

### How to build our action research as a real learning process?

By Almir Pereira Junior

*Who owns the Participatory Monitoring and Evaluation (PM&E) process?*

This is an enormous question with no simple answer, especially when we are talking about processes that involve social actors affected by unequal power distribution. We must also be aware that when the PM&E process becomes an obligation, in which economic and cultural dependency is reinforced, the learning dimension is totally undermined.

This issue of ownership was at the core of two recent international events, a BOND workshop on "*Learning from South-North Partnership*" in London, and an INTRAC conference "*Measurement, Management and Accountability?*" in the Netherlands, in which I had the opportunity to participate. The main findings of the two events were similar - the need to build partnerships in which all parties have equal ownership of the PM&E process, and the need to recognize

that the attitudes and values of those involved in the process are more important than tools or methods. The real challenge is how to translate these ideas into action. When we compare these findings with our own experiences of PM&E, especially when we are involved in North – South partnerships, there are marked gaps between theory and practice.

The two main axes on which power inequality rests are the control over economic resources (the "donor" writes the rules for the game) and the control over knowledge (the idea that only "experts" are able to understand the jargon and tools of PM&E). Both of these conditions work to enforce a top (north)-down (south) relationship.

The action research we are undertaking addresses the questions of the control of finance and knowledge by experimenting with a more open and democratic approach to the partnerships between ActionAid and the local organizations which are developing the project with us. First of all, we need to promote a common sense of ownership of the whole process. Second, it will be vital that the ActionAid research teams avoid the trap of acting as "experts", but rather, assume the role of facilitator of an empowering and learning process in which the local organizations feel confident and able to take the lead role in the monitoring of their own advocacy work.

### News from UNAS, Brazil on their advocacy work around Housing Rights

As the first stage of the research UNAS (Union of Heliópolis' Residents' Associations and Centres) is writing an ongoing history of its struggle for housing rights.

Meanwhile, the Heliópolis community continues to put into practice its advocacy strategies. During February and March, around 700 people from the *Heliópolis Homeless Movement* occupied a piece of land owned by the municipal government. The main goals of this political action were to make their fight visible through the media, and to put pressure on local authorities to start to negotiate with the movement. They achieved both results.

### Ghana Project On Course

By Vincent Azumah

Christians believe that the greatest and earliest action research and learning was perhaps done by God himself, but even those who have recorded his work in the Bible fail to learn from what the good old man did.

God did not use any log frame but learned as he worked and was able to create a beautiful world. It was for this reason and many others that ActionAid Ghana and its partners are keen on finding more participatory and innovative means of learning from influencing and policy advocacy work, which the Action Research project seeks to achieve.

To move the project into top gear, the two partners in Ghana, Centre for the Development of People (CEDEP) and the Centre for Sustainable Development Initiatives (CENSUDI) have held separate clarity workshops to ensure a common understanding of the project, associated terminologies

and to identify programmes to form the initial focus of the research. These workshops were necessary because of the different levels, geographical contexts and issues that the three organisations have worked at in Ghana. **Cont...**



**Ghana project cont...**

The workshops were conducted in January and were facilitated by Esther Ofei-Aboagye a development consultant, assisted by the Programme Officer in Ghana, Vincent Azumah. To encourage learning and sharing in the African region, the Ugandan Programme Officer Ms. Sarah Okwaare Otto participated in the CEDEP workshop.

The two workshops produced the following:

- organisational definitions and understanding of advocacy; discussion of traditional methods of advocacy; and the interpretation of advocacy within their organisational mission statements and strategies
- "glossaries" of words related to advocacy and impact assessment.

- a proposed agenda of activities for the way forward for the research.
- discussion and prioritisation of possible organisational programmes and projects to form the focus of the action research.

Even before we shift the project into cruising mode, like God did in the Bible, we have already seen an addition we have to make with CENSUDI to ensure success.

*"Traditionally we have used satire and folklore to effect change. This includes events at festivals such as Golgo to publicly ridicule people who have done traditionally unacceptable things through songs and mockery"*

**CENSUDI 'Together' Group**

An additional hand has been hired to strengthen the CENSUDI end of the project, we wish to welcome Florence Manamzor to the research team.

For a detailed draft report contact Jennifer Chapman or Vincent Azumah.

**Some definition of advocacy devised by participants in the CENSUDI clarity workshop:**

- Ø Advocacy is about issues (Rape, Beating, Respect for Women, Child Abuse). The Lesson here is to get the issues clear. What is the bottom line? What do we want to change?
- Ø Advocacy is also about process – for instance:
  - § *Cry for yourself* (target group involvement and appropriate capacity building)
  - § *Unity is strength* (collaboration and partnership is important for advocacy)
  - § All the street have persuasive names (use all the means at your disposal).

**Developing Monitoring and Evaluation Tools Together with Partners in Nepal**

**By Laya Prasad Uprety**

In March 2003 the research team at ActionAid Nepal organised a five-day capacity building workshop with the members of the three partner NGOs' research committees (Community Self Reliance centre, Dalit NGO Federation, and Saraswoti Community Development Forum). The three main objectives of the workshop were:

- (i) to develop a common understanding on the concepts, objectives, rationale and methods of the action research
- (ii) to develop the participatory monitoring and evaluation capacity of the partner organizations
- (iii) to help develop confidence amongst the participants to learn from their actions and experiences.

Partners were encouraged to share their experiences on their existing monitoring and evaluation practices.

Existing processes include holding institutional and community meetings and conducting group discussions. Most of the systems are driven by the need to report to donors but it was generally accepted that monitoring and evaluation needs to be an integral part of advocacy campaigns or programmes.

Group work was carried out into *the use of case studies* and *developing indicators* for monitoring and evaluation purposes.

**Case Studies**

Many of the partners already have extensive experience in the collection and analysis of case studies, they are particularly used to provide evidence to support conclusions and in reporting. During the workshop, the participants explored the potential of case studies as a powerful monitoring and evaluation tool. Through the analysis of relevant examples it became clear that the existing case studies of social units or families, if repeated over time, could provide a perspective on

The group work also discussed the possibility for indicators to reflect and track the journey from the *process* of the project or campaign (for example regular meetings or training events) through the *effect* of these interventions and to the *impacts* the work has on the wider society. The facilitating team helped the partners use their own wealth of experience to

begin to develop their own indicators.

Following the workshop the partner NGOs will be further developing and experimenting with the tools that were

explored in the context of their own advocacy work.

One very important outcome of the workshop, realized by all participants, was the confirmation that each individual has an important part to play in making monitoring and evaluation an integral part of rights-based advocacy campaigns and in developing relevant monitoring and evaluation tools and techniques.

**...each individual has an important part to play in making monitoring and evaluation an integral part of rights-based advocacy campaigns.**

**Action Learning in our own Practice**

By Jennifer Chapman

*I came away feeling inspired and energised by the whole week. I am convinced that an action learning approach can facilitate transformation and better development practice.*

Antonella

Vincent (Ghana), Sarah (Uganda), Him (Nepal), Antonella (UK) and myself were fortunate in being able to attend a 5-day workshop on Planning, Monitoring and Evaluation being run by CDRA in South Africa. The event provided an incredibly rich environment for facilitated reflection and discussion with others on our own experience. This article is a very personal attempt to capture a few of the key issues and discussions particularly relevant to the advocacy action research.

The aim of the course was to increase the knowledge and **confidence** of participants to develop and implement planning, monitoring and evaluation processes appropriate to their own developmental practice. This emphasis on confidence sparked interesting discussions about how sometimes we confuse our own or others lack of confidence with lack of capacity – a trend that is often reinforced by the jargon so prevalent in the development sphere. In our subsequent team-meeting a couple of us confessed that despite all our talk and emphasis on action learning, we had still gone to the course hoping to gain knowledge of some valuable technique known only to the ‘professionals’. In other words we expected not to be told (we are all very participatory and respectful of people’s experiences) but led or facilitated towards understanding the answers, the correct way to do things.

This led to reflection on what we are really trying to achieve in our own work. Our project proposal talks about developing innovative tools and

participatory methodologies for assessing the impact of advocacy, yet is there a danger that this early emphasis on tools reinforces the very expectation that somewhere over the horizon there is the correct answer to all our problems? A one size fits all approach that can be refined and delivered by the experts in a neat package of training that will make advocacy work so much more effective. Indeed one country team worries about whether they will be criticized for not being innovative

pertinent to our work: Why do we have a tendency to work on the detail before we have a good sense of the bigger picture? (that preoccupation with easily transferable tools again?); How do we achieve a balance of the inner forces of the material we are working with, with the outer ones of the intervention?; How can we communicate and express ourselves in ways other than words?

This last question links with reflections I have been having around the **culture**

*“Learning is through experience. It happens when we move from thinking about what happened to what tends to happen. It gives us the opportunity to apply what we have learnt from our experience to many new situations. Perhaps putting learning at the core of the organization is one of the most important elements of development practice.” Sarah*

enough if they use any existing tools in their work. But are we doing action research if we don’t build on what is already there?

Built into the workshop were three sessions devoted to the **creative process**, in this case clay work. Apart from looking forward to this immensely – it seemed a wonderful way to deal with the post lunch sink in energy – I could initially sense among all the ActionAid participants a slight discomfort and scepticism with this approach. How could we really justify spending donors money on sending people to South Africa to muck about with clay? Where are the outputs and outcomes from that? Well, apart from a few pots, and a human figure that I have to admit I was rather proud of, what is there to show for those 4 ½ hours of ‘using the right side of the brain’? Writing now a few weeks on from the end of the course, I can personally say that the discussions and reflections we had around the clay work are some of the ones that have really haunted me and that I keep coming back to. First, our common scepticism demonstrated how steeped we all are in the rational approach to development, even when we try to break away from it. And then the questions we asked in relation to the clay, but that are also extremely

of organisations and the use of **images** to aid discussion and understanding. We did experiment briefly with the use of pictures to deepen debate on a particular case study, and also discussed the value of images in uncovering the culture of an organisation. We also discussed how often a situation or organisation being ‘stuck’ can be the impetus to change. I think our research can gain from learning from approaches to **organisational development**. We are working with partners to support them in becoming more reflective in their approaches to advocacy work – this can be viewed as an organisational development process. If so should we not be paying more attention to the stage of development the particular partner organisation is currently at?

This article has deliberately emphasized **questions** rather than answers. Another key issue I reflected on during the workshop was the use of questions and who they are directed to. The facilitators constantly guided us to reflect on what our questions were. But they didn’t try to answer them for us, instead we were invited to discuss them, to swap them, to refine them. To perhaps try to answer them, but sometimes instead to ask better questions. Overall that is what for me this week did – it helped me to ask better questions.

The CDRA website at <http://www.cdra.org.za/> is strongly recommended for stimulating articles and information on their courses.

*“If you think you are a good development practitioner, sit back for a moment and try to answer why you think you are developing people, how you are doing that, who you think you are answerable to in your development work, how and why you do planning monitoring and evaluation. If you can’t find any good answers, take a week’s trip to*

**Uganda – work with paralegals**

By Sarah Okwaare Otto

In Uganda, the ground has been prepared for work with the community. This took place in the in an Orientation workshop organized by ActionAid Uganda and the Ugandan Land Alliance at the Kapchorwa Land Rights Centre in Eastern Uganda in January.

The workshop was attended by paralegals and other stakeholders working directly with the community at grassroots level. Paralegals are the direct links to the community for the land rights centers. Their role is to explain in the law to community members and to mediate in disputes.

The workshop provided the opportunity to discuss the Advocacy Action Research and also explored the

paralegals current work and potential entry points for better understanding of their impact. Five areas of work were decided upon for the initial phase of the action research at the Land Rights Center. The work will start with a group of 12 paralegals who will be involved in reflection on their own and others work.

<b>Areas of work &amp; activity for the first stage of the research with the Uganda Land Alliance</b>	
<p><b>1. Community view of paralegal work</b>  <i>Pilot peer reviews to be undertaken in 3 communities by paralegals from other communities supported by ULA or AAU.</i></p> <p><b>Aims</b></p> <ul style="list-style-type: none"> <li>To understand how the community see the paralegals: their role, skills and quality of work</li> <li>To gather baseline data on recognition of role of paralegals by members of community</li> <li>To enhance paralegals ability to reflect on and assess their own work</li> <li>To gain insights into longevity of settlements reached by paralegals</li> <li>To understand how paralegal work fits in with traditional community conflict resolution mechanisms</li> <li>To develop monitoring indicators with the community</li> </ul>	
<p><b>2. Recognition of role/clarity of role of paralegals by various stakeholders including policy makers &amp; community</b>  <i>Team from ULA/AAU and paralegals to visit pilot communities to talk with police, policy makers and other stakeholders.</i></p> <p><b>Aims</b></p> <ul style="list-style-type: none"> <li>To gather baseline data on how various stakeholders view the role of the paralegals and how they should work together</li> <li>To enhance mutual understanding of the role of paralegals and how they might work with other stakeholders.</li> </ul>	
<p><b>3. Monitoring and analysis of trends</b>  <i>Standard information to be collected on all new cases from April across all Land Rights Centres in Uganda. Emerging trends to be discussed quarterly.</i></p> <p><b>Aims</b></p> <p><b>To enable analysis of trends in:</b></p> <ul style="list-style-type: none"> <li>types of complaints, social characteristics of complainants, agreements reached by mediation, casework handled by different paralegals.</li> </ul> <p><b>Leading to understanding of, and potential action on:</b></p> <ul style="list-style-type: none"> <li>possible gaps in law</li> <li>possible gaps in paralegal skills, training, support and selection</li> <li>what makes paralegals effective</li> </ul>	
<p><b>4. Monitoring and reflection on systems within ULA for micro-macro linkages</b></p> <ul style="list-style-type: none"> <li><i>Casestudy of the Benet issue, which was a crucial advocacy experience that was raised at the grassroots level, then moved to the national level.</i></li> <li><i>12 Paralegals to help facilitate national level workshop for ULA members on the advocacy action research</i></li> </ul> <p><b>Aims</b></p> <ul style="list-style-type: none"> <li>To learn more about how advocacy work at the community, regional and national level does, can and should link together.</li> <li>To reflect on how the links between work at different levels can be made more effective.</li> <li>National level members of the ULA to be better informed of the realities of paralegals work.</li> </ul>	
<p><b>5. Monitoring of paralegal skills: technical, and soft</b>  <i>To facilitate pilot action learning group with 12 paralegals to enable them to reflect on their own skills and skill gaps. Action learning group to also draw on all above activities.</i></p> <p><b>Aims</b></p> <ul style="list-style-type: none"> <li>To enhance paralegals own understanding of their work, the skills required and their own strengths and weaknesses</li> <li>For this to feed into ULA's training, retraining, support and selection of paralegals.</li> </ul>	

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