

# Action research: a necessity in Peace Work

Edited by Christiane Kayser and Flaubert Djateng



## Building Peace

Civil Peace Service (CPS) / BfdW –  
Mano River Region, Great Lakes of Africa  
and Cameroon



# Building Peace

**Brot für die Welt – Evangelischer Entwicklungsdienst (BfdW)**

Bread for the World – Protestant Development Service

**Financed by the BMZ** (Bundesministerium

für Wirtschaftliche Zusammenarbeit – German Federal  
Ministry for Economic Cooperation and Development)

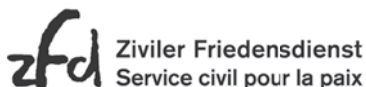
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# Introduction

Action research is becoming an essential component of the peace work carried out by the Civil Peace Service (CPS) networks. We have therefore endeavoured here to share a certain number of action research initiatives in Cameroon, a summary of the various instances of work in progress in DRC, and the initial situation and research questions posed in Sierra Leone at the height of the Ebola epidemic.

We have added selected elements of theory and practice, for there is no one action research approach that is “right”. The constraint of rigorous methodology and the involvement of the stakeholders by using tools that facilitate enhanced communication make it possible to take the actual experiences of the people concerned into consideration. There are currently a considerable number of initiatives and methodologies developed in Latin America, Asia, Europe and Africa that we may appropriate. We have also tried to clarify from our point of view the link between action research and peace work.

We trust that these articles will be useful to you in your various fields of intervention and we are looking forward to receiving descriptions of your experiences and of the tools you are going to develop.

We hope you enjoy reading and working with these materials.

*Flaubert Djateng, Christiane Kayser  
January 2015*

# Action research – an essential tool in the work for social change and sustainable peace

By *Christiane Kayser\**

For many years now we have been placing much emphasis on the analysis of the context shared by the people and groups concerned as the basis for the work in favour of peace and social change of the Civil Peace Service (CPS).<sup>1</sup> We start from the principle that it is necessary to be able to analyse what is going on around us with simple tools to avoid being crushed by difficult situations and heavy factors, to stop being a victim of a situation and become an actor of one's fate. A panorama of the essential actors with their complementarities and conflicts of interest also turns out to be useful. And then we try to place ourselves as networks, organisations, individuals, with our potential, in this panorama.

The fact remains that in many weakened areas preconceptions and rumours still poison the atmosphere between people and groups. In the workshops everyone converges around the same values and goals that are often technical. But in day to day life the picture is different. The deep social fractures in countries like DR Congo, Cameroon, Liberia, Mali and others remain a fundamental obstacle to any kind of constructive change. The global world is constantly evolving and pulls us into changes that are neither desired nor controlled, but we fall back into our entrenched enemy camps we believe are secure.

What can be done?

With the support of the wise Michel Séguier, our “elder brother” who unfortunately passed away in November 2014, we developed the

<sup>1</sup> See *inter alia*: Mapinduzi Journal 1 and the publications in the “Building Peace series”, [www.peaceworkafrica.net](http://www.peaceworkafrica.net)

\* CPS/BfdW Africa support group



notion of “constructive rebellion”, in DRC in Pole Institute’s “Bustani ya Mabadiliko” (Garden of Change), as opposed to the destructive rebellions that stir the global world in crises, in particular in Africa.

We have also developed the beginnings of participatory action research that can be used in concrete situations.<sup>2</sup>

In our work in the Civil Peace Service in Africa we have noticed over the past few years a necessity to go beyond an analysis of the context and carry out modest research actions on concrete conflicts and situations.

A partner organisation in DRC researched the image of men in the country in relation to the spate of rapes that took place.<sup>3</sup>

The Justice and Peace Commission in Douala has been using an action research approach since 2012.<sup>4</sup>

In western Cameroon several partner organisations—along with CPS peace workers—have been focusing since the end of 2013 on the conflict between Bamoun and Bamiléké communities on the left bank of the river Noun<sup>5</sup>.

In 2014 several Cameroon civil society organisations began to work together on action research around what it is that attracts young people in Cameroon, Nigeria and other countries to violent groups like Boko Haram. Questions that could have their importance all over the world if we take into account the rise in violence in most places, including the recent shameful, barbaric attacks in Paris.

In participatory forum theatre work, action research constitutes a part of the effort to be deployed and through which we surpass the emotional in which this form of theatre is anchored.<sup>6</sup>

2 See *inter alia* “Des révoltes constructrices pour le Congo. Expériences des accompagnateurs des dynamiques de paix dans des contextes de crises”, 2013, and “BUSTANI YA MABADILIKO. A garden of change in Eastern DR Congo”, 2007, download from [www.pole-institute.org](http://www.pole-institute.org)

3 See “*Before the war, I was a man*” by Desiree Lwambo, in *Building Peace: The Gender approach: peace work and the struggle against discrimination*, 2012, [www.peaceworkafrica.net](http://www.peaceworkafrica.net)

4 See article in this publication.

5 Study carried out by AJPCedes, Foumban, Cameroon, with the support of Zenu Network (Francis Emmanuel Njifenji, Greta Lenz, Flaubert Djateng). See article in this publication.

6 See also: *Theatre for Peace, Manual*, 2014, [www.peaceworkafrica.net](http://www.peaceworkafrica.net)

In order to move beyond the emotional and reach a healthy detachment from the events that affect us often very closely, surveys and participatory action research turn out to be very useful. We succeed in putting things into perspective and building together strategies for change. We are aware that this may seem complex to the people on the ground. The word “research” creates an insurmountable obstacle like a mountain we are afraid we won’t be able to climb. But the examples mentioned above prove that there is no magic involved and that the process itself makes it possible to surmount rumours and hatred. It is not easy to capitalise on and share these experiences and we are still experimenting with this.

Action research is not a scientific discipline locked away in an ivory tower. It is not objective in that it combines a number of subjectivities and points of view and crosses and compares them to try to identify the facts in relation to the points of view and the stances taken. There is no room for rumours, but the stories, histories, perspectives and analyses of individuals are visibly included. Well conducted, it is also always related to awareness raising in those who conduct it and in those it affects in one way or another. It therefore necessarily evolves and requires a fresh angle regularly.

There is no one method or one single definition valid for action research. There are a certain number of approaches that complete and sometimes contradict each other. Each one of us must choose what is best suited to their situation and possibilities.

Action research above all requires that we go beyond the developmentalist mould, the role of “expert”, that we forget our certainties, “targets”, messages to be delivered to the population, objectives and indicators. We have to place ourselves in research mode. Accept doubt, agree to listen and to learn.

This is a small step towards constructive alliances for change that is at least influenced if not controlled by us. A small step therefore to be taken regularly towards long term peace....

## Douala: Cameroon's metropolis and mirror of the country

Action research as a foundation for the daily work of Justice and Peace but also as an opportunity to boost an institution undergoing transformation

*By P William Tcheumtchoua Nzali junior, s.j.,\*  
and Dr Maurizio Guerrazzi\*\**

*Justice and Peace* is called upon to promote social change in the world to achieve the integral<sup>1</sup> development of the person. This is because social life can create contexts that are not favourable to the personal development of everyone: divergent interests can often make the stakeholders lose a vision of long term community development, without agreeing on the important subjects (or even the environment, infrastructure, etc.). Negotiating the living space of people can lead to errors, which are not too serious if they are noticed and corrected as soon as possible. When left to act freely, such errors in negotiating living space can become quite monstrous as they manage the life of the population negatively over a long period of time.

To counteract this, in 2012 the coordination team of *Justice and Peace* of the diocese of Douala launched a new work strategy, based on action research, which was also in line with the wishes of the President of the commission, the archbishop of Douala, to regularly receive reliable data on the social, economic and political conditions of the population of his

<sup>1</sup> Integral development: development of the whole person with their various component parts including spirituality, relationships, socialisation, occupation and family.

\* Diocesan Coordinator *Justice and Peace Commission*, Douala, Cameroon

\*\* Integrated peace worker/*Justice and Peace Commission*, Douala, Cameroon

diocese. Action research succeeded in satisfying the players on several levels, in relation to individual expectations.

It is also important to observe that the development of urbanisation in Cameroon is inevitably accompanied by an exacerbation of the socio-economic cleavages between different population groups. *Justice and Peace* finds itself facing a reality that has become multi-dimensional, where the ties that bind in traditional society are undergoing change in the habits of the population. The full scope of this change is not being perceived and creates a malaise, which is also often ill-expressed (lack of awareness of a new order of shared civil life) and poorly interpreted: the population is still living intensely in the traditional social links in their hearts but no longer find them in their daily reality. The social and psychological stress generated by this relational change, as well as by cultural changes (in the village, related to village life and the land, compared to the city, related to urban life and work) should be measured, quantified and also require increased awareness on the part of the population itself.

Thus, *Justice and Peace's* approaches to action research have drawn their techniques from the investigative methods of the social sciences and from adult education practises as developed in certain fields of popular education (adult education or andragogy which aims at a common reflection rather than simply making knowledge available) and skills improvement for supervisors. And so the coordinators initiated discussions within *Justice and Peace* on topical subjects, passed round questionnaires through all sections of the population, adopted open question techniques, etc. A major debate on awareness raising was opened up within *Justice and Peace* in the diocese of Douala!

To do this, *Justice and Peace* took into consideration a clinical approach in social science, that is to say an intervention method which gives preference to the constructions of meaning *in situ*, that is to say in context, taking into consideration the subjectivity and skills of the actor concerned and the dynamics at work, whether they be symbolic, imaginary or other..., specific to the situation encountered. The use of open

questions that are not pre-fabricated (as in marketing) was developed and explained.

Moreover, an approach to social and political experimentation which “tests” a situation rather than exploring it, on the occasion of the setting up of projects or initiatives with the players concerned, in situations that implicate them personally and socially (see the project of educational chats in the context of combating corruption, or the analysis of the political, social and economic context). This is the *learning by doing* approach which fosters awareness of the problem and of the capacities present for solving it.

In conclusion, action research combined with a participatory method can involve the players of the group (young people or adults, men or women), lead them, through research and analysis of their environment, to gain an awareness of their situation and thereby develop their own common strategies, in a concerted manner, for improving their situation. The facilitator(s) in charge of supporting a group allow them total freedom of initiative, only helping along the approach undertaken by the group. The group also learns to find a solution, a consensus, beyond the daily experience and experiment with at least one alternative.

This method allows the network that is built up in this way to present the contents of an action research operation to allow other people to take advantage of the experience to find solutions to similar problems.

# Bustani: cultivating change through action research<sup>1</sup>

By Michel Séguier\*

*As part of Pole Institute's Garden of Change (Bustani ya Mabadiliko), civil society participants from various regions of DRC take part in action research "chantiers" (undertakings) related to their daily combats. The late Michel Séguier summarises here the essential points that emerged from a certain number of undertakings, allowing us to gain a better understanding of the critical elements of the approach.*

Drawing on a few key words defining action research, we show how each "chantier" group run during the Bustani concentrated on a particular aspect of action research.

Most of the "chantiers" or task forces took several criteria into account but we shall only quote each group once.

## Liberating dimension:

Action research is a process that liberates speech; it allows risk taking, putting oneself in danger by expressing one's ambiguities, contradictions, suffering, doubts and fears.

The "Conflict transformation" task force was able to take a frank look at the Ituri conflict, but above all draw some lessons from the fatal risk taking of the Nyamilima pilot group.

<sup>1</sup> Excerpt from: "BUSTANI YA MABADILIKO. Un jardin des changements à l'Est de la R.D. Congo", 2007, download from [www.pole-institute.org](http://www.pole-institute.org)

\* Michel Séguier, a guiding light in the struggles for change in Europe, Latin America and Africa, passed away in November 2014. His spirit and courage continue to be an example for us in our endeavours.

## Indignation:

The starting point of action research is a situation that is unbearable, inadmissible, unacceptable and infuriating in which one finds oneself stuck, blocked: this is what Paulo Freire calls a limit situation. What we are doing, what we are putting up with is unworthy of us, our living conditions arouse indignation and it is this feeling of revolt that motivates and mobilises us.

## Problem:

The task force working with women confronting sexual violence and their transition from victims to actors and their fight against impunity.

Action research starts from a problem, an actual, lived crisis situation, a contradiction in which we find ourselves; it is a black hole, an impasse, a problem with no apparent solution and which we don't know how to approach.

## Involvement:

The work on the spoliation of natural resources to the detriment of the Congolese people.

The actions with child soldiers and demobilised young people.

Action research is a context in which people can express themselves and speak to each other; get their feet wet; the researcher-actor does not push aside their values and judgement; it is a way not only of reading the world but of writing it: each individual becomes the author of their words and the actor of their world.

The “Responsible young people” task force, with its pilot group: “Synergy” and their actions of collective consciousness raising/empowerment.

## Commitment:

Each individual has the responsibility, before committing, of asking themselves: am I ready to commit myself alongside my companions and go the distance with them, taking risks alongside the people confronted with the problem?

The “Valorisation of Women” task force and their action research at election time with political literacy and production of the album of women conquering power.

## Trust:

This is built up by listening and engaging in dialogue, and allows us to say “difficult things”, to confront each other truthfully, confident that we will all try to put the common good before personal interests and, drawing on the strengths and potential of each of us, while accepting our weaknesses and our limits.

Research on mindsets and identities to find opportunities and the conditions for going beyond ethnic differences.

## Transformative action:

All action research aims at transformation, whether of the institutional environment or of living conditions or situations, with significant changes regarding the empowerment of people with respect to their own lives.

The “Citizen Action” task force. Information for change: with their production on governance and radio programmes designed as tools for continuous research/action/training.

*Paris, 11 June 2007*



# The Ebola epidemic: glimpses from Sierra Leone

By Sheku Kamara\* and Julia Krojer\*\*

*The Ebola epidemic has tragically changed the lives of people in several West African countries, including Sierra Leone and Liberia, where we have strong Civil Peace Service networks. Our Sierra Leone colleagues from SLADEA lost one of their drivers and his mother to the disease. Many are affected in numerous ways. At the end of 2014 we perceive a glimmer of hope it can be overcome in the next months. During the past six months or colleagues in these countries have focused their peace work on contributing to the fight against the disease, especially by information and capacity building campaigns in order to better arm the public. We also have initiated the first steps in launching a small action research to better understand how the epidemic affects people and what challenges we shall have to face in the aftermath.*

*Some impressions from our colleague Dr Sheku Kamara, one of the two coordinators of the Sierra Leone CPS, as well as excerpts from an interview with a youth from Freetown convey first impressions.*

Dr Sheku Kamara wrote in December 2014:

***Freetown at a glance:*** The statistics on Ebola indicate an increase in new infections. However, at a glance you don't see or feel this among the populace in the capital Freetown. I do not sense any panic from the peo-

\* Sheku Kamara is one of the two CPS coordinators in Sierra Leone.

\*\* Julia Krojer is a CPS peace worker with SLADEA who had to leave Sierra Leone, but keeps continuous contact with her colleagues and currently studies Ebola responses in Uganda.

ple. The Aircraft was full of people coming to Sierra Leone. Life appears to be 'normal' on the surface. This said, you don't have to look deep, just scratch the surface and you will see the impact of Ebola. You can clearly distinguish between the usual hardship that people went through at the best of times and the difficult situations they're now going through. There is real economic hardship and you sort of get the impression that people are more concerned about how they can survive on a daily basis than whether or not they shall contract Ebola ...

I sit in SLADEA's office everyday working with my colleagues on the BftW supported Ebola project. The office is situated at the heart of Freetown, at St. John Roundabout. I have roughly calculated an average of 10 Ambulances with Ebola patients passing every day. This is not the only route, there are several others. So, I get the real impression that the situation is not improving, and we lost yet another renowned Medical Practitioner, Dr. Victor Willoughby, to Ebola yesterday 17th December 2014. The Western Area Surge Operation started on the 17th December, 2014 and will continue for two weeks. The hope is that, infected persons in the Western Area will be traced and safely isolated and transported to Treatment centres in order to avoid high numbers of new infections. The BftW partners consortium is heavily involved in this operation which was declared by the President. So we still keep our heads up.

When you see people around during the day you get the feeling that they are not so bothered by Ebola anymore. That is not quite the case. Everyone is worried each time an Ambulance passes with a patient and thinks he/she might be the next victim. Talking to people, I get the impression that burial is a real issue. People always fear death, but this fear has intensified because of the manner of burial. No one wants to be buried in a 'Body-Bag'. This is interpreted as demeaning and a bad ending. So you find people wanting to pretend that their relatives have died but not of Ebola and this is contributing to the new infections. So now, irrespective of the cause of death, the designated burial team has to do the burial in a safe way and this is causing resentment in many parts of the country especially in the provinces. This is, however, now

being very strictly enforced and movements around the country are very much limited, especially in the hotspots.

Families who lose someone to Ebola really become devastated, mainly due to the 'unconventional' way of burial of their loved one, as well as the quarantine that follows. So we are piloting a Psycho-social support programme in some parts of our operational districts. We will spend Christmas this year battling with Ebola but really hoping that we can at least celebrate Easter in April next year (2015).

## A student from Freetown answers our questionnaire about Ebola in Sierra Leone

*Transcribed by Julia Krojer*

### ***What do I know about Ebola and how do I communicate on Ebola with my family and friends?***

I know that Ebola is a severe and fatal tropical disease that can kill a person in less than 21 days. I specifically communicate on the transmission of Ebola. Whenever I have a discussion on Ebola with a friend or a family member, I focus on the Ebola prevention regulations. No direct physical body contact, no touching of body fluids and if someone happens to fall sick ... It is mandatory upon the person or another person around to call the emergency Number which is 117. That call instantly connects them with health centers and officials. With this angle of approach I strongly believe that people can easily get better knowledge on how to avoid the Ebola virus disease.

### ***Has the Ebola epidemic produced any changes in my daily life? If so, what and how?***

Yes, very much so! My Education, my family, my intimacy and my daily wellbeing are all changed. Let me start with how the Ebola epidemic has negatively affected my education. Before the outbreak the

university had a tradition of closing in July and opening in October. But ever since the Ebola Outbreak our university hasn't yet opened ... and we are losing a whole academic year. The Administration has given the Government up to January for colleges to re-open but if this doesn't happen we are doomed, my education is doomed. This as a result will make me spend five good years on a four year degree program and also we are going to pay extra for registration. This is very unfair and frustrating.

Next, my family and friends, my intimacy. Now, it all has to do with body contact. Everyone including me knows that by avoiding direct physical body contact and hand shaking would save one from the Ebola Virus Disease. This has influenced my relationships with others and especially intimacy. Before now I shook hands with people to greet them and show full acceptance, I even hugged them to show love. However, all this is finished, as it is a threat due to the danger of an Ebola infection.

Another issue is my wellbeing; I am in constant daily fear. In this present crisis I trust no one and suspect everyone. This is my state of being. I have acquired more enemies than friends for this action but this is what I believe can save me from the Ebola Virus Disease.

*Have I changed my behavior due to Ebola? In what way and towards whom?*

Yes! I don't go out at night and I wear long sleeves; I also avoid direct physical contact and hand shaking. My only communication with anyone now is verbal even with my girlfriend. Every time I leave my house, I make sure I am dressed in long jeans with long sleeved T-shirts.

*What do I think about the different strategies and decisions taken by the government around the world concerning Ebola?*

I believe that the very best way to tackle this disease is from the transmission stage. Once the infected people have been gathered up and put in a medical Centre then Ebola will end.

*Who is fighting Ebola and how can you contribute?*

The government and other organizations like the Red Cross, international medical corps, etc. I can contribute by educating my colleagues, friends, neighbors and family members on how it is transferred and how one can avoid catching the virus.

*Does Ebola and the communication on it have implication on the perception of Africa and Africans worldwide? Does it have implications for relationships and perceptions between different African countries?*

The communication on Ebola has indeed some positive and negative implications. I believe that people want to save their countries so they are stereotyping Africans and Africa as a threat, the continent as well as the people. The positive aspect of this is that countries want to save their population from this gruesome disease.

The relationships between African states are ineffectual, full of mistrust, misconceptions and misinformation. Even on the same continent, fear is unleashed on the affected countries. I think that will have negative consequences for the continent as a whole.

*How do you think the situation will be resolved: how soon do you think Ebola will be defeated?*

I think Ebola is an unpredictable disease, no one can tell when it will be under control. However, I am seeing progress and development in the fight against Ebola. I think and hope that the crisis can be defeated by the middle of 2015.

*We have developed this questionnaire including elements relating to the challenges of the aftermath of the epidemic in Sierra Leone and Liberia. We hope to support and nurture a pro-active contribution by civil society to the political, cultural and economic issues.*

# Conflict Research & Capacity Building Workshop

29–31 January 2014, Kribi – Cameroon

## *Excerpts from the report*

By Flaubert Djateng (CPS/Zenü Network),  
Christiane Kayser (CPS/Bread for the World),  
Frank Wiegandt (CPS/AGEH), Pierre Fichter (DMJ/CPS)

## The Strategic Circle: a tool for transforming conflicts

*The “strategic circle” methodology is a process that combines several tools in a dozen stages to tackle conflict, understand it, approach it and try to resolve it.*

*It is a tool for both analysing conflict and identifying strategies and actions based on an in-depth strategic vision of peace.*

### 1. Timeline and changes

The conflict timeline is the starting point for analysing a conflict. It should throw light on the roots of the conflict studied, from which it is possible to discern the factors involved. The timeline also allows you to observe how the actors in the conflict change over time: their changes in position, behaviour, perception (perceptions before and after an event).

The timeline should therefore go back in time as far as possible. It should show how the different parties to the conflict perceive the events. It should also include the different actions undertaken to try to resolve the conflict in question and the changes observed over time and following these actions.

**Tool – The Timeline**

*A graph that plots the events on a scale of time, showing the perceptions of the parties to the conflict for each event*

*Example*

<i>Perception beforehand</i>	<i>date</i>	<i>event</i>	<i>Perception afterwards</i>
...	1930	...	...
...	1962	...	...



***Shows the different chronological points of view of a conflict***  
***Clarifies the perception of events for each actor in the conflict***  
***Identifies the events that are important in the eyes of the protagonists***

**2. The players involved**

Here it is a question of showing the players present in the situation that concerns us, of analysing the power relations between the main players but also of reflecting on the influence secondary players have on the conflict: what are the relative weights of each in the conflict? The analy-

sis of the players should make it possible to highlight the links between the different players involved, the set of alliances.

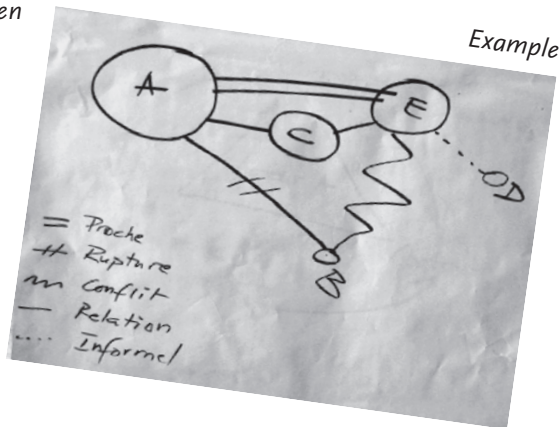
We should try to identify who has power in the conflict, which will help us to orient the activities during the implementation phase of the conflict transformation actions. From this point of view, it is interesting to show the players who are not a party to the conflict but who can play a role in peace: who could constitute an ally? We can also try to visualise our own position.

This exercise should be regularly repeated in order to integrate the new players who can take part in the conflict in question and observe possible new alliances.

### Tool – Player mapping

A graphic display of the interactions and links between the parties to a conflict, all the players present and the relations between them. The power relations become evident through the relative size of the actors in the diagram: different signs are used depending on the kind of relations

(the signs are given in a legend).





Purpose

**Make relations between the parties clearer**

**Clarify where the power is**

**Identify potential allies for conflict resolution actions**

**Understand what has already been done**

### 3. The perceptions of the players

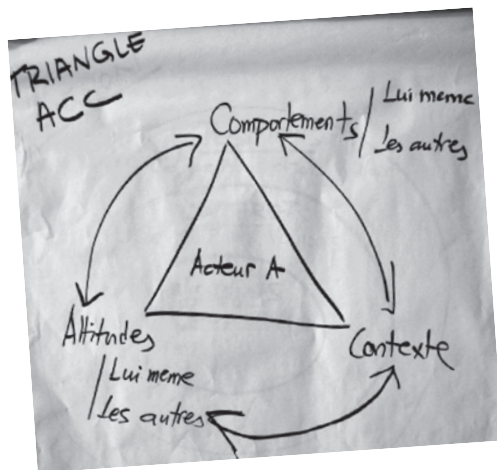
The study of perceptions analyses the perceptions of each player in the conflict in relation to themselves and to the others. This analysis will show the differences in perceptions and points of view in relation to the conflict, which will help identify the needs, interests and fears of each. We should also seek out the stereotypes and prejudices that feed the conflict, the better to combat them.

#### Tool – ABC Triangle

ATTITUDES – BEHAVIOUR – CONTEXT.

Example

A tool for analysing the factors related to the attitudes and behaviour of the actors, in relation to the context and the other parties to the conflict.





**Purpose**

***Identify the 3 factors for each key player in the conflict***  
***Analyse how these factors influence each other***  
***Identify the start and end points for intervention***

#### **4. Identifying problems**

This means identifying the problems other than those openly declared as the cause of the conflict, that is to say the underlying problems which have an impact on the conflict and its players. From the results of the first 3 stages: timeline, players and perceptions, we can ask the following questions. What are the real problems? How are they expressed? What is really “clashing” and at what level?

To do so, the reflection should be oriented according to certain factors: politics, culture, identity, gender, enforcement of rights, environmental aspects ...



**Purpose**

***Better understand the perception and behaviour of the players***  
***Give elements for the following stage of analysis of interests***  
***Extend the field of action to other activities in the peace building process***

#### **5. Analysis of interests**

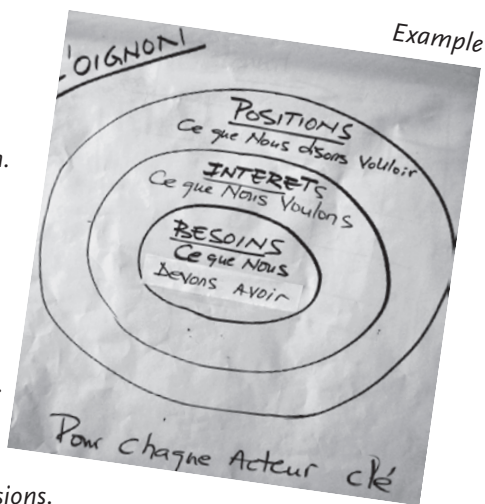
This means finding what the real interests of the parties to the conflict are, beyond the official, public position displayed by the different players. What are the individual interests? Are there any common interests? In what terms do the parties define their interests? Who profits from the conflict? What could block the transformation of the conflict?

To do this you should take into account the conclusions of the previous stages, in particular the analysis of perceptions and the identifica-

tion of the problems. We could understand the interests of each player by deciphering what they say, the rhetoric they use, etc.

### Tool – The Onion

For each conflict party, an “onion” of three concentric circles is drawn. These represent, from inside to outside, needs (“what we must have”), interests (“what we really want”), and positions (“what we say we want”). It helps identify common ground between groups as basis for further discussions.



Purpose

- Understand the interests and the needs of each player**
- Discover the “hidden” interests**
- Find common interests that could serve as a foundation for negotiations**

## 6. Search for strategies

This is when the reflection on the search for solutions begins, starting with all the information gathered in the previous stages. What is the strategy to adopt to achieve our peace objectives? How should we proceed to achieve enduring peace?

Here, we should therefore examine what has already been done. What has been done? What worked? What didn't work? What was left out?

What can be done? How can we adapt our strategy in accordance with the interests of the parties to the conflicts, depending on the problems identified?

We can also begin to discuss the possibilities (hypotheses) of alliances and synergies which will be gone into in greater depth in the following stages.

**Tool – The strategy grid**

*A graph or table that shows the different interventions on the conflict with the various social groups. Be careful! The grid is not a detailed action plan, but a tool for gathering together ideas for action to see what could be done and with whom.*

*Example*

		<i>Ideas for work</i>			
		<b>Create spaces for dialogue</b>	<b>Sports event</b>	<b>Human rights training</b>	<b>...</b>
<b>Group Structure Institution</b>	<b>Customary Chiefs</b>	×		×	
	<b>Groups of young people</b>	×	×		
	<b>Women's associations</b>	×		×	
	<b>...</b>				×



Purpose

***Find out what has already been done***

***Show up the gaps, the places where nothing has yet been done, the sectors not assisted...***

***Identify the possibilities of new work, joint work or mutual support***

## ***7. Inclusions and alliances***

Inclusion is the taking into account of the players working for the same cause. We should therefore reflect on what can help us to strengthen a peace process and how to integrate these players into our strategy.

It is on this basis that we can reflect in terms of alliance, by being attentive to studying all the possible alliances, and taking care not to exclude from the outset certain players with whom we do not have the same points of view. We must therefore apply survival logic to avoid finding ourselves too isolated.

In the same vein, we must also be prudent about entering into a coalition and scrupulously examine the gains to be derived from an alliance.

Of course, this work of alliance requires a number of questions to be posed beforehand. Is it possible and relevant to form such and such an alliance? How to establish trust between the players working for the same cause?

This stage of inclusions and alliances relies largely on communication and the networking of the players.



Purpose

***Facilitate the synergism that prevents certain strategies from disturbing the development of others***

***Extend the mobilisation capacity and the possibilities of the field of action***

## 8. Analysis of the risks

This is the analysis of the risk of aggravating a conflict situation through our intervention. Will our action improve the situation or make it worse? What is our real influence on the context and the players?

We should effectively start off from the principle that we are not neutral when we seek peace, for that is in itself a position in the conflict. We have to try to analyse how the different players see us, reflect on how to position ourselves, behave... How to manage our prejudices and show objectivity.

It is imperative to start thinking about this even before beginning a study on the ground, for the means of carrying out a study (interview, or survey for example) can have repercussions on the situation and abort as soon as a peace initiative on our part begins.

Upon completion of the risk analysis, we could see if anything has to be learnt before we start (capacity building needs) or if, for example, we must first test the strategy on a small scale (experimentation phase).

### **Tool – Do No Harm**

*The “Do No Harm” approach is a tool for analysing the strategies envisaged to make sure the work is not going to make things worse, based on the potential for peace and violence at local level.*

*The “Do No Harm” method in detail:*

<http://www.methodfinder.net/download57.html>

**Purpose**

***Identify the local peace forces and potential sources of violence***

***Analyse the influence of our actions on these forces***

***Identify needs in terms of capacities***

## 9. Action

Action is founded on the strategy that was drawn up beforehand taking the context into account. Then we should identify the level of work to be done. In peace work, there are 3 levels of action:

- ◆ Intervening directly in conflict
- ◆ Addressing the consequences
- ◆ Working on the social fabric

**Intervening directly in conflict** consists in trying to change the dynamics (transformation) and even achieve a peace settlement in some cases. Supporting a settlement can be done through several activities: establishing dialogue, mediation, organising negotiations or arbitration. This also requires supporting and conveying the voice of the population concerned, which includes activities of advocacy.

**Addressing the consequences** concerns the psychological and physical needs of the players and the population concerned. This includes working on post-conflict justice, pardon, such as the setting up of “truth & reconciliation” commissions. It also means working on trauma. This is therefore a work of moral reconstruction that also has to be understood as preventive action: reconstruction can prevent future conflicts.

**Working on the social fabric** concerns transforming injustices in societal structures that could give rise to destructive conflict in the future. This is therefore also preventive work, to avoid the deterioration of a situation.

## 10. Evaluation

Peace building is sensitive, delicate and highly confidential work. It is dangerous work in which one should advance with caution. Evaluation is therefore necessary for this is a **learning phase** about the path followed, the actions conducted. This is the time to draw the lessons from what has been done and see what can be done in the future.

To do so we must, from the outset, set up a peace action monitoring-evaluation system, based on **peace and violence indicators** in order to monitor changes in the conflict and the impact of our actions. What are the signs that the situation is calming down? What are the markers that show peace is stabilising? What is the level of mobilisation of the population in favour of peace? Have the players in conflict changed behaviour?

Learning also means **capitalising**. The evaluation should also serve to capitalise on the work, and so all the reports, studies and other documents gathered during the process should be archived.



## Case study: conflict between Bamoun and Bamileke communities on the left bank of the Noun (RGN)\*

### *Timeline of the two ethnic communities*

<i>Date/period</i>	<i>Bamiléké</i>	<i>Bamoun</i>
<b>End of the 13th century</b>		Foundation of the Bamoun Kingdom
<b>17th – 18th century</b>		The Bamuns pushed back the inhabitants of the RGN and then settled there
<b>Early 20th century</b>		The only chiefdom that covered the whole RGN agglomeration was Nkouffen-Njindoun, village chief is a Bamun
<b>From 1910</b>	Arrival of Bamileke migrants in RGN as labour force for colonial plantations and building bridges (according to some interviews, displacement was forced by their chiefs), and as refugees from the resistance	Peaceful reception of the Bamilekes, RGN very scarcely populated at that time

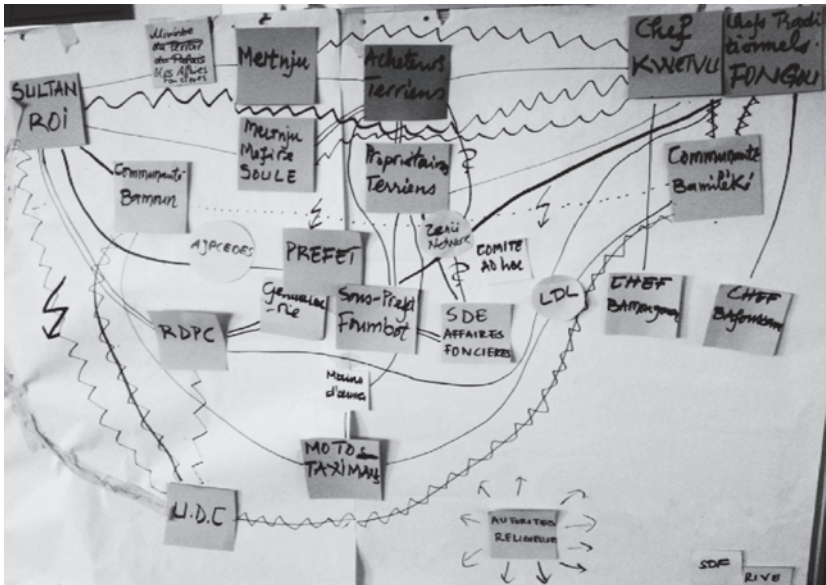
\* This research was conducted by the two NGOs AJPCedes and Zenu Network under the direction of Francis Emmanuel Njifenji, Greta Lenz and Flaubert Djateng. You can find the complete study report under [www.peaceworkafrica.net](http://www.peaceworkafrica.net). The timeline was completed in December 2014 by Greta Lenz and Francis Emmanuel Njifenji. We publish here only excerpts. The complete timeline can be found in the report.

<i>Date/period</i>	<i>Bamiléké</i>	<i>Bamoun</i>
1927/1929/ 1930	Creation of the left bank of the Noun by the colonial administration (in reality, the villages of the RGN were never really created, only the chiefs of the Bamileke communities became 3rd degree village chiefs by different administrative decrees)	
<b>Prior to independence</b>	12 communities are organised in chiefdoms on the extent of the RGN. These included: Bafoussam, Bamougoum, Bandjoun, Baham, Bangou, Bamendjou, Bayangam, Bangang, Kouffen/Njindou and Batoufam	
1960	“Palabre” discussion of the RGN chiefs on the question of the administrative attachment of the RGN to the Dept. Bamoun, administered by SP Foubot → favourable response from the eight chefs (out of 12) present, followed: ministerial decree	
24/03/1973	Fotso Jean appointed “Chief of the <i>autonomous</i> village of Koupa”	Unfavourable reaction from the King who starts to worry about desire for independence of the chiefs of the communities present in RGN
1974	Ordinance concerning land ownership system, providing occupants with the possibility of obtaining landownership deeds	
...	...	

<i>Date/period</i>	<i>Bamiléké</i>	<i>Bamoun</i>
<b>Towards the 10 April 2013</b>		A group of Bamouns arrives at the Kwetvü chiefdom, finds the chief's wife, beats her and then kidnaps a young girl for several hours (released a few hours later)
<b>11/04/2013</b>	Kwetvü chief holds a war council and the decision is taken to retaliate, in the presence of their elder sibling (element BIR)	
<b>13/04/2013</b>	The Bamileke decide to chase all Bamouns who grow crops in the village	The Bamoun hold a meeting at Koudounbain and decide to retaliate against the Bamileke's decision to chase them out of their fields
<b>15/04/2013</b>	Violent clashes in the RGN with one dead (Bamoun) + 1 victim who died later (Bamileke), several wounded;  The administrative authorities (sub-prefect and chief of staff) visit the ground to calm the two parties, the sub-prefect calls in the army to separate the two camps	
<b>16/04/2013</b>	On the scene, comes the governor, the prefect and the king to reassure the people and calm them down	
<b>April 2013</b>	The commission set up in September 2012 se réunit in the RGN, but se voit incapable of work for manque of the moyens and for non-poursuite of the recommandations formulés in 2012 by the haut hierarchy  Creation of a gendarmerie station in Momo, governor fills in the mapping of the land potential of the left bank (not done up till then)	

<i>Date/period</i>	<i>Bamiléké</i>	<i>Bamoun</i>
16/07/2013		Complaint by 38 Bamouns against the Sub-Prefect of Foubot that the forces of order in complicity with “the outsiders” are preventing them from harvesting their crops
2013/2014	Land is still being sold and land ownership deeds are still being issued in spite of the ban	
January 2014	The governor of the West Region declared the conflict settled, order and peace restored in the RGN (annual report 2013)	
08/05/2014	Decrees from the prefecture appointing 2 village chiefs (Jean Fosso in Koukpa; Ndebe Fokom Mohamed Moustapha in Kouffen)	
30/10/2014		Letter from the King to the Minister of Domain and Land Affairs demanding the cancellation of certain land ownership deeds on the left bank of the Noun (approx. 10)
01/12/2014	Clashes between the Bamoun and Bamileke communities in the village Njincha (left bank of the Noun), with one person killed	

## Mapping of the players



Below are the inputs produced during the workshop on the timeline and the Mapping:

It is important to take the timeline back as far as possible, in particular for analysing conflicts over land. To have as much detail as possible to identify the key moments in the evolution of the conflict. A differentiated timeline: with the elements of the 2 parties in conflict already shows how things have evolved in terms of perception.

The studies must be done by people from different parties (e.g.: both Bamoun and Bamileke students), which confers a degree of credibility on the study and enriches the analysis with exchanges of knowledge and perceptions...

(Spatial) mapping is important in this type of land-related conflict, so we should try to produce dynamic mapping that will facilitate conflict analysis. Chronological mapping could also be envisaged.

What allows us to assert that a conflict is not purely ethnic or that it is being instrumentalised ethnically by the customary or political elites for other ends?

Take into consideration spatial and demographic dynamics, land ownership pressure, competition for access to land, etc.

In Cameroon law the lines are blurred between modern law and customary law, which leads to this type of conflict, the jurisdiction of customary law is not clearly marked in terms of land management.

The State encourages the blurred lines, but at the same time, the State does not have the capacity and determination to prevent or settle this kind of situation.

How can we allow the groups in conflict to achieve an agreement that makes everyone a winner...

The visible and the invisible: the real role of the religious authorities? The nuances between official discourse and veritable position in relation to the conflict.

The role of the State: who is the State? Who represents the State at local level?

## Analysis of the interests and needs of the players

<i>Players</i>	<i>Positions</i>	<i>Interests</i>	<i>Needs</i>
<b>Village chiefs</b>	<ul style="list-style-type: none"> <li>◆ Land owners</li> <li>◆ Authorities on land and the people</li> <li>◆ Rights to the land</li> <li>◆ Autonomous</li> <li>◆ Legitimate (States and population)</li> </ul>	<ul style="list-style-type: none"> <li>◆ Have control of the land</li> <li>◆ Derive as much benefit as possible</li> <li>◆ Anchor their leadership</li> <li>◆ Be independent of the Bamoun king</li> </ul>	<ul style="list-style-type: none"> <li>◆ Authority, power, respect, prestige</li> <li>◆ Maintain a decent standard of living</li> </ul>
<b>The Bamoun king</b>	<ul style="list-style-type: none"> <li>◆ Holds the supreme authority over the land</li> <li>◆ Rights to the land (usus, fructus, abusus)</li> <li>◆ Guardian of spiritual traditions</li> <li>◆ Member of the political bureau of the CPDM</li> </ul>	<ul style="list-style-type: none"> <li>◆ Maintain authority</li> <li>◆ Take advantage of sale of land</li> <li>◆ Boost the presence of the Bamoun in the RGN</li> <li>◆ Take back control of RGN</li> </ul>	<ul style="list-style-type: none"> <li>◆ Take back control of RGN</li> <li>◆ Prestige, achievements</li> <li>◆ Security and stability in the kingdom</li> </ul>
<b>Administration</b>	<ul style="list-style-type: none"> <li>◆ Implement public policies</li> <li>◆ Represent the Head of State</li> <li>◆ Guardianship of the traditional chiefs</li> <li>◆ Guarantor of the public interest</li> <li>◆ Neither Bamoun, nor Bamileke</li> </ul>	<ul style="list-style-type: none"> <li>◆ Peace and security</li> <li>◆ Profit</li> <li>◆ Being well-ranked by the hierarchy</li> <li>◆ Improve living conditions of the people</li> </ul>	<ul style="list-style-type: none"> <li>◆ Peace and security</li> <li>◆ Anchor peace in the Noun area</li> <li>◆ Secure career</li> </ul>

<i>Players</i>	<i>Positions</i>	<i>Interests</i>	<i>Needs</i>
<b>The Bamoun community</b>	<ul style="list-style-type: none"> <li>◆ The feeling of being on their land</li> <li>◆ Legitimacy over RGN</li> <li>◆ Clinging to identity (threatened)</li> <li>◆ Feeling of being abandoned, neglected</li> </ul>	<ul style="list-style-type: none"> <li>◆ Enjoy and dispose of their land</li> </ul>	<ul style="list-style-type: none"> <li>◆ Security</li> <li>◆ To belong to a community</li> <li>◆ Physical presence of traditional authority</li> </ul>
<b>The Bamileke community</b>	<ul style="list-style-type: none"> <li>◆ The land belongs to the first occupants and users</li> <li>◆ They developed the land</li> <li>◆ The feeling of being at home</li> </ul>	<ul style="list-style-type: none"> <li>◆ Keep their land as a source of revenue</li> <li>◆ Derive benefit from it and satisfy their physiological needs</li> <li>◆ Secure their plots (land ownership deeds)</li> </ul>	<ul style="list-style-type: none"> <li>◆ Feel protected by the State and the traditional chiefs</li> <li>◆ Feel safe</li> <li>◆ Live in peace with each other</li> </ul>

Be careful not to mix up function and position, and interests and needs. Starting from the onion diagram, the exercise must really be applied. Ask what the expectations of the players are vis-à-vis a particular player...

Try to cross the analysis of the 3 dimensional context (political, cultural and economic) with the analysis of interests and needs.



## Search for strategies and alliances

Strategies Players	Create spaces for dialogue	Advocacy	Dissemination of information	Education programme	Capacity building	Improved land governance	Mediation	Analysis
King	+	+	+			+☑	+☑	☐
Mashut mutju	+		+		+	+		+☑
RGN Chiefs		+	+			+	+	☑
Administrative authorities		+	+			+☑		☑
CPDM	+		+	+				☑
UDC	+		+	+				☑
DDAF			+		+	+		☑
Ad hoc committee	☑		+	+	+		☑	☐
Religious authorities			+		+			☑
Gendarmes and police			+					☑
Young people	+		+	+	+			☑
Women	+		+	+				☑
Moto taximen	+		+	+				☑
Association of nationals	+		+	+				+☑
Land owners	+		+	+		+	+	☑
Mayor of Foubot			+			+		☑

<i>Strategies</i>								
<i>Players</i>	<i>Create spaces for dialogue</i>	<i>Advocacy</i>	<i>Dissemination of information</i>	<i>Education programme</i>	<i>Capacity building</i>	<i>Improved land governance</i>	<i>Mediation</i>	<i>Analysis</i>
<b>Sup. Chief of Mangoum</b>	+		+			+		<input checked="" type="checkbox"/>
<b>Trad Asso chief West</b>			+					+
<b>Bamengoum Chief</b>	+		+			+	+	+
<b>Bafoussam Chief</b>	+		+			+	+	+
<b>Elites</b>			+					+
<b>Development committee</b>	+		+	+		+		+
<b>Courts and regional courts</b>			+			+		
<b>MINATD (Minister in charge of Territorial Administration and Decentralization)</b>		+	+					+

Try to specify the role and skills of each.

Any production of capitalisation or awareness raising through brochures, the media or channel should really be monitored. There is a risk of recuperation by the media in particular if the channel is not sufficiently precise (role of the editor).

<i>Allies</i>	<i>Actions/Domain of intervention</i>
<b>CEPCA</b>	Distribution of actions, capacity building, peace education
<b>Zenu network</b>	Advocacy
<b>CIPCRE</b>	Capacity building, education through theatre, advocacy
<b>SNJP</b>	Advocacy
<b>CDJP Bafoussam Foubot</b>	Mediation, peace education, legal support
<b>AJPEDES</b>	Education on citizenship, capitalisation, communication
<b>LDL</b>	Education on peace, the law, legal support
<b>Media, community radio stations</b>	Communication, broadcasting
<b>Faith communities (Christian, Muslim, protestant...)</b>	Mediation, education
<b>Ad hoc committee</b>	Create spaces for dialogue, give impetus
<b>Association of traditional chiefs. From the West</b>	Create spaces for dialogue
<b>CSIC (Higher Islamic Council of Cameroon)</b>	Advocacy
<b>Youth municipal council</b>	Mobilisation of young people, dissemination of information
<b>Governmental programmes and projects</b>	Dissemination of information, training in setting up projects
<b>MINDCAF</b>	Mapping of land resources
<b>University</b>	Research, mapping

## Analysis of the risks

- ◆ Negative perception of AJP CEDES's intervention (negative propaganda from the part of certain players)
- ◆ Loss of objectivity in taking certain positions (risk of partiality)
- ◆ Being perceived as taking the side of one player in particular
- ◆ Be instrumentalised by the different players
- ◆ That the players expect a miracle solution from AJPCEDDES
- ◆ Picking the wrong ally

Have a shared timeline certified by certain key players. Have witnesses that are respected by both sides.

## Conclusion and outlook of the study\* (excerpts)

The study on the left bank of the Noun clearly identified the key factors and players involved in the conflict. A conflict whose roots are to be found in the forced and voluntary migrations in the area known as the left bank of the Noun during the colonial era, which were not framed by explicit legal regulations on land ownership questions for the former and new inhabitants of the zone. Since then, the questions of usage, ownership and sale of arable plots have created latent and open conflicts between the communities. The traditional chiefs at the head of these communities also bring questions of allegiance into play, which turn around an alleged special autonomous status of the villages in the area on the left bank of the Noun. This autonomy, beyond the manifestation of their refusal to submit to a superior Bamoun chief, is used to justify land ownership management in a very independent way for the purposes of personal profit, without the involvement of any other authorities official or not. To mobilise and align the population, the ethnic factor is exploited, which positions both the Bamoun and the Bamiléké as adversaries, and makes them forget the real interests of the people in positions of power. In summary, there is a conflict of allegiance and over land, but it is instrumentalised in ethnic form by the politicians and the traditional authorities; this conflict is reinforced by the speculators (who buy and sell the land), through the overlapping of traditional rights and modern legislation.

For AJPCEDS, as an actor in Cameroon civil society working for sustainable peace, the conflict situation and the regular outbreaks of violence in the Department of the Noun — our zone of intervention — are of concern to us. We should reflect on the interventions that con-

\* by Greta Lenz and Francis Emmanuel Njifenji, January 2015

tribute to reducing the violence and finding a sustainable resolution to these conflicts.

On the one hand, the principal targets of our work, young people, are directly involved in the conflict, as players and victims of violence. They also suffer the most from poor resource management and low political and administrative will to manage better, make better use of the riches and develop the infrastructure in this area. Working with and for young people is necessary to raise their awareness of the area's history and the issues at stake for peace and non-violent conflict resolution.

And young people are not the key players in these conflicts. To achieve a long-term improvement in the situation on the left bank of the Noun, it is indispensable to work with the traditional chiefs, the public administration and the political representatives. This work should engage a process of dialogue between the players, with the issues at stake being fair and transparent land management, as well as the roles and responsibilities of the stakeholders. The aim is to arrive at conventions and/or institutions that can lead the stakeholders to manage peaceful and effective cohabitation of the different players and communities on the disputed land.

## What we learnt from the workshop

### *The principal questions*

- ◆ How can we influence/mobilise the authorities?
- ◆ How can we position ourselves clearly as a peace worker and not be criticised as a disturbance?
- ◆ What are the deeper motivations of identity dynamics?

### *The principles agreed*

- ◆ Difficult not to be biased (include all the parties + outside people)
- ◆ Create an atmosphere of trust
- ◆ Check and be sure to act at the right time for each phase
- ◆ Analyse the current context + make a timeline on the basis of the facts and the perceptions of the key players
- ◆ Develop advocacy towards different key players
- ◆ Diversify resource-persons
- ◆ Avoid naivety (differentiate between public positions/hidden agendas)
- ◆ Develop research protocols (guides, questionnaires, etc.)
- ◆ Make sure you have a legitimate, transparent role
- ◆ Do No Harm
- ◆ Take into account past processes and the other players
- ◆ Give yourself time
- ◆ Keep control, do not become a sub-contractor!
- ◆ Draw up a mapping (map analysis)
- ◆ Analyse the broader context (degree of influence of the sub-regional and international context on the local context)
- ◆ Make the appropriate presentations (choose a framework, a time, guests...)
- ◆ Create alliances and synergies

- ◆ Choose a concrete case, look at it and analyse it in a more general context
- ◆ Open or latent conflict, the danger is of allowing a situation to deteriorate
- ◆ Goal: achieve a balance by non-violent means
- ◆ Analyse our capacities and strengths to be able to carry on to the end
- ◆ Heightening the awareness of the “victims” and other players is already a very important step in peace work

Share with the network the next steps to be accomplished around the conflicts you have started to study.

The first studies are very important, it is important to present them properly to be able to gain support and conduct in-depth work.

### *The shared approach*

- 1) Constitute complete documentation on a conflict and conduct an in-depth, participatory analysis involving all the stakeholders and promoting the putting into perspective and the timeline before any form of taking position or action.
- 2) Inform the stakeholders of the evolution of the complete documentation giving preference to transparency that reduces the risk of incomprehension or calumny in relation to the approach underway.
- 3) Pass round the complete documentation with in-depth analysis of the conflict within the CPS network in order to have new inside insights.
- 4) Publish, where relevant, the in-depth analysis of the conflict.



## Action research for a type of intervention suited to conflicts

### The approach of Dynamique Mondiale des Jeunes (DMJ) in Eastern Cameroon

By Pierre Fichter\* and Duplex Kuenzob\*\*

*Action research is becoming the preferential strategy of DMJ — as an actor for social transformation — to identify opportunities and possibilities for intervention on the ground. Although the organisation has had recourse to this procedure in the past without necessarily calling it ‘action research’, at the level of indoor workshops and during community facilitation sessions, the team from DMJ now intends to base its actions on information coming directly from the people and groups concerned and living in their usual environment. We would like, in this paper, to tell our recent story in relation to this tool.*

In the course of the year 2014, DMJ decided to launch two action research activities in Cameroon. The theme of the first was conflict dynamics and the situation of the displaced citizens from the Central African Republic in the eastern part of the country; the second dealing with young people being forced to join armed groups in relation with the situation in the Far North and the Boko Haram phenomenon.

While these studies express DMJ’s determination to work on conflict-related issues in zones where there is insecurity, the decision to adopt the action research tool as an approach inherent to our work for social

\* CPS

\*\* Executive Secretary

change and civil peace building in Africa, is more precisely in answer to 2 questions essential for our organisation.

How do we respond to complex situations for which it is necessary to take into account the real needs of the population concerned and understand the conflict dynamics they are immersed in?

How do you position yourself as an organisation seeking autonomy of action in order to develop approaches capable of having a long-term effect on the fundamental problems experienced by the communities?

The questions posed in this way reveal the ambition but also the scope of an intervention aimed at socio-cultural changes which, as we know, are determined by a wide range of factors. By socio-cultural factors we mean the structures of family, education, gender relations, religion.... Hence the knowledge of all problems of change envisaged, of the fundamental causes that typify them. To this, action research can make a valid contribution.

## A tool for treating the causes...

Treating the causes of a phenomenon means seeking to understand the past and present cultural and political aspects underlying the fragmentation process that is gaining ground in these territories. While the impact studies or household surveys commonly used by most of the humanitarian players are only a partial response to the deep causes of the crises they wish to handle, action research favours an intervention based on an understanding of the behaviour and individual or collective strategies.

The actions built around the results of the research could be a part of real work transforming conflicts aimed at long term change and not just meeting the momentary needs of well-targeted groups.

The research should also be focused on a study of the relations between the players. In-depth knowledge of the social relations would make it possible to include a maximum number of political, cultural,

economic or institutional players during the implementation of the activities. We can therefore easily understand that an action research process is part of a “do no harm” approach, that is to say, with a concern to not make the situation worse, to not exacerbate the existing tensions.

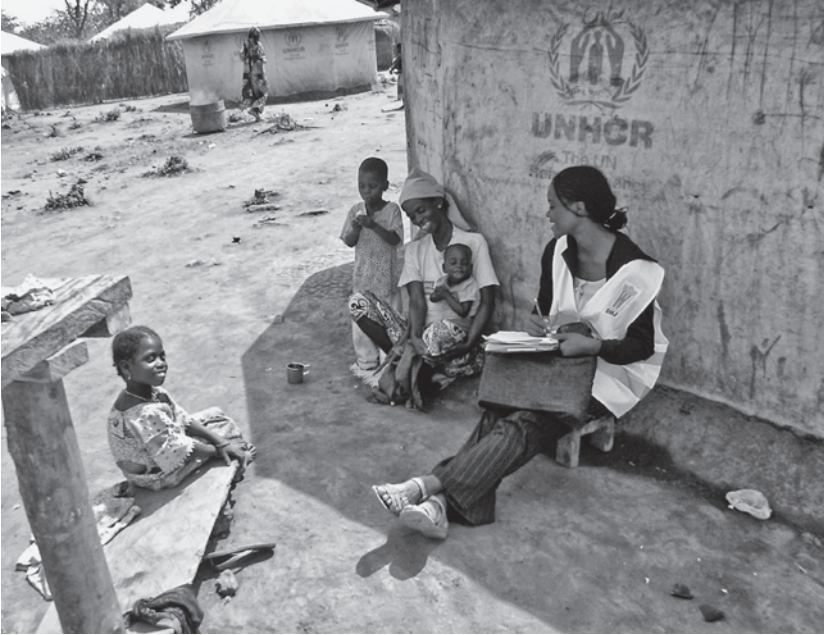
To be able to be pertinent in our intervention...

This is therefore the approach DMJ endeavours to apply today, precisely in the eastern Region, with, as the first stage, the study that was conducted in 2014.

In this border region touched by the crisis in the Central African Republic, the massive arrival of displaced persons since the end of 2013 poses the question of the management of the humanitarian crisis, in particular by the international organisations, and the question of the impact of this crisis on the communities concerned (local or displaced). Quite quickly after the arrival of the first displaced people, we heard talk of tensions in the host zones between these refugee groups and the Cameroon population, in this region that is traditionally unstable due, *inter alia*, to conflicts over land and the existence of activities related to mining.

We were also very concerned about the risk of exporting the Central African Republic conflict to the Muslim and Christian communities in Cameroon. While measuring the extent of the problem, the staff of DMJ wondered how it could contribute to supporting these communities in this extraordinary situation.

But was it pertinent for our organisation to intervene in the affected areas? We could have been led to take the easy solution of answering the call of the international organisations and working as sub-contractors within the framework of the census of the displaced population or going to apply the activities we carry out normally directly in other regions around interdenominational dialogue for example. It seemed to us that if we wanted to respond efficiently to the challenges of peace in



*A DMJ researcher in Gado Badzéré refugee camp (eastern Cameroon)*

this zone, we should start by implementing a process of in-depth reflection on the potential sources of conflict in this eastern region.

The study we had just undertaken allowed us, in the first instance, to familiarise ourselves with the displaced population, to have an overview of the diversity of the situations of these families most of whom live in refugee camps: what were their precise reasons for leaving home and coming to Cameroon, what kind of relationship do they have with the communities who welcomed them, with the Cameroon authorities, what do they think of the work of the humanitarian workers, how are the youngest experiencing the situation and what is the outlook for them today?

In the second instance, we also sought to understand the point of view of the Cameroon population who received the displaced people

from the Central African Republic and how their lives had changed since they settled in the camps. We also wanted to find out how this situation was managed by the authorities at local level.

This first study now calls upon another which will be oriented more towards a precise analysis of conflict situations that exist locally. The first surveys allowed us to identify at risk sites but also to see that in other localities, there are no major problems in terms of cohabitation between the communities. The research therefore already allows us to better target our future activities on the most sensitive zones.

Among the orientations we are currently taking in the development of our intervention in the east, the results obtained by the first study allow us to say already that a work of support to the local authorities in the management of these situations will be decisive for boosting stability in the zones concerned.

Even though, when the research started, the actions on the ground had not been fixed, the members of the DMJ team and the young people who took part in the survey are today convinced that *“for a programme to be viable and effective, a whole set of aspects needs to be factored in, including historical, economic, geographic, political and ideological, institutional and cultural dimensions”* of which better information is gained through action research.

## Action research as a learning approach...

To end, we shall consider that an action research approach should be a learning process for the people who implement it. It is in this sense that we wished to involve the young students in Yaoundé in this activity, principally students studying conflict management, international relations and journalism. We first of all trained these young researchers in understanding the topics of the research and the issues at stake, on the appropriation of the questionnaires and on the way to conduct the surveys in these zones and understand the people interviewed. We then

decided to leave them as much independence as possible on the survey zones.

Despite the constraints on the ground, the researchers gained an experience that showed them certain realities that they could not have imagined from Yaoundé and they came back with more in-depth views on the situation in eastern Cameroon, situations often simplified by the Cameroon media and by public opinion in general. The students' contribution also turned out to be very enriching for the DMJ team, which was able to take advantage of the freshness of their analyses, and the participation of these young people for the remainder of the project shall constitute a guarantee of the continuation of our work of peace building in Cameroon.

All in all, the use of action research suggests that we acknowledge that it offers a rich field experience for gaining an understanding of a situation from several angles, for it provides the means to interact with the first people concerned by a problem we wish to handle. However, it would be naïve to believe that the information provided by the multitude of players interviewed is all reliable or consistent. Which suggests a certain capacity to analyse the data collected and aggregate them to deduce tracks for concrete and practical recommendations.

# Action research, an opportunity for civil society to promote change

By *Flaubert Djateng\**

Civil society is being asked more and more to play a role in the process of improving the living conditions of the population and promoting quality values in their work spaces. The expectations become greater as governments announce they are undertaking decentralisation, processes supposed to give more “power” and leeway at local level, to new actors who in the past had no possibility of intervening in decision-making. Due to their increase in number, the plurality of the themes they deal with and the flexibility of their work methods, civil society organisations can provide answers to the challenges related to performance and to defending the rights of citizens, thereby becoming veritable agents of change.

Action research as an intervention method has allowed Zenü Network, a civil society organisation based in Western Cameroon, to make a substantial contribution to fighting the corruption which not only insults our dignity, but also greatly restricts our development potential. Like a hydra, corruption has invaded the different systems of our country; on analysis we wonder if we will ever beat it, so tentacular is the phenomenon, reaching into every sector. It is tempting to say that we can't escape it, to become resigned and give up. Action research offers an alternative, that of forging ahead armed with conviction and determination to shift the lines. At Zenü Network, we have noticed that cor-

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ruption proliferates because the victims/witnesses are often too afraid to denounce it. But how can they denounce it and protect themselves from reprisals? How can we really work on acts of corruption without risking defamation? To make our contribution, we have chosen to work in the youth sector and more particularly with young people in schools. Our contribution has been to set up MEPRODEC (a Mechanism to Protect those who Denounce Corruption in schools). Education is the basis for any kind of development. If the education sector of a country is dysfunctional, we can predict that the future of the country will be greatly compromised. In Cameroon, this State-managed sector is mainly funded by the parents. However, due to corrupt practices and other weaknesses related to governance, the sector faces immense difficulties, which have a negative effect on the running of the system. The consequence of these practices is the poor performance of the pupils, a high dropout rate due to the poor quality of teaching, emigration to find better performing schools, which leads to a brain drain, etc.

Action research recommends starting up a process that combines the promotion of types of skills (knowledge, experience, etc.) with guidance for key players following the logic of dialogue and rigorous thought. The hope is that this combination shall allow innovation to emerge from the experience of the players and provide new tracks for solutions to take us out of a disastrous situation that we want to change. Zenü Network initiated a study of the acts of corruption in schools, a study that encourages young people, teachers, parents, education authorities and youth clubs to talk. Not only did the study identify the key players, but we also created a framework for analysis and reflection on the phenomenon of corruption in schools by giving a voice to our interlocutors. Drawing on the cooperation agreement between the Western Regional delegation of the Ministry of Secondary Teaching and Zenü Network, we created a learning system that organises a “conversation with the situation” seeking to both capture the state of affairs (asking the question “what now?”) and to make the joint decisions that are necessary (in response to the question “what now?”).



## Working against corruption

The study conducted by Zenü Network in schools identified 83 forms of corruption. In the action research approach with all the stakeholders, the observations of the study were discussed together and four essential forms of corruption retained as the foundation for building the way out. These are:

- ◆ sexual harassment,
- ◆ poor management of the fees of the parent teacher association (APEE),
- ◆ the trafficking of marks (often in exchange for sexual favours),
- ◆ paying to avoid sanctions.

The originality of our approach compared to the usual work against corruption that emphasises legal aspects and the setting up of specialised bodies is that we concentrate on the “victims” and on fighting impunity.

Pupils, parents, teachers and headmasters are at the centre of the system.

When presenting the findings of the study, one of the parents offered to transform the suggestion boxes into denunciation boxes. These boxes would allow the victims to express themselves anonymously. Our approach facilitated the analysis of this proposition by framing it, following an innovative system called code of citizen denunciation, comprising four pillars:

1. School Clubs (for Cameroon, we adopted the official name of CECIN – Clubs for Education on Citizenship and National Integration)
2. Denunciation boxes
3. Governance observatories
4. Liaisons

Each pillar is adapted following an analysis and exchanges with the stakeholders. The current system has been tested several times in a real situation and adapted before a recommendation is made.

## School Clubs

The clubs group together pupils within an establishment with the aim of contributing to governance in school communities and promoting the culture to pupils. The questions of citizenship, in particular the fight against corruption, native languages and the traditional arts for pupils are the principal activities of the CECIN. Specifically, the aim of these clubs is to:

- ◆ strengthen and perpetuate citizen culture in young people in schools
- ◆ anchor the values of good governance in the school community and in society
- ◆ boost integrity in the youth community
- ◆ promote good citizen and cultural practices
- ◆ involve young people in the fight against corruption in the school community
- ◆ ensure members appropriate the tools and methods for fighting corruption
- ◆ boost the confidence of the educational community and the other stakeholders in the fight against corruption in the combat against this scourge

## Denunciation boxes

These are boxes in which victims/witnesses (pupils, teachers or parents) can place in writing and discreetly all the deeds and practices of corruption they have observed within an establishment. This box should be put in place prior to the start of the school year.

The location of the box affects the quantity and the quality of the denunciations within the school. And so they should be placed where users/whistleblowers will feel free to use them. We recommend that members of the school club decide where to position the boxes. Each establishment should have at least two boxes. Each box should be secured by two padlocks, the key to one being held by a member of Zenü Network and the other by pupils who are members of the school club.

The denunciations contained in the boxes are processed following a frequency defined by the students according to the following procedure:

- ◆ The supervisor (teacher in charge of the school club), accompanied by the President of the club and other members, empty the boxes of their contents and process them in a room chosen for the purpose.
- ◆ The chairs are arranged around the table, so that all the participants can see and observe the operations.
- ◆ A member of the processing commission reads each denunciation out loud and it is immediately recorded under the following headings:

<b>No.</b>	<b>Date</b>	<b>Acts of corruption</b>	<b>Remarks</b>

- ◆ Minutes of the processing session are produced and a copy given to the observatory and another to the head of the establishment.

### **CITIZEN DENUNCIATION PROCEDURE**

Denunciation presupposes that there are elements enabling a better appreciation of the process. In particular:

1. *Description of the corrupt act.*  
This description should relate the facts as they took place without leaving out any details.
2. *Name or job position of the perpetrator of the corruption.*  
This means the name/job position of the person responsible for the reprehensible act you are a victim or witness of.
3. *Place where the act of corruption took place.*  
This information is decisive because it means the pertinence and veracity of the act denounced can be verified in a timely fashion.

4. *The witnesses to the act (who saw, heard, are aware of)*. Say whether there were people present when the act was committed.
5. *Date and time of the act of corruption*.  
It is important to specify the date and time the act being denounced was perpetrated, for this enables a better appreciation and constitutes incontrovertible elements of proof.
6. *Other information*.  
This means any other information that could be useful for the appreciation of the act of corruption committed.

### The observatories of governance

The observatory of governance means the central, independent body in charge of identifying acts of corruption within the school, analysing them, proposing actions in favour of their eradication and protecting the whistleblower. In this sense, the observatory's main task is to confirm the veracity of the acts denounced. The members are identified during a participatory approach involving the whole educational community on the basis of the criteria of availability to contribute to the struggle against corruption, discretion in action, clear, unequivocal commitment and integrity and impartiality in the analysis of the facts denounced.

### The liaisons

Just like the observatory, the liaisons play the role of protector of the whistleblowers who denounce corruption. They can be any person who is accessible, available, reserved, and recognised for their proven integrity.

The liaisons protect the whistleblower in the sense that any victim of acts of corruption can refer to them and come and see them with no risk of reprisals or of another denunciation; they ensure the anonymity

of the whistleblower. The liaison is the spokesperson and the referent of the victims. After listening to the victim, they give the information to the observatory for investigation and confirmation. The liaisons are identified each academic year by the pupils and proposed by the members of the club to the administration of the establishment.

## Positive effects of action research

Zenü Network operates in the form of a network. The idea of a network presupposes the sharing of knowledge and the pooling of skills, but above all the desire to grow and progress together effectively. For the members of Zenü, a joint commitment to enhanced quality is necessary in an environment where the culture of constructive debate, of healthy discussion and accountability is not the thing that is shared most. Today, the Zenü network can be proud of its regional reach, with around thirty associations in the 8 departments of the West region, and a capacity for action and potential for mobilisation unrivalled by other organisations up till now.

By adopting action research as an intervention method we have made interesting progress. We have been able to help lend meaning to the word “participation” when speaking of public policies; meaning that allows civil society organisations to be involved in and no longer merely associated with public policies. We have designed and tested a system that today is adopted and promoted by the Western regional delegation of secondary teaching in Cameroon, a local structure in charge of conducting public policies in the secondary education sector. We have also boosted the mechanisms that allow experience in the field to facilitate decision-making. Action research facilitates enhanced management of knowledge and know-how and enables a clear link to be established with decision-making. By ensuring cooperation with the State players in the education sector, we have organised a system that builds the “political” capacities of civil society organisations, while opening up the debate on



questions of governance, citizen mobilisation, the creation of alliances and networks for enhanced quality, advocacy, creation of spaces of accountability, etc., a capacity to create added value in all development actions. And lastly, this work has enabled partnership relations to be set up that promote quality and experience and not the suspicion and power struggles so often observed among civil society organisations.

This process took place with eight network focal points, sixteen secondary establishments with thirty two thousand young girls and boys, eight department delegates, one regional delegate and a unit for implementation and monitoring composed of Zenü Network coordination staff. We have encountered some difficulties. At the level of the school headmasters, all were not enthusiastic, two committed acts of sabotage with malicious gossip and a campaign to discourage the children from joining MEPRODEC. We also noted that some very committed headmasters were exposed. They received threats from the teachers punished who had connections in high positions at the Ministry, to the extent that, during the evaluation, these headmasters asked for a system

to protect principals! The absence of a way of encouraging the teachers supervising the clubs led to some of them feeling discouraged.

MEPRODEC, based on a continuous action research process, has turned out to be a useful instrument that helps the victims of corruption to express themselves, encourages the search for quality and pushes the people in charge to do their work, punishing acts of corruption and playing their role of guarantor of the quality of education. If the Ministry were to adopt it for the whole country and add measures to encourage committed teachers, the education system in Cameroon would recover some prestige.

**An evaluation of the MEPRODEC brought out the following strong points:**

- ◆ Participation of the target people in spaces for analysis and reflection (department delegates, headmasters, club members, liaisons and people in charge of the Zenü Network focal points)
- ◆ Denunciation boxes have become a tool of governance in schools; it is not only acts of corruption that are denounced, but also facts that contribute to the poor management of the education of children such as, for example, poor preparation of lessons by teachers, cleanliness, etc.
- ◆ The desire of the regional delegate and of certain department delegates to see MEPRODEC extended to other secondary schools in the region
- ◆ The valorisation of MEPRODEC on the school boards and the meetings of parents
- ◆ The commitment of the headmasters to see the promotion of citizen values written into school curricula

- ◆ The wish of the project stakeholders to see public and private schools become anchorage points for combating corruption
- ◆ The establishment of responsible citizenship minutes in certain establishments
- ◆ Pupils have acquired a taste for responsible denunciations
- ◆ The refusal on the part of students to give gifts to teachers
- ◆ The clubs help to correct behaviour in the schools
- ◆ The creation of committees for integrating elements of the code of citizen denunciation into the school rules
- ◆ The creation of directories of responsible behaviour available in certain establishments that implement MEPRODEC
- ◆ The reduction in extortion, child pregnancies and sexually transmitted grades
- ◆ The reduction in vandalism and an improvement in hygiene given the increased awareness of the members of the clubs
- ◆ The desire of the students in the clubs, liaisons, headmasters and department delegates to see MEPRODEC's activities perpetuated
- ◆ The culture of citizenship and integrity is growing in pupils who are members of the clubs (awareness raising campaign about the voters roll)
- ◆ Awareness on the part of the participants of the analysis spaces that the fight against corruption will start at the level of the family cell and that children must be "spiritually and intellectually educated" and not just "physically raised".



# Linking Citizenship, Participation and Accountability

## A Perspective from PRIA

By Rajesh Tandon\*

Exclusion of the poor and the marginalised from the development process has given rise to the concerns for active citizenship, responsible participation of people and accountability in the development process. Such concerns seek alternate forms of development, which foster more inclusive and deliberative forms of citizen engagement. The Development Research Centre (DRC) on Citizenship, Participation and Accountability aims to re-cast such concerns on inclusion, participation and accountability in a rights-based and citizenship-centered mould both in theory and practice.

With this agenda, there is a greater recognition that development initiatives should more adequately consider the complexity and diversity of poverty, be built from the 'bottom up' rather than from the top-down, and respond to the praxis of social equity and justice. There is also a greater recognition that participatory decentralization and democratization are key to development initiatives. New forms of decentralization and local governance potentially offer new spaces for citizen voice and the construction of new forms of citizenship. With the concerns about good governance and state responsiveness have

\* A version of this article was previously published in PRIA's publication, *Innovations in Civil Society*, Volume 1, Number 1, July 2001 and is based on a presentation given by Rajesh Tandon at the inception workshop of the Development Research Centre on Citizenship, Participation and Accountability, 22–24 November, 2000.

also come issues about the capacity of citizens to engage and make demands on the state. Participatory citizenship calls for the development of awareness and knowledge of rights of citizenship. A conceptual elaboration of the themes of citizenship, participation and accountability in a human rights perspective will facilitate the understanding of the potential of new spaces for citizen voice and the strengthening of citizen voice.

For the last twenty years, the Society for Participatory Research in Asia (PRIA)—a non-profit, international centre for learning and promotion of participation and democratic governance based in New Delhi, India—has been promoting people centered development initiatives within the perspective of participatory research at a local, national, regional as well as a global level. PRIA's vision of a desirable world is one where relations across individuals, families, communities and nations are characterized by values of equity, justice, freedom, peace and solidarity. It believes in creating a balance between economic and social development; it focuses on ecological regeneration based on local priorities. We seek a world where citizens' rights and responsibilities are carefully nurtured through a balance between authority and accountability, and where individual freedom is sustained with collective solidarity for public welfare/well-being.

At the core of PRIA's work has been the promotion of participation and empowerment of the poor, the oppressed, women, dalits (lowest castes) and tribals. At times, PRIA has worked directly with these groups and at times has also carried out interventions through intermediary organisations. Building on the premise that "knowledge is power" PRIA aims to strengthen popular knowledge, demystify dominant concepts and promote experiential learning and people's participation.

Empowerment for PRIA involves the twin processes of learning and organising, linking the efforts and challenges of promoting people's participation and democratic governance through local grassroots action with a systematic documentation of the processes involved. PRIA's work has spanned micro-action in local settings at the grass-roots level

to national and international initiatives on the same issues, which arise organically in response to emerging opportunities and trends.

PRIA's intervention on facilitating participation of the poor and the marginalised is influenced by some key approaches to participation, which have grown both from our conceptual understanding as well as from our practical experiences of participatory action research. In the article below, I will share some of these key conceptual lessons, as well as describe some research projects which we are now developing in conjunction with the Development Research Centre on Citizenship, Participation and Accountability which we hope will develop our learning further.

## The importance of the historical approach to the spaces for participation

An historical approach to participation implies looking at forms of participation both in the traditional and modern context. In India, both of these forms of participation coexist. There have been, and continue to be, traditional forms of participatory mechanisms in the caste, village or tribal indigenous communities. These are often voluntary, self-help informal initiatives of people arising out of their needs, characterized by a recognition of their dependency on each other. The people's traditional groups are largely independent of any kind of external inducement. They provide space for citizens to articulate their demands, to negotiate and to influence decisions which affect their lives. They also play an important role in their struggles for justice and a good life and facilitate the organization of community and collective action.

Traditional spaces for participation increasingly sit side-by-side, with other externally created spaces. Development projects of a large-scale nature under the aegis of Government and bi-lateral and multi-lateral agency programmes have, of late, led to the creation of a number of village level development committees, which are primarily sectoral, and

project-based. In addition, the 73rd Constitutional Amendment Act in 1993, by constitutionalizing the Panchayati Raj Institutions (PRIs) as a third tier of governance and the Panchayats as the local elected grassroots level governing body, has provided yet further opportunities for people's participation in local development. The modern forms of organization like village education committees or watershed committees, and the modern forms of local elected bodies are characterized by formalized relationships. These organizations are often externally induced and guided to meet predetermined objectives. In India, both forms of participation simultaneously exist: the traditional village forms work alongside the project or sector based development committees and the elected bodies.

At the local level, then, there is a multiplicity of potential spaces for participation. In a current research project related to the DRC on Citizenship, Participation and Accountability, PRIA is exploring further the linkages, conflicts and dynamics between these traditional, development and statutory decentralised local bodies in forestry and watershed management projects. These institutional mechanisms are working in a village community simultaneously with overlapping jurisdiction. All claim to shape and determine community involvement on various issues at the grassroots level. While the dynamics of participation, and even the identities claimed by citizens in these multiple spaces may vary, it is often the same individuals within the village who are involved in the same institutional structures, each set up to ensure people's participation in their separate programmes.

At the same time, such multiple forms and sites of participation challenge the myth of the homogeneity of community, as the interests of members may vary within and between each type of institution. In each space, contests over whose knowledge and whose voice are legitimate will affect who participates and with what outcomes. Moreover, the separation of participatory forest management and participatory watershed management agendas through multiple committees may create dangerous complacency by diverting from the cross-cutting issues

related to local networks of power and resource use. Consequently, they run the risk of degenerating into merely another way of co-opting the excluded and the marginalised citizen into the agendas of the powerful.

Through studying and engaging in the dynamics of participation at the local level, it becomes clear that it is a fallacy to assume that the 'subaltern' consist of a simple and homogeneous group of the poor, and have-nots. On the contrary, they are a highly stratified group. Taking the issues of control and ownership as a point of departure, we find that differences exist within each stratum of the subaltern. The differences are profound and extremely complex within categories of caste, class, gender and ethnicity. By overlooking the in-built dominant relations of power and production within the social system, we undervalue the situation of shrinking spaces and options of various categories of subaltern. A more nuanced subaltern view will take into consideration the columns and rows of participation between different strata. The various potential spaces for participation are in fact shaped by different vertical and horizontal formations and relationships.

## Political and Cultural Meanings of Participation and Citizenship

Historically, much of the work on participation has been on its political meaning, which has been inevitably linked to people's relationship with the state. People are defined either as beneficiaries or as voters. They are either beneficiaries of the government largess or patronage or development programme, which means 'you sleep, and the state delivers', or mere voters, which means periodically 'you exercise your vote and then forget about it until the next election'.

Citizens in India, as perhaps elsewhere, are becoming mistrustful of public institutions and government agencies. They are becoming apathetic towards governance and dependent on the state for their welfare. This is one of the things that we discovered in the 'Citizens and Gov-

ernance' study conducted for the Commonwealth Foundation (1999). This report is based on the answers given by thousands of ordinary citizens, citizen leaders and citizens in influential positions in 47 Commonwealth countries, to a series of questions about the kind of society they want future generations to live in, and the role of government and citizens in creating it. There was a clear demand in citizens' voices that they be treated neither as beneficiaries of government program and schemes, nor as voters occasionally electing their representatives — but as active citizens who participate both in public arenas as well as in their own associations and communities.

Our study further revealed that people did not perceive themselves as citizens in the normal political sense, that is in a state-citizen relationship. The growing alienation from the state has resulted in increasing marginalisation of a large section of people who have been denied access to political institutions and their own traditional structures of community and habitation. For instance, a group of immigrants from Kerala, who went to the Gulf for employment, felt they did not belong when they returned to India. The classic situation was the Gulf war in 1991, when the state abandoned these people. Politically, they neither belonged to Kuwait nor did they belong to India. But they saw themselves as citizens in the cultural context. The cultural meaning of citizenship was different from the political meaning, and is linked more to a sense of belonging and responsibility toward community, fraternity, and kinship groups rather than towards the state.

## The Individual and the Collective Notion of Citizenship

Citizens gaining voice and choice are the key challenges facing us today. The central issue is, therefore, the restructuring of the system and polity, which protects the liberties and rights of the poor and the marginalised. However, there is a need for re-thinking what we mean by the 'politicization of the participation of citizens' — not in an electoral sense

but in basic sense of developing active citizenship. The conception of active citizenship must be based on an understanding of cultural diversities and multiple identities as well as on an array of alternative systems of survival and sustenance. Direct participatory democracy, to change the existing discriminatory institutions and practices throughout the society entails tolerance for the plurality of culture and of perspectives on citizens' actions.

Individual notions of citizenship, which often underlie concepts of active citizenship, are directly linked to discourses about merit, entitlement and contractual relationships. They transcend the collective identities of kinship, caste and communities, and thereby, negate some fundamental principles of communities and ascribed identities. On the other hand, kinship, caste, community, social obligations, cultural relationships and religious forms of participation, are traditionally collective in nature, and also demand forms of active participation and allegiance. In these indigenous civil societies, public service is desirable for its contribution to the advancement of the collective good. The common good is defined in a collective sense within a larger framework of common good, as opposed to one based on individual rights and gains. In our context, we are not exactly in the postmodern world, which is based on the assumption of motivating individuals to pursue self-interest vigorously. We are, in fact, somewhere in the interface between the posttraditional and pre-modern state of world. As a result, the collective nexus of the two approaches is unavoidable.

The different sets of discourse on citizenship provide conflicting forms of legitimization. At times, these contrasting discourses are interrelated, where different groups of people cooperate in their struggle for recognition and resources. Sometimes, there are tensions in the rights and obligations, as inherent in the individual notions of citizenship, with those claims and obligations that the same individuals enjoy as members of kinship, caste, community, socio-cultural and religious groups where forms of participation are collective in nature. Alternatively, the collective rights may exist in tension to each other. Different

members within existing groups compete with each other for access to resources and recognition. There is a need to examine the relationship between the individual and the collective and the meaning that these have for the forms of participation and rights to participation.

The creation of a new state of Jharkhand in Eastern India provides an interesting opportunity to understand further the various images and meanings of rights and citizenship (and is the site for a current PRIA research project on the subject). Jharkhand is predominantly a tribal region, rich in natural resources. Yet the tribals in this region live in penury. Their history has been one of exploitation, subjugation and marginalisation. The creation of Jharkhand was the result of a long struggle by the tribals who, on the basis of their separate cultural identity and in opposition to various forms of exploitation by the non-tribals, laid claim for a separate province. Creation of the Jharkhand State in some way is an expression of their will to break loose from the exploitative past, and break new ground.

At present the key issues of concern before the tribals of Jharkhand relate to their cultural alienation, political alienation and economic alienation. The state apparatus, with its brahmanical worldview and centralized top-down approach to development in the area, has dispossessed the tribals of their livelihood, culture and religion. It is important that the new state is constructed from the bottom by utilizing the indigenous resources both human and natural. If in the changed circumstance of a new state, the new objectives like establishing self-rule autonomy, respecting traditional forms of tribal governance, and supporting eco-friendly economic enterprises and life-oriented education are not continued, then the tribals will become aliens in their own land. The tribals have got their territory “Rajya” but now they have to assert for their self-rule “Raj”, which is their right.



## Broadening the Meaning of the Public

As we attempt to understand the meanings of citizenship in different contexts, there is also a need to re-formulate our understanding of what is public and what is private. Common conceptualizations have resulted in a definition that equates private with what goes on within the family and public with what concerns the government. It is important to recognize that private opinions become the basis for evolving a public position and the question of privacy is a relative issue within a broader framework of a community. Similarly everything that is of public interest, everything that concerns the public arena does not automatically become a concern for the state or its agencies.

There are three issues in the meaning of public. The first one is 'public good'. We are very concerned, in our context, to explore how public good is established, and how it is contested and how any kind of broad-based consensus, even if not a permanent consensus, is reached. Frankly in our society, there is no 'public good' consensus at the moment. There are contestations on a whole range of issues, from basic education to globalization.

The second issue is about 'public institutions'. We increasingly believe that public institutions do not only mean government institutions. We believe that they include all institutions, which operate in society in a public manner. Private sector institutions, which increasingly use public resources, civil society organizations and NGOs, are all public institutions because they operate in public space, and act on public issues.

This leads to the third issue *vis a vis* 'public accountability'. We are particularly interested in what we are beginning to call multi-party accountability. We are beginning to experiment with different parties holding each other accountable, as opposed to the exclusive notion that there is only one way accountability.

In our work in Maharashtra, for instance, we are using the concept of multiparty accountability to engage local communities, industry and government in promoting more just and equitable industrial develop-

ment. Within the context of the industrial development process, implicit contracts exist between various actors/stakeholders in terms of rights and responsibilities that they are entitled to and expect of one another. But often these remain unarticulated. As a result, the responsibilities of the institutions towards the rights to safe and healthy living and secure livelihood for workers go unfulfilled. On the other hand, the mobilization of community participation through such efforts as participatory health and environmental monitoring can be a powerful tool for demanding accountability. This requires demystification of concepts (like environment audit, disaster management) and laws (e.g. pollution and clearance procedures, self-regulation, etc). Information, evidence and an enabling space for open and transparent public debate are powerful tools for creating a culture of accountability.

### Linking Citizenship, participation and accountability – the governance wheel

It is one thing to debate the three concepts of citizenship, participation and accountability individually and approach them singly, but it may be worthwhile to think about how they fit together. We need to look at how participation assures accountability and how a sense of citizenship enables participation. I look at three of them together as a 'governance wheel'.

Participation is about the involvement of all stakeholders, the state and the non-state, through a process of communication and negotiation to influence the decisions that affect their lives. Participation leads to the creation and sustenance of accountability. A sense of the right to accountability provides the basis on which citizens can act. It leads to openness and transparency in policy making. Such accountability builds up social reciprocities characterized by equity, inter-group tolerance and inclusive citizenship. Responsible and active citizenship, in turn, results in meaningful participation.

There is yet another reverse perspective on the synergy amongst citizenship, accountability and participation. Citizenship gives the right to hold others accountable and accountability is the process of engaging in participation. An active citizenship would assert itself by seeking greater accountability from service providers through increased dialogue and consultation, and by monitoring and assessing performance externally and mutually. The concept of citizenship encompasses the concepts of social rights, social responsibility, and social accountability. Thus, the accountability induced by an active citizenship would necessarily have a participatory dimension.

Either way, citizenship, participation, and accountability together form the basis of 'governance wheel', which move in an integrated, inter-linked, and synergised manner and which affect each other in a dynamic relationship. Citizenship, participation and accountability are in fact essential components of any kind of meaningful governance, not just in government institutions but in all institutions which occupy public space.

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# “Action research”

Some theoretical notions\*

## The notion of “Action research”:

Social research method that aims not only to gain a better understanding of a given social problem, but also to help solve it. Research as a means of action.

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## The principal stages in the Action research approach:

*First stage:*

- ◆ Identification of the problem and formulation of the research question.
- ◆ Research techniques and design of data collection instruments.
- ◆ Drafting and presentation of the individual research projects.

*Second stage:*

Fieldwork phase:

In their place of work, during the study, the participant is supervised by the management team.

*Third stage:*

Workshop to present findings:

Consists, for example, of a feedback forum during which the results of the Action research study are presented to the audience for appreciation.

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\* Source: <http://1libertaire.free.fr/Recherche-Action01.html>

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## **An Action—Research—Training process:**

- ◆ **Research**, because nothing should be set in stone, as science is, by definition, a spirit of inquiry.
  - ◆ **Action**, because the research will be carried out on a site where verification is possible
  - ◆ **Training**, because lessons can be drawn from experiences analysed and we really change what has to be changed.
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**Action research** is a form of research that pursues two goals at the same time: the production of knowledge and a change in reality through action.

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**The cyclical nature** of action research (Dick, 2000; Dick, 2002) makes it an adequate method for studying a rapidly evolving domain, that is to say a domain that is becoming.

**Action research can be defined** as action and research (Dick, 1998; Gill and Johnson, 1991; Gumesson, 1991). Action with the aim of implementing a transformation (for example, projects that improve learning efficiency), research with the aim of acquiring knowledge of the domain studied. Instead of formulating hypotheses to test, we have results to achieve.

To do this it is necessary to accumulate and create knowledge in the domain of action studied: what is the value-added of e-learning according to the students, how do they perceive the lessons devised in terms of our educational framework, etc.

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## “Action research” type.

It proceeds by global and transverse approaches in all fields

This global approach must include the social and political dimensions related to the concerns of the decision-makers and social trends

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The dynamics it instigates in terms of reflection, action and research cannot be circumscribed in a single phase; it also requires, as in the action research processes, the setting up of a collective player.

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A common, participatory action research approach

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Action research approaches with the different players to draw up suitable joint responses

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From within the research trends that purport to work “with” rather than “on” teachers, and which acknowledge their “skills as players in context”, we should remember that **collaborative research** is part of a set of practices that are participatory for teachers, and which come under a variety of names: **action research, collaborative research, collaborative action research, participatory research, research in partnership**, etc. The borders between these diverse practices (and between the different practices that come under the same name), are predictably not hermetic and no doubt should not be so. In a way, they represent the particular accents of those who speak the same language, who see teachers’ participation in research as an essential contribution to the development of knowledge related to practice and, of course, to the development of the practice itself. This does not make it any less important for these so-called participatory research practices to clarify their

model, to extract the rigour from the underlying specific approach of the model and open the way to those who would follow.

### **History**

The action research approach, in the spirit of collaborative research, takes off in the 1940s and 1950s. The term refers to a practice that deliberately “researches” a real context, in reaction to “laboratory” academic research, which ignores the complex reality of practical situations. The manifest intention is also to turn teachers into researchers able to produce more suitable knowledge for the needs of the practice. Criticised at the time for its distancing from the traditional scientific method and thereby considered lacking in methodological rigour, action research lost some of its impetus towards the end of the 1950s.

A second conception concerns the “thoughtful practitioner” and the approach of analysing the practice through which a teacher can be led to re-frame or extend their action skills (Schön, 1983, 1987). A third conception emerges from the trend that Richardson combines with a systematic approach through which a group of teachers from a given milieu tries to understand and improve their practice by identifying and analysing a problem they share and that they try to resolve (Elliott, 1976, 1990).

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## **The Principle of action research**

Research oriented towards action in the cooperation for development seeks to bring about social change. It apprehends the existing structures at the base, supports the independent activities of local initiatives and encourages the forming of groups.

In the continuous work of a nation it encourages the efforts of the population to articulate their problems, develop alternatives and take decisions autonomously. It produces a joint assessment of the results for all the interested parties, the condition for other measures of encouragement. In this sense, action research is fundamentally participatory.

By removing the division of “research” labour, action research avoids the frequent error of the traditional methods that consider the “people concerned” as a passive “reservoir of information” incapable of analysing their own situation and finding solutions to their problems.

The interested parties fix a common goal, the methodological approach and the long term measures, and carry out exemplary actions as early as the planning phase, which serves as a trial of future cooperation. Responsibility and decision-making which, in the traditional project structures, are in the hands of third parties, donors, experts and public institutions, are here the remit of the beneficiaries of the measures of encouragement.

The support provided by the outside is limited to advice and accompaniment when the artisans develop independent activities and to support when they strive to organise themselves. It mobilises the initiative at the base and in the end makes itself superfluous.

For the concrete procedure of participatory planning in the field this means:

- ◆ Renouncing a fixed programme a priori not revisable, the entire sketch of the measures of encouragement should first be constituted from discussions in common with the interlocutors;
  - ◆ Encouragement structures must be developed, allowing continuous communication between the interested parties;
  - ◆ The separation into interpellator should be avoided; frank, structured meetings should allow a dialogue situation;
  - ◆ Support for the proposals and actions of the artisans should favour the availability for collaboration on the part of both parties and make the formulation of a long term programme useful.
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## Action research

### *Action research as an intervention method*

In social science, particularly in sociology, action research refers to a particular methodology approach that raises fundamental interrogations inherent to these disciplines, concerning the position of the researcher with respect to the subject of study (social relations) and the field of investigation, the possibility for the social sciences of consciously participating in a process of social change without abdicating their scientific stature and objectivity, and lastly the possibility for social players to take part in drawing up a theory of their practises.

Intervention in such a complex fabric as a situation of economic, social, cultural and medical fragility is a difficult and sensitive business.

It is also difficult to document and spread the intervention methods developed in the field.

Action research meets these two requirements.

A first characteristic of action research is that it is drawn up in close relation with the beneficiaries, who become partners.

Action research has no target audience, but partners with whom to reflect, act, transform, discover and move beyond... Involving them closely is a condition that is both scientific and ethical when it is a question of working towards enhanced quality of life for a certain number of children and families.

Action research produces notions of a type that are theoretical and can be broadly applied.

The action project is coupled with a concern for research. By this permanent dialectic between action in the field and research, the analysis concerns both problem and causes, the process generated by the intervention and the effects produced. The reciprocal interaction between researchers and milieu allow the mechanism to apprehend the phenomenon systemically and gain a better understanding of it.

A further characteristic of action research is to aim to take into account the greatest possible number of parameters of situations.

In child behaviour for example, this implies taking into account the medical, psychological, maternal behaviours, etc. The challenge of action research is to own this multi-dimensionality.

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**Participatory action research (PAR)** is an extraordinary tool for a group if they succeed in using it properly, accompanied by a facilitator who has learnt to “disappear”, “fade away” to allow total freedom of initiative to the children or young people in a difficult situation. The group leader becomes a real facilitator.

In the title of PAR, there are three words:

- ◆ **Research:** this means the group will gather data, identify problems, identify the cause of one of the problems, and analyse.
  - ◆ **Action:** the group will formulate and implement an action that will allow it to act on one or other cause with human, material or financial resources.
  - ◆ **Participatory:** this approach is applied in its entirety by the group itself. The facilitator simply accompanies the group by transmitting to it the tools for research and action.
- 

**Even though the methods** of action research were originally applied by scientists and were essentially meant to be at the service of science (which meant science acquired a social dimension), the fact remains that from the outset the research situation presented striking similarities with the situation confronting the volunteer/peace worker daily. In both cases, a person belonging to another social category, and often even a different culture, finds himself in front of a group, with which they want or have to cooperate to help the members become aware of certain states of affairs and modify their behaviour. Also, what could be more natural than wanting to compare the methodology adopted by one group or the other and to draw the salient lessons?

Action research places in the hands of development professionals participatory methods, focused on the process of planning, implementing and evaluating the support measures, which is useful for cooperation for development. In fact, action research methods facilitate the identification and analysis of problems by the people and groups concerned, that they support in the search for solutions and in the planning of appropriate measures, and that they encourage to act independently in compliance with the plans drawn up by them.

### ***Link between theory and practice***

By removing the division of labour between “those conducting the research and those who are the subject of the research”, action research avoids the frequent error of the traditional methods of research and planning that consider the “people and groups concerned” as a passive “reservoir of information” incapable of analysing their own situation and of finding solutions to their problems.

This sharing of effort in the research process triggers the raising of awareness which produces concrete consequences on both sides. The consultant, taking account of the divergent interests present, draws the appropriate consequences regarding the formalising, processing and presentation of the information obtained and concerning the continuance of the ongoing experimentation process. The beneficiaries, on the other hand, modify their behaviour and implement actions they hope to take advantage of. Thus, both stakeholders benefit from the action research. Thanks to the supervision of an external facilitator, awareness is raised within the group of beneficiaries, leading them to review and modify their behaviour; as for the consultant, they have access to information they could not obtain in any other way.

For the concrete procedure of participatory planning in the field this means:

- ◆ Renouncing the idea of a pre-defined and non-revisable programme; the global conception of the support measures should emerge from the general discussion involving all the stakeholders;

- ◆ Setting up mechanisms favouring permanent communication between all the stakeholders;
- ◆ Avoiding opposition between ‘interviewers’ and ‘interviewees’; conducting unstructured interviews likely to generate a dialogue situation;
- ◆ Supporting proposals and actions of the artisans with a view to verifying whether the parties’ desire to cooperate materialises in practice, and formulating a programme to promote it in the long term.

### ***Action research and organisation advice***

Organisational development, which was perfected in the western industrialised countries by sociologists specialising in organisation, was subsequently refined by its users and is proposed by specialist consultants, is manifestly related to action research. Organisational development strives to solve the problems identified at the level of the structure and the functioning of the organisation by motivating the people who live or work there and helping them to formulate proposed solutions themselves, or at least to find appropriate solutions in common with the specialists.

This strategy starts from the principle that the people living and working within an organisation are better placed than anyone else to know the formal and above all informal structures of operation and communication, and that they are therefore able to find more appropriate and more realistic solutions than other people. The hypothesis is also backed up by the fact that this circle of people should be interested in the reforms, and more particularly the ones that effectively represent an improvement compared to the status quo that existed before, because these are the people who in fact suffer the backlash of failures.

The analogies with action research are striking and show that the methods used are not only applicable at micro-level, that is to say, to individuals (for example, farmers, artisans, women, citizens, the inhab-

itants of neighbourhoods) and their groups, in whom they should raise awareness and give the desire for emancipation and poverty attenuation, but also to relatively wealthy individuals and groups at micro-, meso- and macro-levels.

### ***Advantages and problems of action research***

#### ADVANTAGES

Action research methods lend themselves particularly well to starting off the development process and maintaining it, which can be explained by the following reasons:

The beneficiaries become aware of their own situation and understand the reasons that contributed to it.

The beneficiaries learn which techniques to use to solve problems they can also apply to other domains of life and work.

It is not the outside experts but the beneficiaries of the measures themselves who draw the lessons from their experiences and their errors; since they are the ones who suffer the consequences of their errors, they feel more accountable for their acts.

As a general rule, the beneficiaries begin by broaching a problem that is oppressing them and, by trying to resolve it, they are faced with a great number of other problems, mastery of which requires the use of strategies in different sectors: such a step favours the organic development of an “integrated” approach.

The beneficiaries almost automatically take into account the socio-cultural environment and the constellation of the political power struggles from which they themselves originate: sustainable solutions are found in this way, without the external project staff being obliged to understand perfectly the socio-cultural factors in play.

Given that the solutions sought generally profit a group or an occupational category and not only isolated individuals, action research measures generally have an impact of broad scope and are cost effective.

The beneficiaries defining goals, methodology and actions, and performing activities in the (open) orientation phases, serve to test the

cooperation and are therefore important for deciding on the configuration to be given to the “implementation phase”.

Unlike the traditional planning methods in which the target groups are, in the best cases, associated with the project through more or less legitimate representatives and in which the latter must submit to a structure imposed from the outside (situation of a seminar, programme directives, discussion dominated by “experts” and conducted in a foreign language), participatory planning methods present the advantage of maintaining the beneficiaries (as a group) in their usual living and working context. In this way, they can define their own intentions and formulate their proposals within the framework of a discussion spread out over time. The fact that the discussion is conducted in their living context and their usual language reinforces the position of the groups vis-à-vis the experts and the representatives of public institutions which, either unconsciously or intentionally but under cover, always defend their interests when they apply their own reasoning.

#### PROBLEMS

Experience of projects acquired over the past few years shows that the beneficiaries are not always ready to accept at the outset the conditions related to the measures for supporting self-promotion (a specific contribution and participation on the part of the beneficiaries themselves, on the one hand, and the temporary nature of support measures, on the other ), in particular when faced with the external support of a project and they have already adopted a “dependent mindset” within the framework of previous projects.

Consequently, during training and facilitation operations it is appropriate to make sure the short term successes gained within the framework of the project activities are not overestimated and that each individual measure is considered in the light of its impact on building the beneficiaries’ capacity for self-promotion. Promotional measures can be carried out to the satisfaction of the beneficiaries without being part of a perspective of sustainability and contributing to increasing their inde-

pendence. Such measures can favour the establishing of a dependency mentality (for example, funds granted repeatedly to the same group without capitalisation carried out over the same period for a given duration); these aspects should be given, more consideration by the project personnel. In a promotion strategy geared towards action research, the criteria and conditions of the support provided must, for this reason precisely, be drawn up by the project and be clearly demonstrated to the beneficiaries.

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**Scientific approach:** ensure consistency and rigour through the research questions or issues, analysis of the situation, definition of the problem, critical analysis of the sources and identification of the reference or theoretical framework, formulation of the assumptions or of the research goals.

Choice of an approach to a model: important characteristics of the quantitative and qualitative methods and action research models.

Quotation, treatment and analysis: fundamental concepts (hypothesis-goal, variable control(s), plans, sampling in qualitative research and instrumentation in quantitative research).

Analysis of contents.

Principle of testing assumptions (classic and non-parametric approaches), interpretation of the most common statistics techniques.

Computer tools for processing the data.

Presentation and discussion of the results.

Problems of epistemology and ethical questions.

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## Daily team practices

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Putting the practice into words (praxis)

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Elucidation, theorisation of the practice = praxeology

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## Definition of action research

The name itself encapsulates the definition. Simultaneous social intervention and analysis of such action.

There is a subtle nuance between praxeology and action research:

- ◆ the very name of the former means “logos on practice” therefore a sequence in which the praxis comes first and the analysis second.
- ◆ the form of the second suggests more a simultaneity: the researcher-actor instigates a new dynamic which will be both research *and* action.

Example: this difference can be observed at two moments in the “life” of a researcher who studies for a higher education diploma in social work. Following this path, a university master’s degree is earned through the praxeology of an occupation or volunteer activity. The student does not follow the usual purely academic path through university but seeks, in the different sciences, keys for decoding the issues at stake and the relevance of action in praxis. It is therefore a praxeological phase.

This student who has acquired some mastery of the research approach can then undertake post-graduate work, while at the same time remaining active professionally. If there is a common field between their professional practice and the lines of research and keys for reading of the laboratory, they may set up action research. In this situation, there is continuous two-way feedback between practice and theory....

To understand why this is important, let us think back to the story of the 7 “doctors” - sociologist, anthropologist, psycho-sociologist, psychologist, ethnologist, psychoanalyst and linguist around a table talking about: “The virtual team: players, documents and software. Goals and resources of a vocabulary control project at the service of the players in the virtual group.”

Something shall incontrovertibly emerge from this. But after how long?



It has been noted in multi-disciplinary meetings, even with a facilitator, that it is very difficult to “progress” because each person:

- ◆ is enclosed in their own conceptual world,
  - ◆ must make a huge effort to enter the conceptual world of the other,
  - ◆ wonders: “How do I begin?”
- 

**With the concern** for detail of action research, by cultivating an often neglected value of research: **creativity**.

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## **Action research**

Action research is a method that allows you, starting from local data gathered in close proximity to the players, to arrange actions, mobilise the existing potentials and revitalise social action. This approach enables the production of qualitative and/or quantitative information — a diagnostic — in order to respond to the issues at stake and the dynamic trends in local life, even though the existing data is lacking. It permits a better appreciation of the problems and, simultaneously, to find answers faster by raising the awareness of the local players to innovative work methods. Around a project defined with the asker (local authority, club, neighbourhood team), it is a case of implementing the process of shared analysis, combining the scientific approach to the experience and the knowledge of the field players (an organization, a neighbourhood, a town, etc.).

The methodology references used are from sociology, anthropology or ethnography, and can be completed by other approaches (epidemiology, statistics, etc.), methods of the community action type, or methods known as Rapid Assessment and Response (RAR) for the gathering and short term production of indicators taking into account qualitative and subjective factors.

Work groups bringing together the different partners (social workers and health professionals, volunteers, population, etc.) are constituted.

They enable a comparison of the data previously gathered with the personal experiences of the players, then to locate the sensitive points, lacks, failures in the field of hygiene and social work. From this surface of exchanges and reflection proposals, responses and projects can emerge. The mediation of the intervener creates a space for dialogue and develops a mobilisation around themes that run crosswise to those that normally organise the action skills. The player-partners are totally involved in the action research. This type of approach often leads to the networking of people who are informed and prepared to pursue reflection and action. The cooperation between participants from the public or private sector, territorial institutions or citizens is a source of emulation where each player can participate in defining collective goals. It is always a question of arriving at useful proposals, that is to say that can be appropriated by the players who made the request (advocacy, scenarios, strategies, recommendations, definition of reference frameworks), without “sticking” to the original expectations.

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### **Participatory Action Research (PAR)**

The participatory action research (PAR) method rejects the academic monopoly on the production of knowledge. It also calls upon grassroots knowledge. It is also fervently against the Newtonian and positivist-instrumentalist notion of arm's length knowledge (the subject facing the subject of their knowledge). Connecting research, participation and action.

The PAR method implies the acceptance that everyone knows what is going on around them and that this knowledge constitutes a force for change. Respecting this reality is the foundation of this new way of conceiving of knowledge production. It connects, as has been repeatedly emphasised here, social research and intervention.

### ***The history of PAR***

Research is intrinsically human. From time immemorial, people have “sought”, for example, food and an appropriate place to bury their dead. People have always had a corpus of knowledge for adapting to their environment. The creation of universities and laboratories is recent. This led to formal, expert science with its incontestable learning outcomes. But this formal science tends to be opposed to informal, popular science.

The division between experts and population we note today in social intervention in the South as in the North finds its origin in this formal and often arrogant conception of the dominant knowledge, that of the “expert”.

#### CARDIJN–MORENO–LEWIN–FREIRE

The reaction against the monopolisation of knowledge began in the West as early as the late 19th century, in particular with Joseph Cardijn, founder of the Young Christian Workers (YCW) movement in Brussels and initiator of the “see, judge, act” method . By this slogan, the YCW claimed, under the impetus of Cardinal Cardijn, its ability to think and found its action on this thought.

Moreno, the father of the psycho-drama or socio-drama invented the notion of “Aktionsforschung” (action research) as early as 1913, when working as a doctor with prostitutes in Vienna (Austria).

The person considered to be the father of action research is Kurt Lewin, who had initiated a method with young people “which starts wherever the customer is”. He invited the young people to analyse their own situation. He wanted to avoid the break between the production of knowledge and the “subjects” of this knowledge. He wanted, on the contrary, to integrate people as players into the analysis that would end up affecting them. The fundamental goal of the action-research-action-research goal spiral is democratisation.

The ideology of community development combines with the notion of diagnostic/awareness raising.

Then Paulo Freire in Latin America developed his conscientization method: empowering players because they are competent.

In the late 1960s, there was a growing rebellion against academic knowledge, in particular in Germany by research called “Aktivierende Befragung” (activating survey). It was a question, for example, of going door to door in the neighbourhoods to start a conversation the aim of which was to invite people to reflect. Thus, an agent said “it seems the neighbourhood youth club is causing problems because there has been vandalism. What do you think?”. Once the conversations have been summarised, they are presented to the people in the neighbourhood, by block of houses. This survey leads to a joint action.

ORLANDO FALS-BORDA-ANISUR RAHMAN-BUDD HALL

The strongest criticism came in the seventies from militant academics from the South up in arms against the elitist, imported, ethnocentric aspect of western knowledge. Other epistemologies were proposed, in particular by Orlando Fals-Borda (Colombia), Mohammed Anisur Rahman (Bangladesh) and Budd Hall (a Canadian working in Tanzania). (Refer to Fals-Borda and Rahman Action and knowledge. Breaking the monopoly with P.A.R., Apex Press, N.Y. 1991). Budd Hall coined the phrase Participatory Action Research (P.A.R.) when working to associate the Ujamaa villagers of Tanzania with his action research.

### ***Putting P.A.R. into practice.***

In English, this method is called Participatory Action Research (PAR). Rajesh Tandon (India) and Vio Grossi (Chile) are important proponents of the method. People also speak of “action anthropology”, “dialogical research” and “participatory rural appraisal” (Robert Chambers and Parmesh Shah). Some even say “guerrilla research”!

In French, Emmanuel Ndione (Senegal) and his team at Enda Graf stand out by the depth and accuracy of their writing on the subject, which is, of course, inspired by their praxis. (See, on this subject, by Ndione “*La recherche-action-formation, un miroir du savoir paysan*”

in Cultures et Développement – Quid Pro Quo no. 8/9, p. 10 and by the same author “*Dynamique urbaine d’une société en grappe. Un cas : Dakar*”, Enda, Dakar. See also by the same author: “*Les projets comme méthode de recherche*”, Cultures et développement – Quid Pro Quo no. 12, p. 6 and “La recherche-action”, idem, p. 10.)

The French speak of “recherche-action”,  
“consciousness-raising enquiry” (Michel Séguier),  
“sociology intervention” (Alain Touraine)  
or “institutional intervention” (La Passade & Rémy).

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## Lapassade

The typologies of participant observation with its various degrees of involvement are traversed by a permanent question which has not, to date, received a fully satisfactory answer: how to reconcile the methodological necessity of involvement in the life of a group or institution with the detachment necessary for the occupation of sociologist? How to avoid going native?

This question, naturally, is no longer posed in the case of “full” participation through “conversion”, which assumes the total immersion through which one becomes a fully-fledged member. But, apart from this extreme case, the question remains posed, and it has its place in all the ethnography manuals.

The necessity of keeping a certain distance— which is, moreover, inevitable —, is constantly mentioned, perhaps to enhance methodological credibility. We must not forget on this subject that the exponents of the ethnographic tradition had to face criticism from other sociologists, who presented themselves as the only researchers capable of giving a credible assurance of scientific rigour. Placed on the defensive, the ethnographers had to position themselves on the same level of scientific legitimacy and riposte in the same terms. In 1958 Howard Becker spoke of “verification of the hypotheses” according to the central model of positivist sociology. It was only in 1967 that Glaser and Strauss founded

the independence of an ethnographic approach which produces its hypotheses on the fly. (Glaser and Strauss 1967)

The opposition and the tension between “participation” and “distance”, finds another source in the ethnographic tradition of Chicago.

At the beginning of the century, many university sociology students in Chicago were also social workers or were preparing to become so. Like teachers doing research who prepare a doctoral thesis on their institutional practice, they had to do a spell in total immersion in the situations they were living, in particular with young marginal people —, they had to take a turn at “observing”. Their past or current practice became a subject of research. The young marginals they took care of were no longer solely the subject of social work. By accessing the role of researcher which was new to them, they had to achieve “distance” from their initial, and not professional, position of full “participation”, immersion in their “field” which had first been their “territory” of intervention: the street. The theoretical debate on “participation and detachment” would therefore be the academic transposition of a research problematic of action research (research based on social work).

### ***Participant observation and action research.***

In the work entitled *Fieldwork*, Buford Junker (1960) wrote: “Fieldwork as it is practiced occasionally or routinely in education, social work and in other enterprises concerning human relations is characterised by the fact that it is not concerned to contribute to knowledge” (that is to say by the fundamental research that aims to produce pure knowledge), its direct target being, on the contrary to “change people, or situations, or both”. A little further on Junker adds: “In this book we are going to deal only with fieldwork as it relates to social science, that is to say with the job consisting in observing, recording and reporting the behaviour of people in the contemporary situation without the intention of changing them or of changing the situations they find themselves in... fieldwork defined in this way is concerned entirely by the advancement of knowledge in the social sciences”.

Junker, as we can see, rigorously separates ethnography and action research. We find an opposite position in a more recent work, devoted to qualitative research methods (Deslauriers 1987), a work in which one of the authors, André Fortin, affirms that “since the sixties” we have been talking about participant observation in a context of action research, committed sociology or social work.

Further on, the same author emphasises “the difference between traditional participant observation” (that of Junker?) in which the distribution of the results of the research “is academic only” and action research, where, thanks to a more popular distribution, in particular in the milieu concerned, we hope to have an influence on the course of things”. In other words, the main aim of the participant observation approach is the constitution of interactive knowledge: knowledge that is given as feedback to members of a social group; it becomes an instrument of change.

It is interesting to note lastly the closeness between participant observation and action research in the work W. F. Whyte published towards the end of a long career under the title: *Learning from the field* (Whyte 1985). Chapter ten of this work is devoted to the description of three “types of applied action research” arranged in increasing order of the involvement of the researcher. The description is based on situations of action research in which the author was often the principal facilitator (he uses in this respect the French notion of “animation sociale”). ...

In the course of a career spanning half a century, Whyte probably devoted more time to action research with participant observation than to participant observation as understood in the more traditional sense, that is to say by immersion in the milieu as he practiced it at the beginning of his career, (between 1936 and 1940, among the young people on the “street corner”). But as his name has remained associated especially with the publication of his major early work, *Street Corner Society*, we forget the other aspect of his career. But is this really a different aspect? Not necessarily: in the 1985 book, Whyte recalls he went to survey a poor Italian neighbourhood of Boston because he was a reform-

ist. He wanted to change society — as did all the pioneers of sociological ethnography at the beginning of the Chicago School.

This relationship between participant ethnography and action research constitutes a problem that has been little studied. It is not mentioned, in general, in the manuals of qualitative sociology. It is nonetheless one of the fundamental problems of fieldwork today.

*<http://www.ai.univ--paris8.fr/corpus/lapassade/ethngr1.htm#2>*

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**So-called “action research” groups** can be characterised by four fundamental missions:

- ◆ draw up and test innovative teaching methods;
  - ◆ contribute to the ongoing training of the members of the group;
  - ◆ draft proposals for training around the themes being worked on;
  - ◆ produce documents that can constitute a contribution for the teacher, both in their relation to the discipline they teach, as on the field of their teaching practice.
- 

**Thus, four major categories of intervention project** can be identified according to the goals pursued:

1. research-intervention: resolve problems of intervention
  2. research-development: develop intervention tools
  3. action research: implement changes or innovation
  4. analysis-reflection: perfect occupational skills
-



## Action research

From the monograph of Robert Mayer and Francine Ouellet:

*Méthodologie de recherche pour les intervenants sociaux*; Montréal, published by Gaëtan Morin, 537 pages; chapter 2 “*La recherche-action*”, pages 101–153.

### *The process*

1. This is a long term approach and not an intermittent intervention;
2. It is undertaken in collaboration with real groups, integrated into a context, and not with groups composed of socially isolated individuals;
3. The participants discuss and negotiate the purpose, goals and orientations of the research;
4. The problem issues and research goals are not defined according to predefined theories or assumptions (even though the intervention is based on a theoretical framework) whether it is a question of confirming or refuting, but depend on the necessities of a concrete social situation and practice;
5. The data gathered in the course of the work has no value or meaning in itself; it is interesting only as an element in a process of social change and, in this sense, the subject of the action research is a social situation taken as a whole;
6. The researcher abandons (provisionally at least) the role of outside observer they usually adopt — therefore the social and physical detachment from the people constituting the subject of the research — in favour of a participant attitude, from empathetic observation to direct interaction with a view to real cooperation, and instigating peer to peer relationships with the other partners (which does not exclude critical detachment!).

### ***This method***

1. is a collective approach incorporating both a research strategy and an action strategy;
2. is realised by a multidisciplinary team within which the researchers and the players are committed to a relationship that is no longer 'researcher-research subject' but one of cooperation and collusion;
3. is centred on a concrete situation which poses a problem, inserted in real social relations and related to an action of social change;
4. aims to produce better knowledge of the conditions and results of the action experimented to extract lessons that can be generalised;
5. demands the intellectual and personal commitment of each participant, openness to criticism and calling into question, and the capacity of each individual to change their conceptions, practice and interpersonal relations depending on the development of the action research.

### ***The stages are***

1. preparatory phase and the establishing of the relations between the participants;
  2. formulation of the research problem;
  3. planning of a project;
  4. realisation of the project and the gathering of the data;
  5. presentation and analysis of the results.
  6. drafting of a research report and its distribution;
  7. assessment and return to action.
-

## Network

For a network to operate:

- ◆ integrate the notion of quality in acknowledging its missions and limits.
- ◆ ensure awareness raising by the partners of the network organisation and their participation in running it.
- ◆ eliminate problems of competition by transforming them into potential partnerships by getting to know and recognising the other.

The tools of the network are:

- ◆ knowing what we want to work on and how?
- ◆ being capable of examining needs and the quantity on hand from every angle in terms of response in a given sector (geographic or technical proximity).

The network operates through facilitation which could:

- ◆ Run a resource centre
- ◆ Exchange know-how
- ◆ Provide joint interdisciplinary training
- ◆ Propose diagnostic assessments
- ◆ Propose action research in the field of work we're interested in.

And lastly, for networks to be more than wishful thinking, the institutions and their administrations should show an example by drafting joint texts and signing local conventions enabling social players to integrate these new forms of professional practices. Lastly and above all, the person concerned should be an actor in the project which is devised around and for them.

*<http://perso.wanadoo.fr/ance.org/hireseau.html>*

# Participatory Action Research

## Module 1: Systems that Learn

By Jacques M. Chevalier and Daniel J. Buckles\*



*Creating an action-learning system*

### Planning, Inquiry, Evaluation (PIE)

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**Purpose** To create a learning system that balances and integrates planning, evaluation and inquiry.

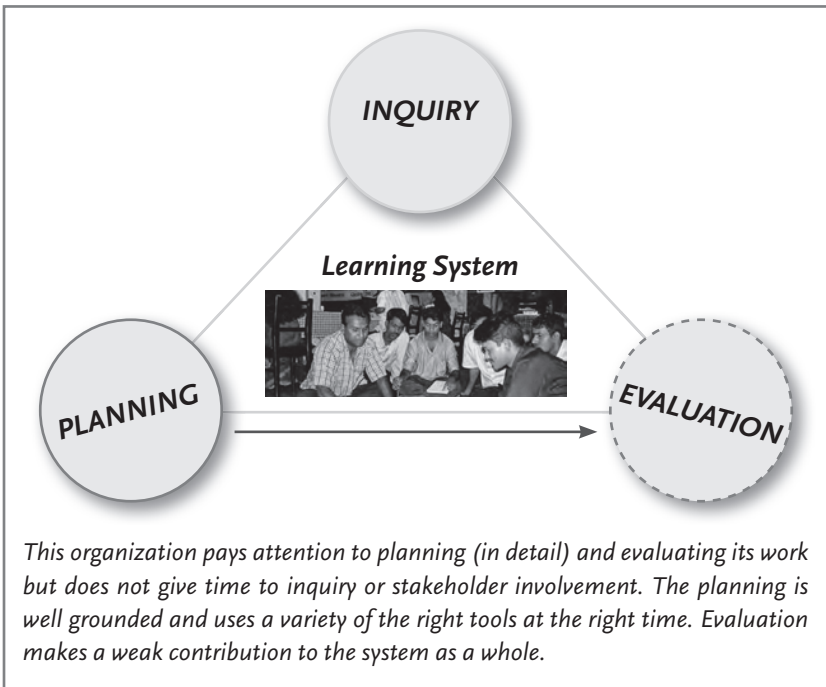
**Planning** (P) creates logical schemes for doing things to achieve goals with appropriate inputs. **Inquiry** (I) examines and explains facts and situations, using the appropriate tools. **Evaluation** (E) assesses results or outcomes against goals, using well-defined criteria and indicators of progress. A **learning system** combines all three processes. It also **grounds** them in meaningful action, mobilizes stakeholder **engagement** and applies a wide range of tools at the proper **time** and **scaled** to the right level of detail.

\* see [www.participatoryactionresearch.net](http://www.participatoryactionresearch.net)

**Step 1:** Define a key project or program and list **major** planning, evaluation and inquiry activities.

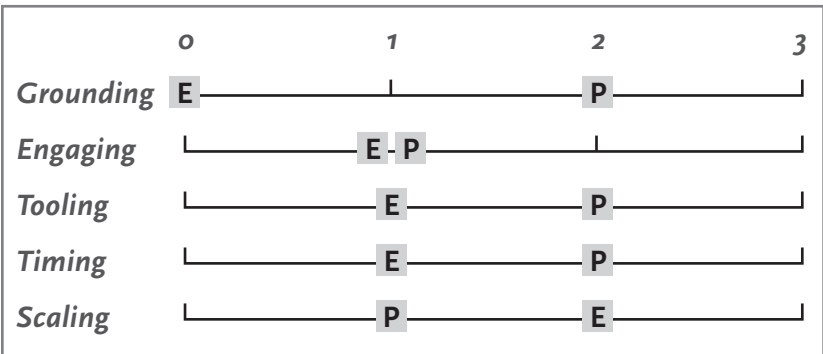
**Step 2:** Assess and compare the relative **weight** or **importance** given to planning, evaluation and inquiry over a specified time. Draw a triangle to represent PIE components in each corner, and add **circles** to indicate components that play a significant role in the project or program. Adjust the size and density of the circle to reflect the relative weight or level of effort dedicated to each component.

**Step 3:** If more than one component plays a significant role, assess the extent to which each component **contributes** to the other(s). Does the planning (P) build on the collection and examination of relevant



facts (I) and lessons learned about results or outcomes of the past (E)? Is the evaluation (E) well integrated into ongoing plans (P) and reflect an adequate understanding of relevant facts and experience (I)? Is the inquiry (I) well informed by existing plans and evaluation findings (P, E)? Draw **arrows** to indicate which component contributes to another. Adjust the thickness of the arrow to reflect the importance of the contribution.

**Step 4:** Rate each component on five criteria, starting with the extent to which each component is **grounded** in meaningful action. A rating of 3 would indicate that the component strongly informs action and is strongly informed by actions meaningful in the life of the organization. A rating of 0 indicates that the component has little or no impact or significance. Also rate the extent to which each component **engages** stakeholders and mediates differences through dialogue, using a scale of 0 to 3 (where 3 represents the highest rating). Using the same scale, rate three other criteria: the extent to which each component uses a range of **tools**, at the right **time** and **scaled** to the right level of detail.



**Step 5:** Review the PIE profile and discuss how satisfactory it is. Decide where **more effort** is needed and why. A flexible learning system that continuously balances and integrates PIE may be particularly important in complex situations.

## Action, Research, Training (ART)

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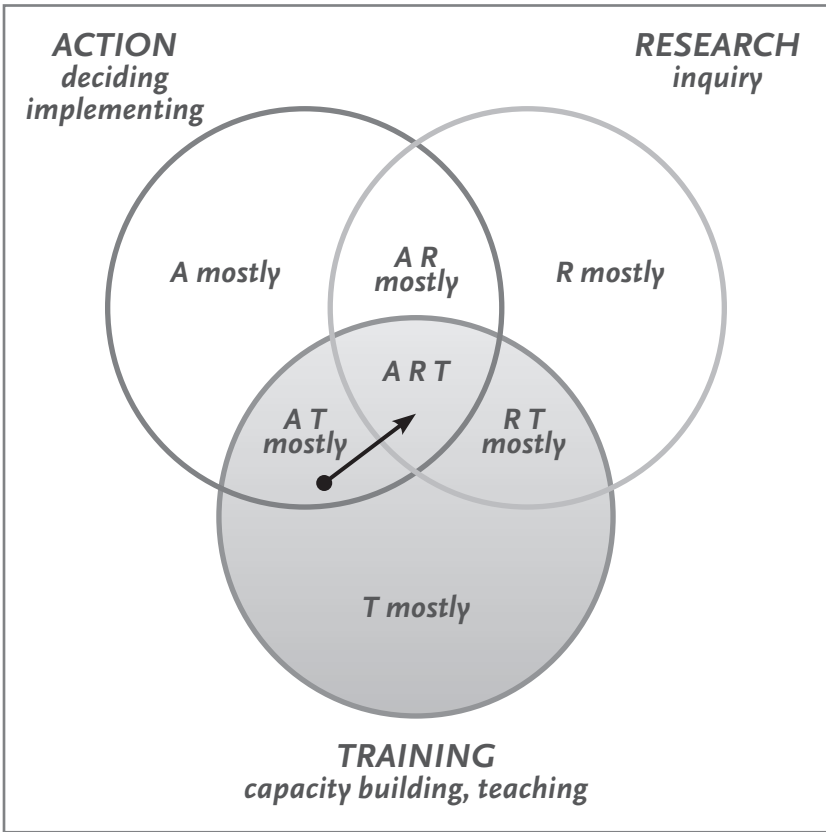
**Purpose** To assess the current and desired balance and integration of three components within a learning system: 1) actions, including deciding, planning and doing things to achieve concrete goals; 2) research or inquiry, consisting of data collection and analysis; and 3) training or teaching, involving capacity-building events and strategies.

**Step 1:** Define a key project, program or institution and list major actions, research and/or training activities of the previous six months to a year.

**Step 2:** Assess and compare the relative **weight** or **importance** given to action, research and training over the specified time. Draw a **Venn Diagram** representing the three ART components (Action, Research, Training) and place one mark in the intersecting circles that best reflects the existing ART profile.

**Step 3:** If the profile includes more than one component, assess the extent to which each component **contributes** to the other(s). For instance, if the profile combines R and T mostly, are the results of the research used in the teaching activities, and is the teaching useful to the research? Use a code or symbol between each component (one way, thin or or thick arrows, for instance) to indicate the **level of interaction** among the components of the resulting ART profile.

**Step 4:** Review the ART profile and discuss how satisfactory it is. Decide where **more effort** is needed and why, and place a mark in the Venn Diagram to show what the profile should be. Draw an arrow from the current profile to the ideal profile (see example). Explore what can be done to achieve this **profile**, and define the first steps in the desired direction.



**TIPS**

- ◆ Use the ART Venn Diagram to survey and **compare** the views that different participants have of the same project, program or institution, and what the profile should look like.
- ◆ Use *Activity Dynamics* to measure the **level of interaction** among the components in the ART profile and strengthen their overall integration.





## Order and Chaos

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**Purpose** To decide on the planning approach needed by answering two questions: what are the chances of achieving project or program goals, and how certain or confident are people that the information and knowledge they have (about the conditions and factors affecting the project or program) is complete and reliable?

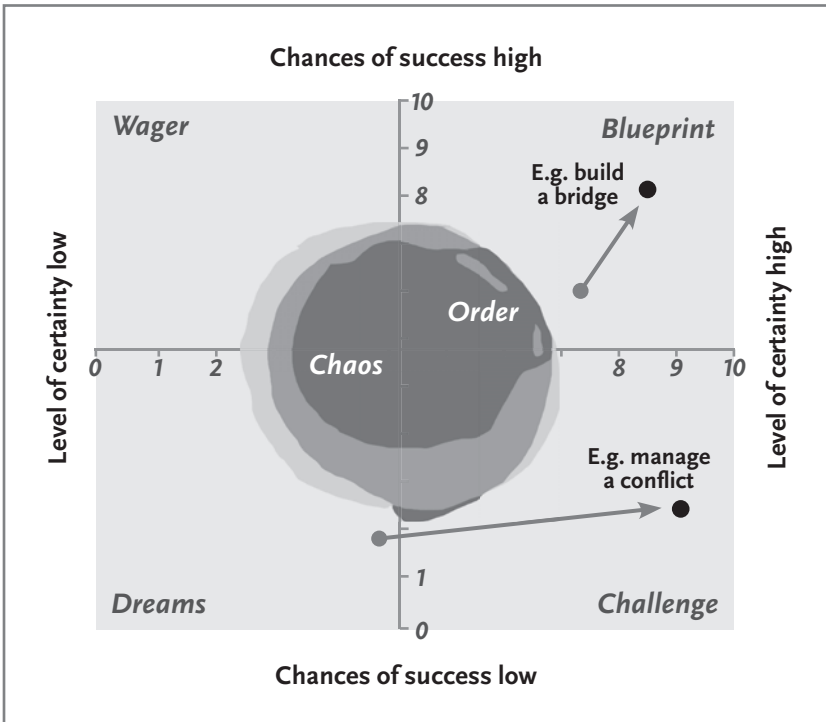
**Step 1:** Define the project or program and review goals and plans to achieve them.

**Step 2:** Prepare a graph (on the wall or the floor) by drawing a vertical line that crosses a horizontal line of equal length. Discuss and plot on the vertical line the chances of achieving the project or program goals, using a scale of 0 to 10. A value of 10 would indicate that the current conditions are very favorable and the chances of achieving the goals very high. A value of 0 would show the opposite (the chances of success are very low).

**Step 3:** Discuss and plot on the horizontal line the level of confidence that people have in the information and knowledge they possess about the current conditions and factors affecting the project or program. How **certain** are they that this information and knowledge is complete and reliable? A value of 10 would indicate that knowledge about the conditions and factors affecting the project or program is detailed or informed by extensive experience. A value of 0 would show the opposite.

**Step 4:** Mark where the values from the two lines meet and label or place a drawing representing the project or program at this intersection.

**Step 5:** Use the same graph to plot the chances of success and the level of certainty needed and that should be **aimed for** before going on with



the project or program. Mark the place where the two plotted values meet and draw an **arrow** from the mark showing the current situation to the mark showing the situation aimed for. Discuss ways to **increase your knowledge** about the conditions and factors affecting the project or program or to modify the current conditions and **improve chances for achieving goals**.

**ADAPT**

- ◆ The same graph can be used to **survey and compare** different views of the same project or program. Another option is to identify **several objectives or activities** that are part of the project or program, and then use the graph to plot the chances of success and the level of cer-

tainty for each objective or activity. Different planning approaches may be needed, depending on their location in the graph.

- ◆ Review the four quadrants and discuss how these call for different ways to develop a project or program plan (for example, as a **blueprint** that calls for Result-Based Management, or as a **challenge**, a **wager** or a **dream**—a plan defined as a working hypothesis, to be tested using *Process Design*). Projects or programs in the 'Chaos' quadrants may benefit from planning approaches that incorporate working hypotheses, further inquiry and continuous planning as ways to accommodate uncertainty and complexity.

## Process Mapping

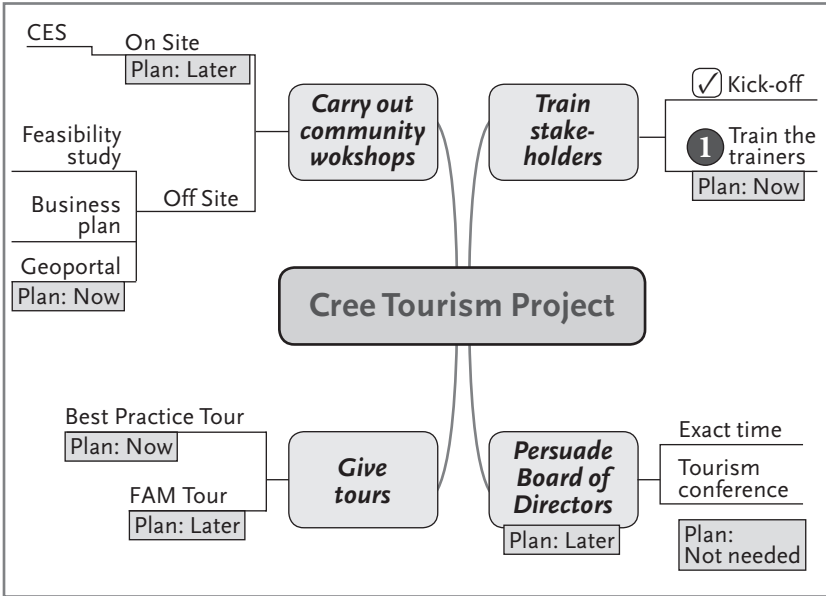
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**Purpose** To plan action and inquiry at the right time and at the appropriate level of detail, and to adjust the two in light of unforeseen events and new knowledge.

**Step 1:** Define the project and discuss the overall **goals** and expected results. List all current and/or proposed project **activities** on cards using keywords (one activity per card). Use concrete action verbs to describe an activity or set of activities, instead of words for objectives or topics. For example, use 'raise funds' instead of 'resources', or 'lobby' instead of 'policy impact'. To clarify the distinction between activities and goals, use one side of each card to describe the activity and the other side to describe the corresponding goal.

**Step 2:** Organize the activity cards into **sets and subsets** based on principles of similarity among activities (see *Free List and Pile Sort*). Create a label or **title** for each set and for each subset.

**Step 3:** Create a process map, beginning with a title card, drawing or object representing the project placed in the center or in the upper left



corner of the map. Then add the sets and subsets of activity cards to the map, creating branches and sub-branches as in a tree or a shrub.

**Step 4:** Decide which activity or set of activities is ready to plan in some detail and whether this can be done immediately. Focus detailed planning on **immediate activities** (four months and sooner, for instance).

Some activities may not require formal planning or can be **planned at al later date** (as in medical practice), where **more information** is available about the results of prior activities, the actions of stakeholders, or key conditions that need to be met. Discuss these information gaps and add new inquiry or **fact-finding** activities to the process map, as needed.

**Step 5:** Write the details on the back of those activity cards that require immediate planning, including the start and finish **dates**, **people** involved (and their roles), material **resources** needed (equipment, budget),

the **information** required, **methods** to be used and the expected **results** or outcomes. Create and use a visual code to highlight in the map some of these details or any other aspect such as levels of **priority** or the **stage** of completion for each activity. Provide the optimal level of planning detail, and decide whether further planning is needed. Use tape to fasten cards in place, thereby creating an overall picture of the process map.

**Step 6:** If needed, compile the planning details from sets and subsets of activity cards to produce a **table**. In Column 1, list project activities (some or all of all of them). Use other columns to record information for each activity on **who does what, why, when and how**. Alternatively, use ‘mind-mapping’ software to arrange and track the data.

**Step 7:** When new or more detailed plans are made, **modify** the table and process map.

### **ADAPT**

- ◆ Arrange the activities in the order or **sequence** of implementation (see *Critical Path*). Place those activities that are ongoing throughout the project or not scheduled in a separate area of the process map.
- ◆ Include in the process map references to major **activities** carried out **before or following** the planning period. This encourages recognition that planning occurs ‘in the middle’ of complex situations involving other stakeholder contributions that have a prior history and no clear ending.
- ◆ When working on complex projects, you can divide participants into **groups**, ask each group to use *Process Mapping* to map out their own set of activities, and then adjust group plans through discussions and negotiations between all groups.



## COMPARATIVE FEATURES

*Process Mapping* acknowledges the fact that some activities require formal, immediate and detailed planning while others don't. As a visual tool, it helps people discuss project plans and, while doing so, **see the forest from the trees**. These features are generally absent in planning methods that use mostly text, tables and spreadsheets. In addition, *Process Mapping* has the advantage of accommodating a **plurality of stakeholder interests** and potential outcomes around a common set of **actions**. To achieve this, the method uses program or project activities (**goal-oriented actions**) as the point of entry instead of the general and specific objectives (**action-oriented goals**) emphasized in conventional planning methods such as Result-Based Management. Action-oriented goals (such as promoting democratic governance in the management of forest resources in a certain region) tend to be abstract and overly ambitious compared to goal-oriented actions (for example, setting up a multi-stakeholder platform to co-manage a region's forest resources more fairly). Goal-oriented actions are more grounded and closer to the day-to-day language that people use to make plans and assess their progress. As in other methods, the goals built into the actions can still be defined and negotiated collaboratively.

*Putting it all together*

## Process Design

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Process Design is a flexible systems approach to planning and managing an inquiry process grounded in action. It is the starting point leading to the selection of tools and methods deemed useful to the inquiry. The following guidelines help with the practical grounding of tools for collaborative inquiry in the context of an action-learning process. They show how to plan an inquiry at the right time and at the appropriate level of detail, and inform action plans in light of unforeseen events and new information.

**Step 1: Consider the general context**

Define the general context where the inquiry needs to be planned in detail.



**Step 2: Define the planning situation**

To ground the inquiry in a real setting, it is useful to distinguish three scenarios based on varying levels of uncertainty and complexity (see *Order and Chaos*).

**PARK EXAMPLE**

**Step 1: Context**

The National Park receives 2.7 million visits per year. The Park has various means to identify client needs such as open house sessions for park users, suggestion boxes and logbooks, the Infocentre, the Visitor Centre, e-mails, contacts with park staff, volunteers and tourist guides, and attendance at community meetings. With the emergence of new media (e-mail, blogs, etc.), an increasing number of users are voicing complaints about the park's management methods and services delivered by a private contractor. Responding to complaints draws considerable time and scarce resources away from other park management activities. The Park team wishes to review its past responses to service-related complaints and reduce the volume. It also wants to shift its approach from a client service focus to building solid partnerships with park stakeholders.

**Step 2: Planning situation**

The Park team hopes to address the increasing volume of user complaints by analyzing the problem and designing solutions that reflect a good understanding of the situation. Given the many views and

interests involved, the process should be planned progressively, in close collaboration with key stakeholders, starting with those concerned by recreational services. Once the key problem and objectives are clearly defined, a workshop will be held with team members and the Park contractor to assess the situation, identify priorities and develop a plan of action and process map. The plan should include the creation of a Park Dialogue platform, a process that will involve several steps, to be **planned in due time**. If successful, the same process should be extended to other Park services and stakeholder groups.

## SCENARIO 1: CONTINUOUS PLANNING

The first scenario involves complex, multi-stakeholder situations rife with **uncertainty**. Planning in this scenario recognizes that general and specific goals may **interact and evolve**, subject to negotiations, compromise and change over time. Planning needs to occur in the middle of an ongoing process where the results of prior activities, the performance of key factors and stakeholder interventions or responses cannot be fully predicted. Information and knowledge are incomplete, links between causes and effects are not linear or straightforward, and chains of actions, partners and results are complex.

For this kind of situation, characterized by some degree of chaos, use the tool *Process Mapping* to make project or program plans with varying and optimal levels of detail and time frames. Create and mobilize knowledge and engage people along the way by formulating working hypotheses and integrating multiple, flexible inquiries or diagnostic assessments into the plans, as needed to inform actions and the planning process. Keep in mind that some activities do not need a formal



inquiry either because there is no pressing need, the results are clear, or they can be monitored through **day-to-day tracking** (using informal exchanges, for instance).

## SCENARIO 2: PLAN FIRST, IMPLEMENT AFTER

Some situations are **predictable** enough to plan most activities in advance and with considerable detail, followed by implementation. Planning in this relatively orderly situation assumes that there is a coherent set of objectives shared by all stakeholders, and that these objectives are clearly achievable with a well defined set of inputs (time, resources, people). Under these conditions, use the tool *Process Mapping* and selected tools (from this handbook or from other sources) to do four things in sequence:

- 1 **assess** the initial situation;
- 2 make **detailed activity plans** based on assessments of the initial situation and the logical link between planned activities and expected results;
- 3 **monitor** the ongoing results of implementation against the initial set of observations or findings;
- 4 **evaluate** the final results against initial objectives using relevant criteria, indicators or progress markers (see *Scoring Tips*). The initial situation can also be re-examined in hindsight, to produce effects of Socratic learning (such as ‘Now we know we knew’ or ‘Now we know we didn’t know’; see *The Socratic Wheel*).

Results-Based Management may also be appropriate in this scenario. Planning in detail well in advance relies on high levels of information, consensus and confidence regarding the chances of achieving particular goals. As with complex scenarios, do not plan more inquiries than needed.

## SCENARIO 3: SINGLE EVENT

Some situations are so short-lived, uncertain or pressing only immediate events can be planned. Comprehensive long-term planning tools are not really needed or useful. Use Process Design and the appropriate inquiry tools (from this handbook or other sources) to facilitate a **single or one-off event**, and plan follow-up actions in detail based on the results. If the focus is on a single event or activity, go immediately to Step 3.

<b>FOR EACH INQUIRY READY TO BE DESIGNED</b>		
<b>1</b>	<b>Consider the general context</b>	
<b>2</b>	<b>Consider the planning situation</b> <ul style="list-style-type: none"> <li>◆ <i>Continuous</i> planning?</li> <li>◆ <i>Plan first</i>, implement after?</li> <li>◆ Plan at the <i>right time</i>?</li> </ul>	See Order and Chaos.
<b>3</b>	<b>Identify prior decisions</b> <ul style="list-style-type: none"> <li>◆ <i>Who will</i> participate and in what capacity?</li> <li>◆ <i>Profiles</i> of participants?</li> <li>◆ <i>Time</i> available?</li> <li>◆ Prior <i>knowledge</i> and decisions?</li> <li>◆ <i>Role(s)</i> of facilitator(s)?</li> </ul>	<i>Use PAR techniques to make these decisions and define the purpose of the inquiry, if necessary.</i>
<b>4</b>	<b>Define the purpose of the inquiry</b> <ul style="list-style-type: none"> <li>◆ <i>Type</i>: upstream, midstream or downstream assessment?</li> <li>◆ <i>Goal</i>: for learning-planning, accounting and/or storytelling?</li> <li>◆ <i>Scope</i>: amount of information, analysis and participation needed? See <i>Validation</i>.</li> <li>◆ <i>Results</i>: expected output(s), outcome(s) and impact?</li> </ul>	

<b>5</b>	<b>Plan the inquiry</b>	
<b>5.1</b>	Identify/clarify <b>main questions</b> and put them in sequential order	<i>Use input-output reasoning. See Active Listening.</i>
<b>5.2</b>	<b>Select and sequence tools</b>	<i>Use input-output reasoning. Vary the tools. Include pre-post testing, if needed. Combine PAR techniques with other methods and facilitation procedures.</i>
<b>5.3</b>	Design <b>all steps</b> for each tool (PAR + other methods + facilitation) <b>DECIDE</b> <ul style="list-style-type: none"> <li>◆ <b>Instructions:</b> detailed procedures?</li> <li>◆ <b>Level:</b> how simple or advanced? SMART indicators required?</li> <li>◆ <b>Technology:</b> hands-on or computer-based?</li> <li>◆ <b>Analysis and narration:</b> right mix/sequence of formal analysis (tables, graphs), description and storytelling?</li> <li>◆ <b>Subgroups:</b> based on what criteria? Homogeneous or mixed? Full or strategic and progressive participation?</li> <li>◆ <b>Explanation:</b> brief or debrief people on the technique?</li> </ul>	<i>Based on prior decisions, event purpose, expected results, level of social and scientific validation needed and familiarity with the tool.</i>
<b>5.4</b>	Identify <b>remaining decisions</b> <ul style="list-style-type: none"> <li>◆ <b>Who</b> will participate and in what capacity?</li> <li>◆ <b>Profiles</b> of participants?</li> <li>◆ <b>Time</b> available?</li> <li>◆ Prior <b>knowledge</b> and decisions?</li> <li>◆ <b>Role(s)</b> of facilitator(s)?</li> </ul>	<i>Use PAR techniques to make these decisions and define the purpose of the inquiry, if necessary.</i>
<b>6</b>	<b>Design the documentation, testing and capacity building process</b>	

**GO BACK AND FORTH BETWEEN STEPS,  
UNTIL THE DESIGN MEETS ITS PURPOSE.**

# Action research, gender and development

By *Hélène Fromont\**

## The combination for change

Territorial approaches in France and Senegal express the transition from training-action to training through action research and from a specific women-based approach to a gender approach. To analyse these in this contribution, we draw on a heterogeneous body of experience, composed of local, regional and international practices, the non-profit sector and adult training at the Paris Cooperative College and Paris 3 Sorbonne-Nouvelle University. The latter have, in partnership with the ASTER-International network, accompanied groups of adults in training from the perspective of crossing gender and local development, for the Cooperative College to build a cursus to a CIL (*Certificat d'Initiative locale* – Local Initiative Certificate), that could lead to a university diploma in social practice (DHEPS, *Diplôme des hautes études en pratiques sociales*).

A detour by way of autobiography gives a reminder of the intersection between personal life and collective practices. A conceptual clarification precedes a presentation of several experiences, drawing on a variety of documents (reports, assessments, capitalisations, articles):

\* Source: <http://www.repaira.fr/recherche-action-genre-et-developpement/>,  
26 September 2013

- ◆ Training of women through training-action (Picardy);
- ◆ Training of women through action research (Picardy);
- ◆ Cursus of a mixed group through action research in a VAE (Validation of learning from experience) intersection of gender and territory (Burgundy);
- ◆ Two-dimensional experience in Senegal: the training of a mixed group with a gender & development option and the creation of a *Maison des femmes* (Women's Centre).

From these reminders, we analyse the transition from training-action to training through action research and from a woman-centred approach to a gender one. The gender approach and the action research method are both global and cross-cutting, and break with the conventional analyses. We examine how, when they intersect, the “breach” effect is strengthened. They then converge to:

- ◆ create the conditions for social change;
- ◆ renew development practices;
- ◆ identify new organisational practices;
- ◆ trigger a transition from simple, linear thought to complex thought patterns.

## A practice anchored in a personal story

Trained as much by popular education movements as by university, I am convinced that utopia can be practiced through commitment for social change aimed at greater equality and social justice.

(...)

The 1990s were marked by three key moments: meeting with the Cooperative College and the work of Henri Desroche, back to university, creation of ASTER (*Actrices Sociales des territoires Européens Ruraux*) as

a training organisation combining territorial development and male/female equality and as an international network<sup>1</sup>.

(...)

Being politically militant is not necessarily incompatible with research, but can, on the contrary, stimulate it, knowing that “our knowledge activity shall always appear suspect to those who are annoyed by our questioning of the order of things”.

In the context of social change, economic globalisation and financial crisis, the concept of development is increasingly showing its limits and negative effects. The gender approach and action research, while they are articulated to a philosophical and political vision, converge on several points and can give rise to new practices and other conceptions of development.

## Action research and gender approach, for another development

The UN concept of development is too often reduced to progress and growth, which imposes a uniform model reinforced in the context of globalisation and provokes a reaction of sometimes violent isolationisms. This contributes to the exclusion of social groups, regions, countries, or even continents (Semblat, 1997).

Edgar Morin (1984, p. 449) noted the failures of development and “the development of the development crisis”, he speaks of “maldevelopment”,

<sup>1</sup> ASTER-International is both a laboratory for social experimentation, an observatory of practices and a network, which implements a “pedagogy of action” and a “pedagogy of internationalism at the service of local development”. The first gives precedence to the territory, the group, the project. The second is based on reciprocity, the sharing of experience, inter-territorial cooperation. From the perspective of social change, ASTER develops specific dimensions: “Women – Territory – Local development – Gender and development – Network – International”.

ASTER intends to be a place for the exchange of practices, experience and skills, for the circulation of people and ideas, but also action, reflexion and analysis. The network brings together members and partners from different continents: Africa (Burkina Faso, Morocco, DRC, Senegal), America (Canada) and Europe.

Intervention methods: training engineering, action research, guidance and monitoring of territorial projects, international seminars, production of teaching manuals, studies and research papers.

and identifies development at the service of a “model of humanity that is masculine, adult, bourgeois and white” leading to a vision of man “that is humanistic/rationalistic, one-dimensional and poor and based on an astonishingly limited mechanistic/economist idea of society”. He underlines the role played by the excluded minorities, while “juvenile, feminine, multi-ethnic, multiracial ferments are at work”. Others call into question the very logic of development, and speak of post-development, after-development or anti-development (Bergeron, 1992).

While the specialists note the failures of development, for several decades the players in the field have been seeking solutions and so adjectives have been added to the term “development”; after “local development” comes “social development” then “sustainable development”. The first adjective evokes territorial exclusion, the second that of social categories, the third envisages the globality of the social, cultural, environmental and economic dimensions of a development that preserves the future of the planet and the forthcoming generations.

Faced with the limits and negative effects of development, the call to the mobilisation of all the resources, in particular those of women, leads us to pose questions relative to the equality of women and men. Thus the concept of gender is increasingly promoted, but it is not easy to grasp when translated into French from the English word *gender*, which still arouses resistance, incomprehension and act as a stumbling block in the French speaking world and especially in France. Gender “was conceived first of all in English as opposed to sex: gender was to sex what culture is to nature” (Fassin, 2009, p. 29), introduced by British sociologist Anne Oakley, officially recognised after the World Conference of Women in Beijing in 1995, now integrated into public policies, international cooperation programmes, UN agencies... For feminist researchers it’s a condensed way of naming “social relations between the sexes”, unequal relations which cannot be modified by the specific “women” approach alone, women often perceived as beneficiaries and not as actors of their lives, approached only in their reproductive roles and not in the complexity of their family, economic, social and political roles. Gender

therefore aims not only at women, but at the relations between women and men, as opposed to an essentialist approach, that of a given feminine or masculine nature, it recognises the importance of the construction of identity through culture and education, and therefore the possible deconstructions and reconstructions.

(...)

For the gender approach to produce change, it should not be stuck on like an afterthought but should be integrated into the organisations, programmes, training courses and institutions ...

The concept of empowerment is inseparable from gender: "Concept forged by DAWN (Development Alternatives with Women for a New Era), inspired by the theory of oppression and the "pedagogy of the oppressed" by Paolo Freire, it had all the force of the concept of emancipation. It has often become synonymous with autonomy, the social and economic powers being no longer questioned".<sup>2</sup>

While the gender approach can be a tool for change, action research also aims to improve or even change a situation that is initially unsatisfactory for those in it, a situation that poses a problem: "action research recognises that the problem arises from a group in crisis in a given context" (Barbier, 1996, p. 35) and that they are the most capable, if accompanied, to identify, analyse and change.

Change is a major concept of action research shared by Henri Desroche, André Morin, René Barbier, Hugues Dionne ... "action research aims to change attitudes, practices, situations, conditions, products, discourse..." (Barbier, 1996, p. 75 in reference to Ardoino). For André Morin "change" is one of the five major concepts of integral action research on the same level as: "contract", "participation", "discourse" and "action" (Morin André, 1992).

No action research without collective participation which means everyone is a stakeholder and "really concerned personally by the experience" and "acting" (Barbier, 1996, p. 48). In which case it is emancipa-

<sup>2</sup> Marie-Lise Semblat, workshop sheet, "Gender and development" Colloquium, organised by CRDTM, Lille, 30-31 March 2007.



tory: “the group of practitioners become responsible as they organise themselves... compared to the institutional, bureaucratic habits of coercion” (Barbier, 1996, p. 39). Action research becomes a “science of praxis”, praxis as “... a process of transformation of the world by the political person, as one of its associated elements” (Barbier, 1996, p. 39).

Lastly, action research takes us into the field of complexity, “no action research without a fair assessment of the complexity of the real” for René Barbier who invites us to “enter into a complex thought process” and who makes complexity a “crossroads-notion” to which he accords much importance (1996, pp. 59–65).

(...)

For the analysis of experience, we shall therefore remember the major concepts action research and the gender approach largely share: those of change, participation, emancipation, cross-over and complexity.

Training, a component of the “primordial practices”  
of groups of women

We have identified, in the context of globalisation and development crisis, new women’s’ groups in the rural milieu. Their practices described as “primordial” translate the emergence of a renewed expression of feminism called “territorial feminism” (Semblat, 1997), an expression coined in respect of the term “territorial syndicalism” used by Félix Guattari to describe the realities of union territories in Chile (Guattari 1992).

Territorialised training has been identified, centred on the project, taking into account personal and territorial development. Innovative, it is always experimental, for adapted to local realities (Semblat, 1997).

(...)

Three action research training initiatives, in Picardy, Bourgogne and Senegal, with the simultaneous creation of a Women’s Centre in Casamance will be built around a local operator: Social Centre in Picardy, rural foyer in Burgundy, NGO in Senegal, in partnership with ASTER-International.

The three trainings led to a CIL from a path formalised by the Cooperative College (300 h including 200 of collective training and 100 of individual work). It takes place *in situ* in a territorial approach crossed with an individual approach and the collective dimension, each individual conducting a project presented through a monograph with a view to obtaining the Local Initiative Certificate.

## From training-action to training through action research

Towards an integrated “gender and development” approach in Senegal

The “Bridges” project – *“Passerelles. Formation-Expérimentation. Pour une pédagogie de l'international au service du développement local et de l'approche genre”* (Bridges. Training-experimentation. Towards an international pedagogy at the service of local development and the gender approach) co-devised by ASTER and the Senegalese NGO OFAD/Nafoore, tried to reconcile an integrated gender approach within the framework of a training course leading to a qualification and a diploma with a specific approach for women through the creation of a Women's Centre. Action research concerns both dimensions, training and conception, then running a Women's Centre and the gender & development approach was given preference. This experience therefore combines action research, gender and development. In addition, once more, to the expression of participation, change and emancipation, yet again the cross-over and complexity result from the combination of these three components, action research, gender and development.

The name of the project Bridges<sup>3</sup> expresses the articulation of intersecting goals, of the de-partitioning of target groups and North/South cooperation. It seeks from the outset to:

- ◆ Jointly boost the skills of the local players in France and Senegal in terms of formulating and conducting projects;

<sup>3</sup> *Passerelles Formation-Expérimentation. Pour une pédagogie de l'international au service du développement local et de l'approche de genre*, file compiled jointly by ASTER-International and OFAD/NAFOORE from 2001.

- ◆ Contribute to social change and attenuating poverty through the emancipation and citizen involvement of the women of the Kolda region and their access to greater autonomy (in particular financial), support for the creation of a rural resource centre/Women's Centre;
- ◆ Contribute to developing connections and cooperation, suitable training that validates learning as a prolongation of the actions already carried out between the partners<sup>4</sup>.

### Aster and OFAD/NAFOORE partnership

OFAD/NAFOORE, member of ASTER since 1997, shares with the members of the network a vision of development that gives preference to the autonomy of the population, participatory democracy, improving living conditions and boosting international solidarity<sup>5</sup>. The exchanges are placed under the sign of reciprocity, from the perspective of “international pedagogics at the service of local development incorporating gender” implemented by the network.

The NGO is present in the village of Bagadadji (population 500, Kolda region) which, despite a strong potential, is, according to the poverty reduction strategy plan (PRSP), one of the poorest in Senegal: 53% of households are living below the poverty line. To the precariousness of the population's living conditions, the high rate of illiteracy (72%) and malnutrition, are added poor management of natural resources, the inexistence of suitable training structures, the lack of health infrastructure in the vicinity, and the low level of organisation of the social players. The Casamance crisis has affected part of the region, expressed by the abandoning of arable fields for fear of landmines and the mass exodus of young people.

4 Excerpts from the dossier Passerelles, 2002.

5 Memorandum of understanding signed in 1999 by the two organisations.

Since 1997, the local NGO has been working to empower the population through education and training, the development of income-generating initiatives, based on endogenous funding tools, to improve the conditions of access to health care (literacy groups, the creation of 20 basic community schools, microcredit, the combat against genital mutilation, etc.).

The project emerged from a dual observation, the necessity of professionalising and qualifying the agents of the local NGO and the situation of the women in the zone who remain the most vulnerable, for often victims of socio-cultural burdens and unsuitable development policies. While they are often organised in groups, they are not involved in decisions and have trouble gaining access to the most basic rights: health, education and finance<sup>6</sup>.

Bridges takes into account the complexity of the issues at stake for the various local players by aiming at women, the professionals of the NGO, their partners and all the local players. The international launch seminar in November 2005 expressed this complexity, by bringing together the 30 liaisons from the Women's Centres, 33 trainees (men and women, agents of the local NGOs) and a delegation of 17 members of ASTER from Europe and Quebec, not forgetting women's groups from The Gambia and Guinea Bissau.<sup>7</sup>

From there, for a period of just over three years, the two dimensions of the project were supported, for the training by ASTER and the Cooperative College (in partnership with Paris 3 University), for the Women's Centre, by ASTER, the action research workshops regularly bringing together the CIL group and the liaisons from the Women's Centre.

6 From the dossier *Passerelles*, 2002.

7 Plenary sessions were held on themes such as "societal mutations" in Senegal, "rural development", "G & D approach", "international cooperation", interventions translated into Pulaar and Mandingue. Activities adapted to the different groups (research groups for CIL trainees, workshops for liaisons and field visits for partners from other countries) ended with plenary session at the end of the day to present the findings, translated into the languages concerned.

## Gender mainstreaming in training

Training the agents of the local NGOs of the Kolda region for the CIL, “gender & development” option, led some to the DHEPS/Master 1 programme at Paris 3, Sorbonne-Nouvelle University. Male-female equality issues integrated transversally into theme-based seminars were run by Senegalese speakers from Dakar or Kolda, on education, health, literacy, rural development or changes in society ... methodology seminars and action research workshops run *in situ* led the group, supported by local tutors, to produce monographs (for 29 out of 33) then, for 8 out of 11 selected for the DHEPS/master 1, research dissertations)<sup>8</sup>, related directly to professional practices: the fight against genital mutilations, basic community schools, schools displaced due to the conflict in Casamance, water management ...

A midway evaluation<sup>9</sup>, expressed the relevance of the project in relation to local needs. The training allowed people with field experience to have it recognised and approved. It meets an expectation of the development players and offers them the possibility of promotion and jobs with more responsibility<sup>10</sup>. Their project management skills are boosted thanks to a better analysis of the situation, greater facility in writing and better knowledge of the territory and the issues at stake there. The trainees acknowledge having acquired new work methods. They say they have mastered the concept of development and the different of types of development, have the tools to understand their role as development agents. Taking the gender approach into account has encouraged changes in professional and personal attitudes: “I no longer consider women as people who should only take care of children’s education or

8 Of eleven people registered at Paris 3 University, eight presented their thesis *in situ* in the premises of OFAD/NAFOORE in February 2009 before a jury chaired by Pierre-Marie Mesnier.

9 Realised by Miléna Zarev as part of her master's internship, sciences Po, Bordeaux, 2007.

10 One of them became President of the rural community and MP, another President of the Credit Mutuel bank in Senegal, a facilitator is now a member of the team of supervisors at the NGO, in charge of training.

housework, but as partners and actors of sustainable development” (testimony of a graduate).

## Women’s Centre

A workshop to analyse practices in October 2003, from among 90 people in charge of women’s groups, identified 30 women leaders who became liaisons of the Bagadadji Women’s Centre. The project was built from action-reflection sessions run by the coordinator of the Bridges project, activities changed from satisfying practical needs to strategic interests, a major gender approach<sup>11</sup>. Action-reflection remains faithful to the demands of change, participation and emancipation of action research, but with a lesser demand for scientific credibility:

*“Action-reflection, for example, does not require going through a phase of drawing up hypotheses. More empirical, it nonetheless remains rigorous enough to go into greater depth on the questions broached by the group. It also presupposes methodology support, and requires a clearly defined subject (meaning and limits). It introduces detachment without having the heaviness of research. One or other of the two procedures (which are updated through partnership workshops on research or action-reflection) are likely to lead to concrete action proposals, such as the facilitators were able to experience on many occasions in other places”<sup>12</sup>.*

The group is composed of exceptionally dynamic women, only a small number of whom can read and write. The sessions are held in Pulaar or Mandingue: “the women must validate the report if we want it to be a truly participatory process. To the extent that the vast majority of the women cannot read or write, it is important to use oral methods”<sup>13</sup>.

11 Which distinguishes between the satisfaction of basic needs and the issues of reinforcing power, access to independence and empowerment.

12 Municipality of Fontaine, DSU, working group on male/female equality, minutes of the meeting of 24 March 2005 run by ASTER: How to follow up on the work accomplished by the team over the past year?

13 Excerpt from Mission report of 25 May 2006 by Jocelyne Gendrin, project leader, ASTER-International.

ASTER-International accompanied the facilitation team of the Women's Centre from December 2005 – April 2009, formalising and regularly updating the plan of action then leaving a longer space between missions. The person in charge of the Women's Centre, Coumba Pam Koïta, then received the support of the facilitators from the NGO within which the Women's Centre found its rightful place<sup>14</sup>.

The Women's Centre completely integrated into the social fabric of the rural community of Bagadadji reaches, through the liaisons, 30 villages in Senegal, two villages in The Gambia and one in Guinea-Bissau, or a total of more than 1,300 women. It proposes a place for exchanges, information, training, awareness raising, innovation, support and project mentoring ... the liaisons who take part in the activities are responsible for disseminating them to the population of their village, organising training in the village groups, and assuring a role of observer of the living conditions of the village<sup>15</sup>. In doing so, they contribute to the continuity of a process of change and development.

While the first activities of the monthly groupings focused on traditional activities, income generating activities and information in women's priority domains, those of their reproductive roles (family health and education), the Women's Centre gradually moved towards more strategic missions and the organisational practices of the women became structured. The activities, traditional in the beginning (dyeing, soap making, hairdressing, dressmaking), evolved towards diversification.

For the first time, international women's day, usually organised by the associations and federations of groupings in Kolda, the regional capital, was initiated on 8 March 2007 by the Women's Centre. The rural women of the zone organised the event and prepared a list of grievances which they submitted to the sub-prefect of Dabo at the end of a march which pupils and teachers from the local college joined. This initia-

14 Management of this centre is under the responsibility of Coumba Pam Koïta, with the support of OFAD who wished to reinforce the role of the Women's Centre in its non-profit project, a new service was set up concerning micro-credits to allow women to start small businesses.

15 Excerpt from mission reports.

tive<sup>16</sup> had the effect of a breach and constituted a turning point towards greater recognition of the liaisons by their peers. It was also the expression of the empowerment of the women, having switched from activities essentially based on the satisfaction of practical needs to reflections on the place and rights of women.

With the support of the AIF (*Agence Internationale de la Francophonie*) activities more focussed on the realisation of strategic interests were started up: leadership training, workshop on violence against women, information sessions on rights. Rural women's empowerment, stance-taking and participation decisions were expressed in the municipal elections of March 2009 with the election of several liaisons to rural councils.

The Women's Centre favoured greater solidarity among women. Violence against women decreased, in particular because they became aware of their rights. Children's education has become a priority since the liaisons made it understood that enrolment was indispensable. The parents beat their children less since they know that they, too, have rights.

The liaisons say they share a very strong feeling of belonging to the Women's Centre reinforced by recognition from the outside; they find themselves respected by the women in their villages and have gained the confidence of the local authorities. They express themselves more than before and their words are taken into account, "the women have become open and curious. [...] A woman who has not been on the bench of a school<sup>17</sup> gives you ideas as if she had been to university" (the Imam of a village). The taboo practice of female excision has become the subject of information and discussion, thanks to the awareness-raising actions of the liaisons reinforcing the role of the NGO facilitators. On an economic level, thanks to the activities of the Women's Centre, women can contribute to household income and this attenuates poverty.

16 100 women marched from Bagadadji to the sub-prefecture of Dabo, preceded by the students from the college shouting: "stop forced marriage". Stop genital mutilation. Stop violence against women. The men who held responsibilities in the zone supported them by joining the group (Chairman of the village community, headmaster of the primary school, principal of Bagadadji college, village chief).

17 Which means she did not go to school.



## Bridges, an innovative project

The project and its two dimensions favoured a gender & development approach that facilitates the satisfying of needs (reproductive health, literacy, micro-credits, micro-projects, the environment) with a view to attenuating poverty, balancing the roles of men and women, and achieving the long term sustainable development of the micro-region.

Action research or action-reflection was crossed with the gender approach to meet the specific needs of women in a global and integrated dimension that articulates gender and development. This matches the double stakes of the gender & development approach, economic in mobilising all the resources and skills at the service of development and democratic in terms of justice and equality.

(...)

Action research leads to collective knowledge production, turning players into actors, thereby facilitating individual and collective empowerment. By incorporating the questioning and changing of social gender relations, gender pedagogics is under construction, like action research it is a school of emancipation, and questions social reality:

*“Working with the concept of gender creates a critical attitude to the social. Researchers, project managers and the basic organisations working with this gender perspective, in cooperation, are part of a project of social transformation”* (Verschuur Christine, Reysoo Fenneke, 2003).

The gender approach having become gender responsive pedagogy is then eminently political just as much as action research which is “always a political questioning in the etymological sense of ‘of, for, or relating to citizens” (Barbier, 1996, p. 75).

The participatory approaches of action research and the global, integrated gender approach are tools for change which can lead to renewed visions and development practices.

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