focuses on the circumstances under which ordinary people make steps out of poverty by their own effort. This is to promote insights into the potential of different forms of genuine self-help – on the background of tools, norms, and regulations that build both local and international capacities.

Facilitated by grass-root organisations, participants visit host families in their homes, live and work with them for at least 3 to 4 days. Exposure experiences are reflected upon in detail and potential follow-up steps are discussed before participants return to their own institutions.

After having conducted 77 programmes in four continents, the Association wishes to improve internal processes of how to monitor impact on EDP participants and cooperation partners. On March 11, 2008, a small group of technical experts will look at potential instruments which help to monitor and 'evaluate' personal change towards being 'pro-poor' and how this might effect structural changes in cooperating institutions. Any technical advice on the topic of impact monitoring of immersion programmes is very welcome.

■ Please contact Jörg Hilgers, Email: hilgers@exposure-dialog.de

Mosaic Workshops

Stakeholder Participation in Planning, Needs Assessment, Monitoring and Evaluation using PRA/PLA Tools

● 7th–12th July 2008
Ottawa, Canada

The Stakeholder Participation workshop focuses on core participatory concepts, tools, and their application. This is an intensive 6-day workshop set in the community to maximise learning, group interaction and networking. Topics include:

- the origins of participatory development;
- learning and application of PRA/PLA tools;
- the application of participation to project design, monitoring and evaluation;
- developing effective facilitation skills;
- building action plans; and
- team building.

Two-day community assignments proposed by community-based organisations in the Ottawa region will allow participants to apply tools learnt in the workshop to real-life situations. This is also a great opportunity to network with other practitioners, NGOs, donors, and action researchers from all over the world.

Results-Based Management, Appreciative Inquiry and Open Space Technology

● 14th–18th July 2008
Ottawa, Canada

This new workshop introduces participants to Results-Based Management, Appreciative Inquiry and Open Space Technology. Demonstrate the effectiveness of your programmes with Results-Based

Management. Master what we mean by results, develop programme or organisational plans that are results-based, and design performance monitoring systems based on indicators and participatory methods. You will also expand your repertoire of tools to also learn about Appreciative Inquiry and Open Space and how they can be applied to your organisation, programme, and/or project. These approaches are increasingly being used around the world to tap into new ways of working that are more results-oriented, more appreciative, and less problem-focused and more self-organised versus top down.

Participatory Monitoring and Evaluation

● 21st–26th July 2008
Ottawa, Canada

Participatory Monitoring and Evaluation (PM&E) involves a different approach to project monitoring and evaluation by involving local people, project stakeholders, and development agencies deciding together about how to measure results and what actions should follow once this information has been collected and analysed. This intensive 6-day experiential workshop is practically focused with daily excursions into the community and a 3-day community assignment. Topics covered at the workshop include:

- Origins of PM&E
- Skills and attributes of a PM&E facilitator
- Learning PM&E tools
- Designing a monitoring and evaluation framework
- Quantitative and qualitative indicators
- Building action plans, and much more.

All workshops organised by Mosaic are sensitive to issues of gender, ethnicity, race, and class and how these can influence outcomes and how we see the world if they are absent from our assumptions, direct participation, our analysis, and conclusions.

If you can't attend the workshops, please contact Mosaic to custom design a workshop to suit the specific needs of your organisation.

■ For further information, please get in touch. Please provide your full mailing address and we will send you a brochure. Email: wkshop05@mosaic-net-intl.ca; Website: www.mosaic-net-intl.ca

IMMERSION OPPORTUNITIES

ActionAid International Immersion Programme

Immersion are regularly organised by ActionAid International through its country programmes and partners in Africa and Asia. Participants in an ActionAid-facilitated immersion spend a minimum of 3 days and nights staying with a family in a village and living, as far as possible, how that family lives. Though also used for internal purposes, the AAI Immersion Programme is open to external development professionals, staff of aid agencies, and governments. An updated schedule is available on the AAI website:

www.actionaid.org/main.aspx?PageID=571

■ For more information, please contact: ActionAid, Hamlyn House, Macdonald Road, London N19 5PG, UK; Tel: +44 20 7561 7653; Email: immersions@actionaid.org

World Bank, Pakistan

Generally, the practice of immersions in the World Bank – known as the Grass Roots Immersion Programme (GRIP) and Village Immersion Programme (VIP) – is not regular. But they are done regularly in some countries like Pakistan as a result of a personal and professional choice. Qazi Azmat Isa, who works as Senior Community Development Specialist in WB Pakistan, runs immersions twice a year in order to monitor and evaluate the Pakistan's Poverty Alleviation Fund (PPAF), which is under his responsibility.

■ If you are interested in sharing this experience and understanding it first-hand, please contact: Qazi Azmat Isa, South Asia Sustainable Development, World Bank Office, Islamabad, Pakistan. Tel: + 92 51 227 9641, ext. 151; Email: qisa@worldbank.org

Exposure and Dialogue Programmes, Self-Employed Women Association (SEWA), India

SEWA has a long and diversified experience in preparing Exposure and Dialogue Programmes (EDPs). SEWA can host people/organisations that are willing to undergo such exposure programme. EDPs can be organised and shaped according to needs (e.g. thematic or open-ended EDP). The number of participants can range from one to 14.

■ To find out more about possible arrangements and costs, please contact: Reema Nanavaty, Director, Economic and Rural Development, Self Employed Women's Association (SEWA), SEWA Reception Centre, Opp. Lokmanya Tilak Baug, Bhadra, Ahmedabad, 380 00, India. Tel: +91 79 26575129, +91 79 26577175; Email: bdmsa@icenet.co.in

Insight Experiential Learning Programme

● Praxis – Institute for Participatory Practices, India

Praxis India firmly believes in the practice of immersions and has therefore institutionalised it as a refresher experience for its staff members. Praxis feels that is equally important to promote immersions among other institutions, such as NGOs, multilateral and bilateral donors, universities, government bodies, and media agencies.

Insight is Praxis's experiential learning programme, and has been developed specifically for external organisations. An *Insight* shall be a spontaneous and genuine learning process in which outsiders and insiders (guests and hosts) can openly come together to share and understand each other's perspectives.

Praxis intentionally avoids proposing fixed schedules. Each *Insight* will be specifically designed in order to match participants' expectations and hosts' availability. An *ad hoc* meeting with participants as well as local families will be pre-arranged to this aim. However, some features will be common: an orientation before the exposure, staying with families for a minimum of 3 to 4 nights, and a conclusive reflection session among guests, hosts and facilitators.

■ To find out more about *Insight*, please contact: Raffaella Catani, Praxis, C-75 South Extension Part II, 110049, New Delhi, India. Tel: +91 11 41642348-52 (Ext. 222); Email: raffaellac@praxisindia.org



e-participation

ActionAid International – Immersions

www.actionaid.org

As part of its main website (www.actionaid.org), ActionAid International has devoted one page to explain its concept of immersions and how these kind of experiences can help make poverty personal. A calendar of forthcoming immersions offered by AAI is available with all necessary contact details. It is also possible to download AAI's report on its pilot immersion held in Ghana in 2005 as well as its latest immersion brochure.

Directions: AAI home page > About us > Immersions

Praxis (under construction)

www.praxisindia.org

Nowadays there is a wide range of documents available on immersions (manuals, handbooks, personal accounts, international workshops' notes, reports etc). However, access to them is generally limited either because they are scattered across different websites or available as hard copies only. Because of this, Praxis is aiming to facilitate better interaction among immersion practitioners and others who are interested in learning more.

Praxis is creating an Immersions website within its existing website (www.praxisindia.org). The website will offer two kinds of services:

- an updated and comprehensive archive of documents related to immersions (possibly organised by topic); and
- an interactive forum for meeting, sharing, discussing, and learning.

The forum is meant to initiate dialogue and reflection on people's diverse immersion experiences. Its aim will be to generate collective

learning and methodological improvements. This space will be open to all people/institutions interested in taking part in this sort of peer-review system. We hope it will contribute to the growth of good practice and potential new applications for immersions.

■ If you or your organisation is interested, or have any queries or suggestions, please contact: Raffaella Catani, Praxis India, Delhi Office, C-75 NDSE Part II, New Delhi 110049, India. Email: raffaellac@praxisindia.org. Tel: +91 11 416 42348 52 (Ext. 222)

Learning for Sustainability

<http://learningforsustainability.net>

Learning for Sustainability has been substantially revised and updated over the past few months. This site focuses on sustainability issues such as natural resource management. It provides an online guide for government agency staff, NGOs, and other community leaders working to support multi-stakeholder learning processes. It examines capacity building for individuals in agencies and communities that directly or indirectly take the lead in initiating and supporting the many social process strands that support a learning society. The site provides links to key information sources on each strand – include networking, dialogue, adaptive management, knowledge management, and evaluation. A short introduction to each section outlines the nature of the resource links provided, and provides pointers to other topic areas which are closely related in use.

Links include guides, manuals, and checklists that address issues such as participation and

engagement. Learning is shared in areas such as the HIV/AIDS sector, public health, and protected natural areas. There are resource listings on underpinning social research methods including systems thinking, interdisciplinarity, and action research. One page lists online resources for both post-graduate research students and their supervisors. Topics include thinking about the supervisory team, as well as tips for structuring and writing a thesis or dissertation.

The LearningForSustainability.net site also manages additional pages on finding volunteering and job opportunities. These are directly accessible from the main site indexing system. These link to other online resources together in one easy to access site.

Open Forum on Participatory Geographic Information Systems and Technologies: PGIS/PPGIS custom search engine

www.ppgis.org

The interface PGIS/PPGIS custom search engine has been improved and is welcoming new participants. The objective is to develop a highly specialised Custom Search Engine reflecting knowledge and interests in PGIS/PPGIS practice and science. Researchers and practitioners are invited to contribute to its development. In addition, you can insert the search interface on your web sites.

The Open Forum on Participatory Geographic Information Systems and Technologies is managed by www.iapad.org and hosted by www.ppgis.net. PGIS, PPGIS and community mapping bibliography is found at <http://ppgis.iapad.org/bibliography.htm>

The Communication Initiative: The Drum Beat, Social Marketing

www.comminit.com

This issue of The Drum Beat explores the concept and practice of social marketing. It includes summaries focusing on aspects of community involvement as it relates to social marketing, and then looks at examples of campaigns addressing issues of HIV/AIDS, nutrition, and physical activity, as well as those focused on young people. Finally, it includes a list of resources for those researching how to implement a social marketing campaign. Articles and resources online include:

- Social marketing: principles and practice;
- Social marketing principles;
- Social marketing and changing behaviour;
- Exchange theory;
- Family tree of theories, methodologies and strategies in development communication: convergences and differences;

- Section on social marketing;
- Social marketing – the 4 Ps; and
- Social marketing – a seven step approach.

Access this issue online at www.comminit.com/drum_beat_391.html

Subscribe to The Drum Beat: www.comminit.com/subscribe_drumbeat.html

A Periodic Table of Visualisation Methods

www.visual-literacy.org/periodic_table/periodic_table.html

Visual Literacy is an e-learning website. It focuses on **visual literacy** – a critical, but often neglected skill for business, communication, and engineering students. Visual literacy is the ability to evaluate, apply, or create conceptual visual representations. The tools aim to assist you to evaluate advantages and disadvantages of visual representations, to improve their shortcomings, to use them to create and communicate knowledge,

or to devise new ways of representing insights.

The Periodic Table is a quick and easy visual reference to visualisation methods. By moving the cursor over the table, pop-up boxes provide a visual example of each method. The methods range from pie charts and Venn diagrams, to evocative knowledge maps, stakeholder maps, affinity diagrams, and more.

Like a Periodic Table, the methods are categorised into different areas of visualisation: information, concept, metaphor, and compound visualisation. These are further subdivided into process and structure visualisation.

Finally, the table notes whether the methods are supplied with either an overview or detail about the method, or both combined, as well as whether the method promotes divergent thinking (creating ideas and responses) or convergent thinking (critical thinking for analysis and synthesis).

RCPLA Network

In this section, we update readers on activities of the **Resource Centres for Participatory Learning and Action Network (RCPLA) Network** (www.rcpla.org) and its members. RCPLA is a diverse, international network of national-level organisations, which brings together development practitioners from around the globe. It was formally established in 1997 to promote the use of participatory approaches to development. The network is dedicated to capturing and disseminating development perspectives from the South. For more information please contact the RCPLA Network Steering Group:

RCPLA Coordination and North Africa & Middle East Region:

Ali Mokhtar, Near East Foundation – Middle East Region, Center for Development Services (CDS), 4 Ahmed Pasha Street, 10th Floor, Garden City, Cairo, Egypt. Tel: +20 2 795 7558; Fax: +20 2 794 7278; Email: cds.prog@neareast.org; amokhtar@nefdev.org; Website: www.neareast.org/main/cds/default.aspx

Asia Region: Tom Thomas, Director, Institute for Participatory Practices (Praxis), S-75 South Extension, Part II, New Delhi, India 110 049. Tel/Fax: +91 11 5164 2348 to 51; Email: tomt@praxisindia.org; www.praxisindia.org
Jayatissa Samaranayake, Institute for Participatory Interaction in Development (IPID), 591 Havelock Road, Colombo 06, Sri Lanka. Tel: +94 1 555521;

News from the RCPLA Network Coordinator

Refining our scope of work

The importance of participation for sustainable development is now widely accepted. Awareness of and commitment to the centrality of participation is increasing. Capacity building training in the skills of grassroots' participation is widespread. And there is a remarkable openness to participation in policy formation and decision-making.

To continue its prominent role within international development, it has been essential for the RCPLA network to consciously broaden its scope and focus on promoting the participatory approach as a tool to help researchers and development practitioners in their work. This has

helped the RCPLA to sustain its existence and increase its membership base. It has also provided the network with the needed ground to address and facilitate discussions around different developmental issues while linking them to participation.

Within this framework, the RCPLA launched its first e-discussion and case study competition on the topic 'Using the Participatory Approach in Climate Change Adaptation'. This topic was chosen as a result of consultation among the network members. Online, members ranked the following issues: Corporate Social Responsibility, Climate Change, Water Resource Management, Equity and Health. These development topics represented the main issues addressed globally as well as the areas of interest to RCPLA members. To find out more about

Tel/Fax: +94 1 587361; Email: ipidc@panlanka.net

West Africa Region: Awa Faly Ba Mbow, IED-Afrique, BP 5579 Dakar Fann, Senegal. Tel: +221 33 867 10 58; Fax: +221 33 867 10 59; Email: awafba@iedafrique.org
Website: www.iedafrique.org

European Region: Jane Stevens, Participation, Power and Social Change Group, Institute of Development Studies (IDS), University of Sussex, Brighton BN1 9RE, UK.

Tel: + 44 1273 678690; Fax: + 44 1273 21202;

Email: participation@ids.ac.uk; Website:

www.ids.ac.uk/ids/particip

Participatory Learning and Action Editorial Team, International Institute for Environment and Development (IIED), 3 Endsleigh Street, London WC1H 0DD, UK. Tel: +44 207 388 2117; Fax: +44 207 388 2826; Email: planotes@iied.org; Website: www.planotes.org

Latin American Region: Jordi Surkin Beneria, CBC Andes, Conservacion Internacional, La Paz, Bolivia. Tel/fax: +591-2-2114528/2114496; Email: jsurkin@conservation.org;

Website: www.conservation.org

Southern and Eastern Africa Region: Eliud Wakwabubi, Participatory Methodologies Forum of Kenya (PAMFORK), Jabavu Road, PCEA Jitegemea Flats, Flat No. D3, PO Box 2645, KNH Post Office, Nairobi, Kenya. Tel/Fax: +254 2 716609; Email: pamfork@nbnnet.co.ke

these activities please visit www.rcpla.org

Another important activity is the RCPLA workshop in Cairo, Egypt 4th–6th March 2008, hosted by the network coordinator. RCPLA members were invited to submit a case study illustrating 'The Power of Participatory Development'. These case studies will be reviewed by a committee of development practitioners for publication. The workshop was also a good opportunity for new and old members to get to know one other, exchange experiences, and work on developing a RCPLA activities plan for 2008 and beyond. We will report back further in the next issue of *PLA*.

New members

Over the last few months, many organisations have shown interest in

joining RCPLA. We have the pleasure to welcome on board the following new members:

Knowledge Transfer Africa (KTA)
KTA operates in Zimbabwe, Malawi, Botswana, Zambia, South Africa, and Mozambique. It works to promote development through information dissemination and enhancing the skills of farmers and marginalised groups to enable communities to solve their problems through participatory development.

Jesuit Migrant Service Mexico (SJM-MEX)
SJM-MEX was established to achieve total respect of migrants' families and improve their living conditions in Mexico and surrounding countries. SJM-MEX is member and coordinator of the SJM/CA&NA network (SJM/CA&NA operates in nine countries and it is made up of fourteen Jesuits Company Provinces including universities, social projects, human rights advocacy centres, and special studies centres). It is also a member of the SJM/PROMEX network and the SJMLA network.

University of Ulster, Sociology Department
Located in Ireland, the University of Ulster's Sociology Department operates to provide learning opportunities for youth. It also offers them the opportunity to carry out research in different fields – economic, social, and cultural. The department aims to develop the understanding of participatory approaches in order to strengthen the work carried out for socially excluded communities who are undergoing transition and seeking justice and social change with regards to the legacy of the political conflict in

Northern Ireland.

Grace Church in Zambia
The Grace Church in Zambia is a faith-based organisation. It was established in 1999 to promote sustainable development. It focuses mainly on enhancing community members' skills to manage their resources and providing them with the much needed information to protect themselves from the pandemic HIV/AIDS.

The Leadership and Management Development Centre (LMDC)
LMDC is an Egyptian national entity affiliated to the Ministry of Investment. It supports the Ministry in achieving the government's mandate to implement reform programmes aimed at improving investments in all different sectors. Since 1989, the LMDC has been geared towards human resources development activities. It aims to enhance the management and efficient utilisation of business resources, while ensuring the degrees of accountability, transparency, quality, and timeliness in delivery of technical assistance required by different local and regional agencies and the recipients of assistance funds.

Ogoni Youths Interaction Network (OYIN)
OYIN is a youth-based community relations and peace initiative. OYIN has operated since 2001 in the Niger Delta Region. It was established to advocate for peace and sustainable development through informing young people with the aim of creating a community of local people that know their rights, needs, and how to achieve them.

To join the RCPLA network please contact Ms. Passinte Isaak Email: pisaak@nefdev.org

News from the Asian Regional Coordinator

Insight – a Praxis Experiential Learning Programme

In the last year and half, Praxis has been working on developing the concept and practice of immersions. This has led to two institutional commitments: to adopt it internally as well as promote it amongst other organisations. By adopting immersions as a regular, internal practice Praxis wants to further energise its activism and also update its knowledge and understanding of peoples' reality, something which is easy to miss while wearing a professional's hat.

Praxis feels that it is equally important to promote immersions amongst other institutions, such as NGOs, multilateral and bilateral donors, universities, government bodies, and media agencies. *Insight*, which is a Praxis Experiential Learning Programme, has been conceived and developed for such organisations.

More details on the core of the immersions experience, its varied forms of application and the Praxis *Insight* Programme are in this special edition of PLA, which Praxis has co-edited with IIED and Izzy Birch.

TheWorkshop07: the 11th International Commune on Participatory Development

As an organisation committed to the promotion of participatory development, Praxis engages in various activities. The international workshop is a flagship event. It provides a forum for development workers across the world to update themselves about the new trends in the field of participatory development.

The Workshop07 was the 11th consecutive workshop held by Praxis. More than 75 participants from across 18 countries gathered in Hyderabad, India, to participate in this 11 day workshop. The specifics of the 12th workshop will be announced in May 2008. Please visit www.praxisindia.org for details.

Praxis – UK

Praxis UK (www.praxis-uk.org) is an organisation affiliated to Praxis India with partners, supporters, and staff of many nationalities. It is part of a global movement that encourages ordinary and often marginalised people to exercise their right to participate in their own development. The primary focus is to facilitate the use of participatory practices in human development. Praxis uses every opportunity to promote participation in development, from training in the use of participatory tools, people-centred research, intensive documentation, to proactive initiatives.

Praxis UK seeks to be active in international development by continuing Praxis India's work over the last decade. This is mainly through research, advocacy, programme support, and capacity building initiatives in partnership with NGOs, governments, and donors. The aim is to articulate Praxis UK's vision and draw upon Praxis India's relevant experiences and contextualise it in contemporary policy debates and discussions on global social development. While the offices in India focus on expanding longer-term engagement in the Asia region, the UK office will be focused on representing Praxis in the UK, expanding its remit to Africa, the Middle East, Latin America, and other

transition countries.

For more information contact the Programme Officer, Sowmyaa Bharadwaj. Email: sowmyaab@praxis-uk.org

News from the Institute of Development Studies (IDS)

It has been an exciting time for the Participation, Power, and Social Change Team, with a major international workshop and the launch of two new publications at the Development Studies Association's (DSA) annual conference.

We were part of a team running the international **Champions of Participation** workshop in Sussex, UK. This brought together participants from countries worldwide to meet with UK local government staff, citizen representatives, and elected officials. During the workshop they shared their experiences of championing participation in local governance in diverse circumstances, as well as visiting local UK authorities to see examples of participation in action. A short report will soon be available. For more information on the event, please email: ppsc@ids.ac.uk.

Continuing to develop its work on violence and participation, researchers from the Citizenship, Participation, and Development Research Centre met in Jamaica for a **Building Citizenship Where There is Violence Workshop**. Participants are all using participatory research methods to work on issues of citizenship in violent contexts in their own countries. PPSC member Joy Moncrieffe took the group to visit primary schools she is working with, where they had a chance to talk to the children, many of whom had

experienced various forms of violence. For more information on this work visit the DRC website: www.drc-citizenship.org

The Development Studies Association's annual conference was held at IDS during September. The team launched two new books at this conference. ***Springs of Participation***, edited by Karen Brock and Jethro Pettit, explores the creation and evolution of **participatory methodologies**. It brings together the experience and reflections of a group of experienced practitioners working in diverse situations and countries. It aims to show how academics and practitioners can learn to develop effective and sustainable new working methods. Please see the In Touch section in this issue of *PLA* for a fuller review. In addition, we also launched ***The Power of Labelling***, edited by Joy Moncrieffe and Rosalind Eyben. This book looks at how labels, such as 'the poor', are created and used and how these labels shape power relations in development and aid work. For more information about how to get copies of these books email: bookshop@ids.ac.uk

The **Participation Resource Centre** continues to provide an information and document delivery service to Southern countries and organisations. Here you will be able to find full details of a range of practical and analytical materials relating to **participatory approaches to development, citizenship, rights, governance, and the environment**. The entire collection can be searched online through our website: www.pnet.ids.ac.uk/prc. Or for further information email: ppsc@ids.ac.uk.

News from IIED

Welcome to our new Editorial Board member!

As mentioned in the Editorial, the *PLA* team is delighted to welcome Peter Taylor from IDS onto our Strategic Editorial Board.

Linking Poverty Reduction and Biodiversity Conservation

The Poverty and Conservation Learning Group (PCLG) is an initiative coordinated by IIED, which aims to facilitate learning on conservation-poverty linkages between and within different communities of interest.

For more info visit:

www.povertyandconservation.info

The PCLG is seeking inputs to a

discussion on tools and methodologies for assessing the social impacts of protected areas. Please visit the site, read the discussion document and give your feedback! www.dgroups.org/groups/oneworld/pclg

The PCLG Directory of Poverty and Conservation Organisations and Initiatives 2007 is now available at: www.povertyandconservation.info/docs/20071201-PCLG_Directory.pdf

BioSoc – the Biodiversity and Society bulletin – is an output of the PCLG. **BioSoc** highlights key new research on biodiversity and society, poverty, and conservation and is available in English, Spanish, and French. To subscribe to BioSoc and to IIED's monthly new publications e-bulletin and bi-monthly e-bulletin

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- **Articles:** max. 2500 words plus illustrations – see below for guidelines.
- **Feedback:** letters to the editor, or longer pieces (max. 1500 words) which respond in more detail to articles.
- **Tips for trainers:** training exercises, tips on running workshops, reflections on behaviour and attitudes in training, etc., max. 1000 words.
- **In Touch:** short pieces on forthcoming workshops and events, publications, and online resources.

We welcome accounts of recent experiences in the field (or in workshops) and current thinking around participation, and particularly encourage contributions from practitioners in the South. Articles should be co-authored by all those engaged in the research, project, or programme.

In an era in which participatory approaches have often been viewed as a panacea to development problems or where acquiring funds for projects has depended on the use of such methodologies, it is vital to pay attention to the quality of the methods and process of participation. Whilst we will continue to publish experiences of innovation in the field, we would like to emphasise the need to analyse the limitations as well as the successes of participation. *Participatory Learning and Action* is still a series whose focus is methodological, but it is important to give more importance to issues of power in the process and to the impact of participation, asking ourselves who sets the agenda for participatory practice. It is only with critical analysis that we can further develop our thinking around participatory learning and action.

We particularly favour articles which contain one or more of the following elements:

- an **innovative** angle to the concepts of participatory approaches or their application;
- **critical reflections** on the lessons learnt from the author's experiences;
- an attempt to develop **new methods**, or innovative adaptations of existing ones;
- consideration of **the processes**

- involved in participatory approaches;
- an assessment of the **impacts** of a participatory process;
- potentials and limitations of **scaling up and institutionalising participatory approaches**; and,
- potentials and limitations of **participatory policy-making processes**.

Language and style

Please try to keep contributions clear and accessible. Sentences should be short and simple. Avoid jargon, theoretical terminology, and overly academic language. Explain any specialist terms that you do use and spell out acronyms in full.

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Please include a brief abstract with your article (circa. 150-200 words).

References

If references are mentioned, please include details. *Participatory Learning and Action* is intended to be informal, rather than academic, so references should be kept to a minimum.

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Format

We accept handwritten articles but please write legibly. Typed articles should be double-spaced. Please keep formatting as simple as possible. Avoid embedded codes (e.g. footnotes/endnotes, page justification, page numbering).

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Contributions can be sent on paper or by email to: **The Editors, *Participatory Learning and Action***, IIED, 3 Endsleigh Street, London WC1 0DD, UK.
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Resource Centres for Participatory Learning and Action (RCPLA) Network

Since June 2002, the IIED Resource Centre for Participatory Learning and Action has

now housed by the Institute of Development Studies, UK. Practical information and support on participation in development is also available from the various members of the RCPLA Network.

This initiative is a global network of resource centres for participatory learning and action, which brings together 15 organisations from Africa, Asia, South America, and Europe. The RCPLA Network is committed to information sharing and networking on participatory approaches.

Each member is itself at the centre of a regional or national network. Members share information about activities in their respective countries, such as training programmes, workshops and key events, as well as providing PLA information focused on the particular fields in which they operate.

More information, including regular updates on RCPLA activities, can be found in the In Touch section of *Participatory Learning and Action*, or by visiting www.rcpla.org, or contacting the network coordinator: Ali Mokhtar, CDS, Near East Foundation, 4 Ahmed Pasha Street, 10th Floor, Garden City, Cairo, Egypt. Tel: +20 2 795 7558; Fax: +2 2 794 7278; Email: amokhtar@nefdev.org

Participation at IDS

Participatory approaches and methodologies are also a focus for the Participation, Power and Social Change Group at the Institute of Development Studies, University of Sussex, UK. This group of researchers and practitioners is involved in sharing knowledge, in strengthening capacity to support quality participatory approaches, and in deepening understanding of participatory methods, principles, and ethics. It focuses on South-South sharing, exchange visits, information exchange, action research projects, writing, and training. Services include a Participation Resource Centre (open weekdays) with an online database detailing materials held. The Group also produces a newsletter and operates an email distribution list.

For further information please contact: Jane Stevens, IDS, University of Sussex, Brighton BN1 9RE, UK.
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ISBN: 978-1-84369-689-6
ISSN: 1357-938X
Order no: 14558IIED

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