Knowledge from the Margins

An anthology from a global network on participatory practice and policy influence

Participate

Editors

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Credits

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Front cover – Working from behind the Wall (MEND 2013)

Inside cover – A woman shares her vision for development in the Egypt Ground Level Panel (CDS 2013)

Readers are encouraged to quote and reproduce material from *Knowledge from the Margins: An anthology from a global network on participatory practice and policy influence*. In return, IDS requests due acknowledgement.

Contents

Acronyms

AIDS Acquired Immune Deficiency Syndrome

ARVs Antiretrovirals

ADI Alzheimer's Disease International

CBOs Community based organisations

CPNRM Community Participation in Natural Resources Management

CPLG Community Participation in Local Governance

CSOs Civil society organisations

DCHC Delft Community Help Campaign

DRC Development Research Centre for Citizenship, Participation and Accountability

DST Digital storytelling

GCRN Ghana Community Radio Network

GLPs Ground Level Panels

HEPS Uganda: Acronym for Coalition for Health Promotion and Social Development

HIV Human Immunodeficiency Virus

HLP High Level Panel

IDS Institute of Development Studies

LAPV Latin American participatory video

LGBTQI Lesbian, Gay, Bisexual, Transgender, Queer, Questioning and Intersex

MDGs Millennium Development Goals

NGO Non-governmental organisation

OWPSEE OneWorld Platform for South East Europe Foundation

PRG Participatory Research Group

PV Participatory video

QWERTY The most common modern-day keyboard layout for Latin script

SLF Sustainable Livelihoods Foundation

TB Tuberculosis

UAM-X Universidad Autónoma Metropolitana Xochimilco

UN United Nations

UNDP United Nations Development Program

UNGA United Nations General Assembly

UNICEF United Nations Children's Fund

UNITAS National Union of Institutions for Social Work Action

Foreword

Robert Chambers

Participate is a unique tour de force. To my knowledge, there has never been anything quite like it. 18 organisations in over 30 countries including Ghana, South Africa, Kenya, Uganda, Bolivia, Philippines, India, Bangladesh, Egypt and Mexico, who were already working with diverse marginalised people, have come together to make their voices count on development policy.

Fourteen years earlier the 'Voices of the Poor' project was also participatory but its approach was more standardised. *Participate* in contrast has used many different verbal and visual approaches: participatory video, community radio, digital storytelling with creative writing, storyboarding and role-playing, participatory action inquiries, ground level panels, film documentary set in eight countries and an exhibition in New York. Those who have taken part and whose voices have been amplified are marginal in many ways – people with disabilities, the excluded and discriminated against, the chronically sick, sexual minorities and those living in extreme poverty in many contexts. *Participate* has become a celebration of diversity and as this critically reflective collection shows, the harvest of insights and experience for the future is rich. Significantly, the initiative continues as an active network of like-minded committed organisations.

This anthology is unusual for its pervasively critical and reflexive approach. This makes it more than ever an important source of learning – from what has worked and from what has not. *Participate* shows how much can be achieved quickly by networking knowledge

In Participate, participatory approaches enabled people living in poverty and marginalisation to express their aspirations for development

between organisations that are already engaged with marginalised people. It shows that participatory methodologies do not have to be standardised to be effective. It shows the power of visuals, stories and the personal for communication, and the importance of relationships. And what disturbingly hasn't worked is a stark challenge for the future.

The 27 members of the High Level Panel for planning post-2015 priorities were each given the opportunity of a brief immersion living with marginalised people. Not a single one took it up. This is despite, as the authors of this anthology point out, the extraordinary contrast between the uniformity of policymakers and the diversity of those who are marginalised. Policymakers appear to be disabled by a reverse isolation and marginalisation, one which has not been forced on them but the boundaries of which for whatever reasons they accept to live with.

Besides *Participate*, there are many other initiatives to influence the post-2015 agenda. Attribution belongs to none of these, but contribution can be clear with the shift from the Millennium Development Goals, with their incentives to reach those more accessible, to the new focus on the worst off. The post-2015 rhetoric starts with those who are most marginalised, excluded, disadvantaged: those whose voices and visual evidence are presented by *Participate*. There is a new agenda. For those who take part in *Participate*, the challenges and opportunities are to continue networking, to intensify their engagement with marginalised people, and to continue to set an example and share their experience. For the rest of us, it is to follow their example of commitment, engagement, critical reflection and learning.

I hope that the *Participate* initiative and this anthology will give others ideas of how the voices of those who are marginalised can be amplified. I hope it will provoke action to bring policymakers and people living in poverty together face-to-face. There is much to be done by many: *Participate* should not be a one-off, but should reinforce and inspire a broadening range of initiatives post-2015 to put those who are last first. This book is a start.

1 Knowledge from the margins

Collaboration is central to the participatory practice envisioned within Participate

1.1 Knowledge from the Margins and the *Participate* Process

Thea Shahrokh and Joanna Wheeler

What's this all about?

Welcome to the *Participate* anthology *Knowledge from the Margins*. This anthology is an account of the activities carried out by the Participatory Research Group (PRG) within the *Participate* initiative between 2012 and 2014, and also a reflection on the methods and processes created and utilised during that time. Our intention with this anthology is to share insights and lessons we have learned to help promote thought and discussion about how to use participatory approaches to influence policy at a variety of levels.

This anthology will draw on *Participate's* experience of:

- Applying, adapting and innovating participatory methods to promote the voices of participants in all stages of the research process

- Creating opportunities and spaces for including the perspectives articulated through the research where possible in the policymaking processes

- Embedding participatory approaches in local-to-global policymaking processes

Who this anthology is for

Whether you are an experienced research practitioner of participatory methods, a policymaker or development professional committed to participatory development, or a relative beginner exploring participatory processes for the first time, we hope that you will find this a useful and thought provoking resource. The intention in documenting and sharing these lessons is not to create a definitive how-to guide for using participatory methods and research to influence policy, nor to suggest that we have found all the answers. Rather, we hope that this anthology will help to open debate and prompt further reflection amongst those in solidarity with our aims. Within *Participate*, some members framed their work in terms of 'development' and some framed it in terms of other goals: democracy, social justice, gender equality, sustainability, and social inclusion, among others. This anthology is intended for those who are committed to working with people at the grass roots level in order to influence the decisions that affect their lives in order to contribute to more just and equal societies – this includes those working in the aid sector, and those working towards transformative social change at any level.

What *Participate* is

Participate is working to democratise the way in which development happens through participatory research to influence policy. The initiative was conceived in relation to the post-2015 development agenda, with an ambition to start with those who are most affected by policy decisions. *Participate* as a network brings together diverse organisations and movements committed to achieving this goal. To support this vision, the Institute of Development Studies (IDS) and Beyond 2015, a global campaign of civil society organisations, agreed on a collaboration aiming to influence the post-2015 development framework. [1]

At the core of *Participate* is a Participatory Research Group (PRG) of 18 organisations committed to bringing knowledge from the margins into decision-making at every level of society. PRG members are all independently funded and bring their ongoing research with people living in extreme poverty and marginalisation into the initiative, using diverse participatory methods, ranging from oral testimonies to theatre for development. Within the *Participate* network, participation is understood as contributing to citizenship, social justice and development as social change. The aims of the *Participate* network involve working to inform and transform policy and practice in development in order to:

- Bring perspectives of those in poverty into decision-making processes

- Embed participatory research in global policymaking

- Use research with the poorest as the basis for advocacy with decision-makers

- Ensure that marginalised people have a central role in holding decision-makers to account in the post-2015 process

- Generate knowledge, understanding and relationships for the global public good

Participate is grounded in lessons learned through the prior experience of PRG members and others. [2] During their time together, PRG members have built relationships with each other, and co-constructed their vision for *Participate* on the basis of their shared goals for participation as a central component of a transformative development agenda post-2015. After two years of intense work, *Participate's* members have produced 18 studies, field-tested new methodological tools and produced a global synthesis report which has had recognisable influence on the post-2015 debate.

Participate offers the rare opportunity to bring together experienced and emerging participatory practitioners from diverse places to work together within a specific, urgent and tremendously important

moment in global policymaking. The stakes are high; and so is the level of difficulty of what *Participate* aims to achieve.

The creation of a revised set of global goals for development is highly political, with diverse actors and complex interests involved. The consideration of 'whose knowledge counts' in decision-making is significantly biased towards a centrally driven UN-level process, which entails emphasis on certain forms of 'technical and expert' knowledge, and elite power-holders who are far removed from the realities of living in poverty. From the outset, PRG members have considered the deep and significant critiques of 'participation in development', particularly in relation to the absence of politics and power from understandings of participation and its potential co-option by, and legitimisation of, powerful actors. [3]

Although decision-making processes at the global level have promised new opportunities for those most marginalised to influence decisions, many have experienced these processes as extractive. As opposed to ongoing involvement, people are left feeling that their voices have been used for political ends which are not their own. This anthology is a reflection of how successful *Participate* has been in responding to these critiques and what further tensions and challenges emerged through the initiative.

The scale of the shifts required within the post-2015 process to meaningfully engage with the perspectives of people living in poverty and marginalisation mean that tensions such as these are a key background feature to the implementation of *Participate*. [4] Continued reflection and learning throughout the initiative has helped us to understand the complexity of this challenge, the time pressures attached and the constraints of what it required in practice. In turn, these reflective processes have also helped to ensure that we think very carefully about how we approach opportunities for engaging in the policy process. [5]

A global collaborative network for change

While potential for policy influence at the global level was always uncertain, other outcomes of the initiative have been much more within our reach. The opportunity to build a global network of practitioners and organisations specialising in participatory methods was seen as hugely exciting and offered a unique space for learning and innovation in participatory research. *Participate* set out to work as a collaborative global network in which the network members had direct involvement in the decision-making processes in as many aspects of the initiative as possible. While the initial proposal has been written by the co-directors of *Participate* at IDS, the shape of the network and its direction was guided by the members from the outset.

[1] Find out more about *Participate*'s relationship with IDS at: www.ids.ac.uk/project/participate-knowledge-from-the-margins-for-post-2015

and Beyond 2015 at: www.beyond2015.org/participatory-research-group

[2] See for example *Participate*'s review of attempts to broker a local-global interface (www.participate2015.org/publications/what-do-we-know-about-how-to-bring-the-perspectives-of-people-living-in-poverty-into-global-policy-making/).

[3] Read more about the 'Risks, Tensions and Lessons' in Contribution 1.3 of this anthology.

[4] Read more about tensions experienced within the *Participate* process in Contribution 1.3 Risks, Tensions and Lessons.

[5] The role of reflexivity in participatory practice is explained in Contribution 1.3 Risks, Tensions and Lessons.

Through research and action women in Mexico claim their leadership role in the community

Participate has sought to encourage peer learning and exchange around the use and evolution of participatory methods. This approach has been very important in terms of the basis for shared learning and common understanding of our purpose and the challenges we all face as participatory practitioners in different settings. For example, in digital storytelling (DST) training for the network in Abuja in 2013, representatives from seven PRG member organisations went through the process of learning a new approach together and supported one another in how to implement this approach in their own work.[6]

The network-wide workshop processes have also been crucial to this approach. The synthesis of participatory research is difficult under normal circumstances, and *Participate* faced a major challenge in how to synthesise the diverse work of 18 organisations into an accessible and coherent set of outputs that could speak to the post-2015 debate while still legitimately representing the original work. In response to this challenge, our report 'Work With Us' [7] was constructed in an iterative way through a peer-review based writeshop. During the writing process, which was led by IDS, there were more opportunities for feedback and validation of the draft and the key messages. In the end, this led to a publication that was broadly supported by the network, in spite of the massive challenges the network faced.

The governance structure of the network was another important aspect of how *Participate* functions. The composition of the steering group was discussed openly at the inception workshop, and membership of the steering group was open for any organisation in the network to put themselves forward. In addition, there were convenors for particular areas of work (Policy and Advocacy, Visual Methods, Immersions, and Synthesis), who were responsible for leading these areas.

Participate was fortunate to be able to draw on past experience of global collaborative networks, including the Development Research Centre for Citizenship and Accountability (DRC) which operated from 2000-2011. At the core of this approach was a commitment to participatory practices through which knowledge was co-generated in a collaborative and iterative way (Gaventa and Bivens 2011). [8] While the focus of the research was different, the DRC's principles of network building and knowledge co-generation were foundational to the conceptualisation of *Participate* and set the tone for the ways of working within the project. But it also faced unique challenges in terms of the breadth of the network membership, the ambition and scale of the aims of the network, the nature of the post-2015 policy process, and the very short timeframes involved. There have been some very important lessons learned about working collaboratively with a commitment to participatory research. This anthology will shed further light on these – and we invite you into the conversation about how to move forward.

[6] See 1.4 for Erika Lopez Franco's insight into the collaborative learning opportunities for participatory methods facilitated through *Participate*.

[7] See *Participate* global synthesis report 'Work With Us: How People and Organisations can Catalyse Sustainable Change' (www.participate2015.org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).

[8] Gaventa, J. and Bivens, F. (2011) *Co-Constructing Knowledge for Social Justice: Lessons from an International Research Collaboration. Social Justice and the University*, Knoxville: University of Tennessee.

What the anthology is and why we are doing it

The purpose of this anthology is to articulate and share the lessons that have been learned in *Participate* between 2012 and 2014. It is a reflection of the complexity of how all the elements of *Participate* fit together, the tensions created and the lessons learned in response. We hope you will find value in the particular insights contained within the individual contributions; but overall what this anthology offers is an attempt to distil what has emerged through a unique opportunity to collapse the distance between every day experiences of marginalisation and global decision-making.

This anthology is the product of an internal reflection process within *Participate*, including a workshop in November 2013 in which network members came together to discuss their experiences. It is made up of many distinct voices and we have tried to maintain those in this publication. There are different and at times divergent views on some of the key issues and challenges *Participate* faced. By putting these different perspectives together in the anthology, we hope to offer you, as the reader, some prompts for further thought about your own work.

We hope that this anthology will be the start of a conversation and not its conclusion.

Participatory approaches: innovating, experimenting and learning what works

In working towards *Participate*'s aim of democratising the post-2015 debate, we took the opportunity to innovate in participatory methods and approaches and to embed participatory research and knowledge into the development decision-making processes.

There are important questions in terms of how to maintain the integrity of people's voices, stories and contexts within a politically pressurised global policy process. Ensuring the legitimacy of the way in which knowledge, generated through participatory methods, is represented – and who the representatives should be – are significant and debatable challenges. [9]

To ensure that the research processes were valuable in and of themselves, irrespective of their ability to influence high-level policy, the network developed a shared understanding of what constitutes legitimate and ethical participatory research:

- The research is with those living in poverty or who are from marginal, vulnerable or excluded groups

- The research is not a one off. It is embedded in a longer-term relationship, or it will be the foundation for a longer-term relationship

- Participants will be centrally involved in identifying the key questions, and in making sense of the 'data', they won't only be participating in generating and collecting data

- Researchers will support participants to help ensure this involvement is meaningful, not tokenistic

- Participants will be invited to validate any findings, and have the ability to withdraw any of their contributions from the research

- Participants will be given feedback about what happens to their contributions and where possible what outcomes have emerged from the process

- Researchers will have an interest in critical reflection, documenting and sharing methodologies

Approaches we used and why

The research studies used a range of techniques. These included: participatory focus groups and multi-stakeholder meetings, participatory inquiry, action research, oral testimonies and story generation as a foundation for collective analysis, photo-digital stories, photovoice, drawing and essay writing competitions, participatory video, and immersions (living with households and joining in their lives). In some of the projects, people living in poverty were trained to be researchers themselves, using these participatory methods. For example, some projects chose to promote child-led research supported by adult facilitators, or engaged community and non-governmental organisation (NGO) peer researchers. We gave particular emphasis to visual approaches and to creating spaces for engaging the policy process on different terms – where the knowledge that emerged from participatory research could have influence.

Emphasis on visual participatory approaches

The initiative engaged a series of participatory visual processes using digital storytelling and film to portray development issues through the perspectives of those affected by poverty and marginalisation. These processes use multiple forms of creative media (images, film, audio, design, drawing, drama) in conjunction with participatory research processes to articulate, distil and communicate powerful messages. Through these approaches, participants learn the technological skills necessary to design, produce and create their own films and stories. These participatory processes also apply visual tools to drive, mediate and structure the engagement with participants enabling them to make sense of their lives and decide through exploration and deliberation what is important. [10]

[9] Engage with these challenges in more depth in Contributions 3.1 Linking Community Participatory Action Research to Global Policymaking: Lessons Learned and 3.3 Representation, Advocacy and Engagement Across Levels and Spaces: Reflections from Participatory Practice.

[10] Read reflections on the role of visual methods in *Participate* in Chapter 2 – Starting with People: Learning from Participatory Practice.

Transforming spaces for policy influencing

Participate developed a number of innovations in practice with the goal of collapsing the distance between the grassroots experience and global policymakers tasked with creating the post-2015 framework. In doing so, we hoped to move policymakers beyond a purely rational assessment of the research into a space where they built more connected relationships with people living in poverty and marginalisation:

- *Participate* developed an aggregated space in which these stories, images and words from many different contexts were brought together in a single physical location for a *Participate* exhibition. [11] The exhibition featured stories created by participants from collaborating research partners in the *Participate* networks. The installation aimed to create an immersive experience in which visitors could sense the overwhelming urgency of the issues being expressed by the various communities and groups.

- *Participate* partners hosted dynamic policy interactions between those living in poverty and those with political authority through Ground Level Panels (GLPs). [12] The GLP name was used to contrast the closed space of United Nations (UN) High Level Panel (HLP) which held significant sway in shaping the post-2015 agenda. GLPs brought together diverse participants from poor, marginal, displaced and indigenous communities.

- Led by Real Time, *Participate* produced a 20-minute documentary film to influence UN decision-making processes. The film drew stories together in order to powerfully communicate the participatory processes involved, and the importance of their contribution. [13]

Structure and flow of the anthology

Chapter 1 frames the anthology by explaining what *Participate* is, and what it has been doing. It also frames the concepts that informed how *Participate* works, including the relationship between participation, knowledge, and transformation. It includes personal reflections on the nature of the network. Finally, Chapter 1 provides an insight into the reflective process used to generate this anthology with a summary of the key insights and tensions that we identified as a result.

Chapter 2 focuses on innovation and critical reflection in participatory methodologies used in *Participate*. We focus on descriptions providing clear information for practitioners interested in using these tools in their own contexts. This chapter also offers a series of individual reflections by *Participate* researchers on particular methods and approaches.

Chapter 3 focuses on processes of policy change and the local to global interface. Each contribution reflects the individual and collective insights of researchers and organisations as they looked for the wider implications of their findings and their efforts to move these findings towards effectively informing policy. The chapter concludes with a reflection on how change happens through the *Participate* process.

The anthology ends with a short synthesis and reflection on the advances that the *Participate* initiative has contributed to the broader field of participatory practice. Such advances also open up new questions and challenges. In raising these questions, we point to ways forward for further learning and innovation in the field of participatory approaches and on the issue of policy influencing.

[11] Read Catherine Setchell's personal reflections on the 'Work With Us' exhibition in Contribution 2.2 Participatory Approaches and the Policy-Practice Interface.

Find out more about 'Work With Us: an Exhibition of Stories from People Living in Poverty and Marginalisation' online at: www.workwithus2015.org

[12] Read reflections on the GLPs from Natalie Newell and also from Danny Burns in Chapter 2 – Starting with People: Learning from Participatory Practice.

[13] Read more about the approach taken to producing the documentary film in Contribution 2.2 Participatory Approaches and the Policy-Practice Interface, and 3.2 The Politics of Policy Influencing.

[?] *An Editor's question will look like this and you'll find them throughout the contributions and chapters of this anthology.*

User's guide for the Anthology

Editor's questions: The contributions in this anthology share the reflections and learning of the *Participate* network members at a personal, organisational and collective level. We hope that the editors questions positioned throughout the contributions and chapters of the anthology will help you to continue this reflective journey, in relation to what you understand about *Participate*, but also from your own experience as a practitioner. These questions do not have a right or wrong answer, but emphasise the importance of engaging critically on the issues of participatory practice and policy influencing. [?]

Types of contributions in the anthology:

Framing papers: these papers have been written to contextualise the reader within the *Participate* journey.

Collective reflections: generated through a collaborative reflective process, these contributions are based on shared learning between *Participate* network members.

Individual narratives: contributions from *Participate* network members that share a personal reflection on a part of their experience within the initiative.

Conclusion: A forward looking piece that provides a synthesis of what we have learned through the *Participate* process so far, and what spaces this has opened up for the future.

Participate 2012

Collective visioning at the Participate inception workshop

1 Participatory Research Group convened and inception workshop held at IDS

1 See Map of the PRG on p.67

Engagement in the Monrovia meeting of the Post-2015 HLP

Early findings of an analysis and synthesis of past participatory research with people living in greatest poverty and marginalisation to inform post-2015 decision-making

1 Short film presenting the disconnect between a social housing project and indigenous people's realities and knowledge in Chiapas, Mexico, made by Real Time with accompaniment from UAM-X, Mexico

Start of the documentary film-making process to influence the post-2015 framework by Real Time

1 See film at www.participate2015.org/ 2013/02/18/a-house-without-dignity

Nigeria peer learning Digital Storytelling (DST) workshop with participants from six partners

Latin America participatory video (PV) Workshop: Sumando Voces in La Paz, Bolivia. Production of various films produced by partici- pating activists and NGO partners in the region.

Participatory engagement between residents from Nairobi's informal settlements and Kenya's High Level Panel member Betty Maina

Global learning dialogue between residents of informal settlements in Nairobi and Chennai

| September 2012 | October 2012 | November 2012 | December 2012 | January 2013 | February 2013 | March 2013 | April 2013 | May 2013 |

1 Participate started – Convened by the Institute of Development Studies (IDS) and the global civil society campaign Beyond 2015

Participate conveners identified on participatory visual methods, immersions through a Reality Check Approach; research synthesis and analysis and advocacy and policy influencing. Call for expressions of interest to the Participatory Research Group (PRG)

1 www.ids.ac.uk and www.beyond2015.org

Engagement in the first meeting of the UN Post-2015 High Level Panel of Eminent Persons (HLP)

1 Review of past participatory global consultations 'What Do We Know About How to Bring the Perspectives of People Living in Poverty into Global Policy-making?' to inform *Participate*'s approach, and to influence the democratisation of the post-2015 process

2 Participatory video (PV) accompaniment to PRG members initiated by visual methods convener Real Time: with The Seed Institute and Spatial Collective - Kenya, Praxis - India, MEND - Occupied Palestine

1 See review of past global consultations at: www.participate2015.org/ publications

2 www.real-time.org.uk

Praxis 2013

Participatory video accompaniment in Chennai, India

Engagement in the Bali meeting of the Post-2015 HLP

1 First research synthesis launched: 'What Matters Most? Evidence from 84 Participatory Studies with Those Living with Extreme Poverty and Marginalisation'

2 Two-page policy briefings responding to the Bali HLP main themes:

• Citizens in the Global Partnership

• Citizen-led Accountability

3 A short film about a transgender community in Tamil Nadu, India and their experiences of discrimination and vision for change

4 Participate website, blog, and Twitter account launched

1 See 'What Matters Most?' report at www. participate2015.org/ publications

2 See policy briefings at www.participate2015.org/ publications

3 See Towards Acceptance at vimeo.com/66552772

4 www.participate2015.org and twitter@partcipate2015

UK global research synthesis for Participatory Research Group

1 Engagement in the New York meeting of the High Level Panel with *Participate* briefing on 'Voices from the margins' from the global synthesis workshop

1 'Voices from the margins' at www.participate2015.org/ publications

Participate's response to the final report of the UN Post-2015 HLP

UK peers learning Digital Storytelling workshop with participation from 10 partner organisations

① See response to the HLP report at www.participate 2015.org/ publications

Six PRG members undertook Visiting Fellowships at the IDS to pursue writing projects in the field of participation, power and social change
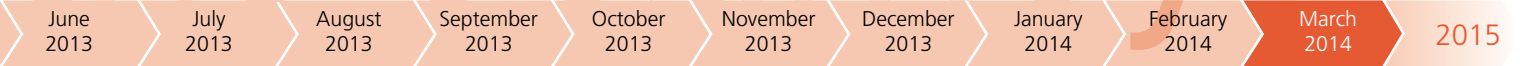
Reflections and learning workshop for the *Participate* network in the UK brought together all the partners and conveners involved in the *Participate* initiative

Participate 2013

Reflective practice ran through Participate

March 2014

ate Journey

| June 2013 | July 2013 | August 2013 | September 2013 | October 2013 | November 2013 | December 2013 | January 2014 | February 2014 | March 2014 | 2015 |

① Ground Level Panels: Deliberative panels made up of people living in poverty took place in Egypt, Uganda, Brazil, India.

The GLPs responded directly to the five transformative shifts for development identified in the final report of the UN Post-2015 HLP.

① See GLP individual and synthesis reports, and policy briefing at www.participate2015.org/ publications

Participate 2013

① Global synthesis report of the Participatory Research Group's findings published 'Work with us: How people and organisations can catalyse sustainable change'

② Policy briefing based on the findings of the 'Work with us' research synthesis

③ The 'Work With Us' exhibition was hosted at New York University during the President of the General Assembly's Special Event towards achieving the Millennium Development Goals (MDGs)

④ Documentary film 'Work with us: Community driven research inspiring change', capturing views from participatory research and the post-2015 policy process, was launched in New York alongside the UN Special Event on the MDGs

① See 'Work with us' synthesis at www.participate2015.org/ publications

② See 'Work with us' policy briefing at www.participate2015. org/publications

③ Exhibition website www.workwithus2015.org

④ Watch the film at www. participate2015.org/2014/01/09/ work-with-us-community-driven- research-inspiring-change

PRG participation at the global synthesis workshop

Increased engagement with our partner the Beyond 2015 campaign: partners engaged in formulating the 'values and targets' main advocacy document.

① The 'Work With Us' exhibition in partnership with the Permanent Mission of Ireland to the United Nations was held at the UN Headquarters in New York. This coincided with the 9th Open Working Group on Sustainable Development Goals session and *'The Contributions of Women, the Young and Civil Society to the Post-2015 Development Agenda'* event.

② *Participate* proposals for post-2015 targets document was shared with the Open Working Group on the Sustainable Development Goals

Finalising *Participate* anthology: Knowledge from the margins

① Exhibition website www.workwithus2015.org

② See targets proposals at www.participate2015.org/ publications

'Work with us' global synthesis report

1.2 Networked Knowledge as Networked Power: Recovering and Mobilising Transformative Knowledge through *Participate*

Felix Bivens

This contribution

This contribution explains how participatory methods can generate transformative knowledge. It articulates a clear distinction between the knowledge produced by conventional research practices and knowledge produced by participatory practices. The contribution articulates a concept of transformative knowledge and provides an analysis of how such knowledge creates change at multiple levels. It also examines the role of global networks as aggregators of transformative knowledge and how these collaborative networks can facilitate the translation of participatory knowledge into reforms of policy and practice at local, national and global levels.

Power in the roots: Participatory methods release grounded knowledge

The power of participatory knowledge comes from its roots, how it is grounded in place, history, worldview and power relations. Its clarity comes from the understanding which emerges from the interaction of these many currents and layers. However, when removed from this reality, its integrity can be easily lost. It becomes a malleable commodity which can be stretched, distorted and inserted at

will into the arguments and rhetoric of researchers and policymakers. For many years, participatory researchers have worked to redefine research as a process of liberation, in which popular knowledge and the academic engines of knowledge production can work in coordination to make visible the knowledge and aspirations of those in poverty and those suffering from other forms of exclusion. The work of numerous participatory researchers over the past four decades has challenged academics to think differently about what knowledge is, where it comes from, who owns it and how those who are the most educated are frequently the most blind to its many and diverse forms. Concepts such as cognitive justice (de Sousa Santos 2006) and knowledge democracy (Hall 2012) [1] are at forefront of this continuing interrogation of how to recognise and relate to various forms of knowledge. Participatory methods have been crucial in putting these seemingly abstract concepts into practice.

Participatory processes enable transformative knowledge

'Participation' is not a stage in the researcher's data-collection; authentic participatory research belongs to the participants. They should determine the questions, be active in the analysis and should

PRG members engage in a Participate digital storytelling workshop

[1] De Sousa Santos, B. (2006) *The Rise of the Global Left: The World Social Forum and Beyond*, London: Zed Books

Hall, B. (2012) 'Towards a Knowledge Democracy Movement: Contemporary Trends in Community-University Research Partnerships', *Rizoma Freireano* Vol. 9

shape and support the presentation of that knowledge which is rooted in their lived experience. The knowledge which emerges from fully participatory methods and processes is fundamentally different than traditional forms of knowledge which are 'produced' in universities because the tools and processes used to produce knowledge inevitably shape the knowledge that is produced.

As such, the primary contention of this chapter and of *Participate* in general is that participatory processes create a distinctive form of knowledge. The knowledge produced through traditional forms of research is principally instrumental; its purpose is to answer a question, to prove or disprove a hypothesis, to evaluate the effectiveness of some already existing programme, or to fulfill the professional requirements of a researcher. Because the researcher is the central power holder, the knowledge that is produced is tightly coupled to the question that is asked at the beginning. The linear movement from questions to answers drives the research process. The answer validates the question and the question validates the wider paradigm in which it is asked. As such the knowledge created by most research further entrenches the power relationships in which it is enmeshed. In contrast, we posit that participatory knowledge is transformative knowledge – transformative because it challenges and changes power relations. More than a critique of the status quo, the process of knowledge generation itself in participatory processes facilitates change. This transformation occurs at five notable levels:

- **There is transformation at the level of the research process.**

   Participatory methods challenge those who produce knowledge, especially those in universities, civil society organisations and the development industry to ask why, for whom and how knowledge is produced. Deeply related to this is quality of the knowledge which is produced by these participatory process. Rather than reinforcing the existing paradigm, participatory research is counter-hegemonic and challenges the existing narrative by revealing experiences and knowledge which are usually excluded from the wider discussion.

- **Transformation happens at the level of the researcher and/or research organisation.**

   Participatory methods continually bring forth new understandings of poverty, marginalisation and power which explode the preconceptions and biases of researchers and their organisations, facilitating ongoing processes of reflective learning. As such the strategies used to tackle these issues are continually scrutinised and reassessed in light of the knowledge and experiences articulated by research participants.

- **Processes aim toward transformation at the level of the participants themselves.**

   The ways in which this transformation occurs is diverse and several pathways have been discussed already – connecting with others in similar situations, aggregating knowledge to build more complete understandings of situations, sharing strategies for local action, building coalitions for wider political action, etc. At the core of all of these is a fundamental shift in which participants come to recognise, value and act upon their own inherent knowledge, skills, experiences – their 'power within' (Veneklasen and Miller 2007). [2]

- **At the aggregate level, these individual transformations lead to change at the community level.**

   New relationships are formed, new communities within communities organise, elements of the fragmented community cohere to address a common cause. Political action may be taken to change power dynamics on the local stage. Local action may also be taken to transform cultural manifestations of power around issues like gender and sexuality within the community itself, where such issues often face their greatest obstacles to change at the neighbourhood, family, and household levels.

- **Though inconvenient, transformative knowledge produced can also influence discourse and policy.**

   The grounded, narrative nature of participatory outputs enable policymakers to understand more specifically the limitations and gaps in existing policy and practice. Through participatory research, the counter-hegemonic knowledge of the poor and marginal can enter physically and politically inaccessible spaces via research conduits. Though outcomes of these encounters may not be immediately clear, as Cortez-Ruiz articulates in his water-cycle theory of change in Contribution 3.1, [3] the results can show themselves later in non-linear but positive ways.

A Foucauldian lens is also useful for understanding why participatory knowledge is transformative. One of Foucault's most enduring arguments is that knowledge is a form of power (1980). [4] His conceptual argument is complex, but the validity of his claim becomes ever more apparent with the emergence of the modern knowledge economy and 'knowledge society' (2002). [5] Foucault's concerns about knowledge and power were also ones of perceived validity – which forms of knowledge are considered real and legitimate – and the ability of dominant systems of knowledge to structure and delimit action. His argument was that most forms of knowledge have been suppressed in recent centuries, except for technical-rationalist knowledge.

[2] VeneKlasen, L. and Miller, V. (2007) *A New Weave of Power, People and Politics: The Action Guide for Advocacy and Citizen Participation*, Rugby, UK: Practical Action

[3] See Contribution 3.1 Linking Community Participatory Action Research to Global Policymaking: Lessons Learned to read more about the water cycle theory.

[4] Foucault, M. (1980) *Power/Knowledge: Selected Interviews and Other Writings*, New York: Pantheon Random House

[5] World Bank (2002) *Constructing Knowledge Societies: New Challenges for Tertiary Education*, Washington, DC: World Bank

While this paradigm of knowledge has produced many positive outcomes for society, its increasing hegemony threatens to eliminate other ways knowing about or seeing the world, which are essential for addressing the increasingly apparent and serious flaws of the dominant paradigm itself.

The consequences of this knowledge monoculture are many, but two issues are especially significant to *Participate*'s work. The first is that technical-rationalist thinking pervades our systems and our policies. Solutions to complex social problems are addressed with engineering-style programs. Linear, mechanistic thinking dominates, leading policymakers to implement linear, mechanistic programs to address poverty and marginalisation. From 'stages of growth' models to logframes, the development industry has always been deeply wedded to this way of thinking. The second major consequence of this technical-rationalist hegemony is the long-term suppression and loss of other ways of seeing and understanding the world. Becoming 'developed' or 'modern' has required individuals and groups to give up and even mistrust their alternative experiential and cultural understandings of the world. By denying the validity of their own knowledge and cultural wisdom, communities instead accept the legitimacy of the technical-rationalist paradigm, and in this process are inherently relegated to its far margins, to the bottom of the hierarchy and thus contribute to their own disempowerment.

Participatory methods can be a counter force to this process. Whereas traditional modes of knowledge production are about discovery, participatory research is largely about recovery – the recovery of ideas and worldviews that have been undermined by policy, media and education systems which stigmatise and belittle the knowledge that people inherently have as individuals and social groups.

As Palmer writes, 'The opposite of remember isn't to forget, but to dis-member. And when we forget… we have in fact dis-membered something' (1993). [6] In Palmer's conceptualisation, 're-membering' then is about putting the broken fragments back together. Participatory research plays such a role by validating the ways of knowing of the poor and marginal through collective processes of sharing and analysis in which the broken fragments are 're-membered' into a coherent understanding. This process increases understanding of where there is room to maneuver and to act to make change, and also to understand the power in the system and its contribution to their marginalisation.

From fragmentation to transformation

This movement from fragmentation to collective knowing and transformation is at the heart of participatory methods. The fragmentation of knowledge mentioned above is only one form of 'dis-membering' that happens in marginalised groups. Social fragmentation is also at play. Despite idealised notions of community, competition for resources and income can lead to the breakdown of social capital, rather than the increase of it. Moreover, as situations move from bad to worse, non-cooperation evolves to violence, as the findings of the 'Work with us' report confirmed, wherein human security was an overarching concern of poor and marginalised communities around the globe (2013). [7] From this perspective, participatory research should be seen not only as a form of research but also a form of community building and political organising. Even in processes such as digital story-telling (DST) [8] where the output may be a single individual's narrative, the space in which that narrative is created is one of shared experience and collective analysis. Through the extensive surfacing of experiences, and through

In participatory research dialogue deepens our understanding of the issues at hand

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[6] Palmer, P. (1993) To Know as We Are Known, San Francisco: HarperOne.

[7] See the *Participate* global synthesis report 'Work with us: How people and organisations can catalyse sustainable change' (www.participate2015.org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).

[8] See Gill Black and Pelagia Tusiime's reflections on digital storytelling in Contribution 2.1 Methods and Challenges in Using Participatory Processes in Diverse Contexts: Bridging the Gap Between Community Reality and Policymaking.

the sharing of challenges and solutions, research participants come to develop a more complete and holistic understanding of their situation. Group knowledge is 're-membered' in Palmer's sense of the word. This emerging knowledge mosaic leads to a deeper grasp of the whole of the situation, and provokes new questions about the sources of problems and reveals capacities for action within the community to respond to the pressing concerns which have been raised.

From the perspective of power analysis, participatory processes create a 'new weave of power' (VeneKlasen and Miller 2007). [9] They enable isolated individuals to connect and build networks and alliances with others in their own context, or elsewhere, facing similar circumstances. Each person is a thread, with only limited experience and knowledge, but as the process brings more people together, enabling them to share and analyse their aggregated knowledge, those individual strands weave into a dense tapestry of 'knowledge-power' which holds potential energy for collective action at community and political levels. Frequently, participatory processes have the most potential at the local level where knowledge is most grounded in relationships and experience. Those who participate are empowered by the validation of their own knowledge and ideas and their capacities are augmented by the knowledge of their peers and the new connections made through collective analysis. However such groups are often limited by scale and mobility. While ideas and innovations may be easily transmitted within a limited range, such groups are typically dependent upon outside researchers to carry their messages beyond the bounded range of their social networks and geographic mobility.

Networking transformative knowledge through *Participate*

Participate was an opportunity to take participatory processes to another level of scale and complexity by bringing 18 participatory research organisations together to facilitate a meta-process, where the transformative knowledge-power within these 18 nodes could be consolidated into an even more comprehensive and holistic articulation of poor and marginal voices from around the world. As *Participate* took shape, the collaboration of networked organisations became a system of networked knowledge and a constellation of networked power which spoke with a global insight, coherence and authority that any one of the nodes would not have been unable to achieve on its own. Through a collaborative synthesis of the work of these multiple knowledge partners, a new and even richer weave of 'knowledge-power' was generated.

Just as participatory methods at the community level are highly dependent on collective analysis, the work of *Participate* was also premised on collective analysis by the various groups and researchers which

comprised the network. The key research and policy report which emerged from the *Participate* initiative, 'Work with us', was the product of multiple synthesis processes. First, a layer of synthesis by the local research organisations who the drew connections between their various participatory inquiries. These local syntheses contributed to a larger global synthesis processes which occurred during a five-day workshop in which all of the network organisations were present and helped to shape an overarching set of policy messages which most accurately reflected the stories and experiences which were emerging at the grassroots level. Since the development of the 'Work with us' report, *Participate* and its many partners and participants have worked ceaselessly to mobilise these findings at all levels of the policy environment, from local and global. [?]

Conclusion: Mobilising transformative knowledge

Knowledge is an increasingly valued and sought after resource. Those who generate and control the flow of knowledge wield great power. Yet the perception of knowledge as a scarce resource is unfounded. Knowledge is omnipresent and created everywhere and continually. Poor and excluded people also possess knowledge; knowledge rich with an understanding of their situations that policymakers and other advocates often fail to connect with. Through participatory research processes, those at the margins of society can find space and encouragement to analyse their challenges and articulate the changes necessary to improve their conditions. While this knowledge is grounded in specific, local circumstances, networked participatory processes like *Participate* can highlight the common threads which bind these many experiences together and better illuminate the active production of poverty by current global systems and policies. Promoting dialogue and comparison across these many spaces and experiences, and clarifying the linkages between local realities and national and global policy is what makes networked participatory research a powerful force for change. Moreover, the processes in which this networked knowledge is produced does not simply make the connections visible. By actively calling participants into a transformative process of challenging and changing the system at the level in which a particular participant is engaged, the research makes their understandings more vivid and the felt need for action more immediate. Further, the networked nature of a process like *Participate* also informs those involved that they are not acting alone, and that their actions benefit and enable others in a dynamic, interactive sequence of challenges, changes and reforms which can lead to the improved quality of life for many across a wide terrain, and not just in the immediate vicinity of one's own engagement and struggle.

[9] VeneKlasen, L. and Miller, V. (2007) A New Weave of Power, People and Politics: The Action Guide for Advocacy and Citizen Participation, Rugby, UK: Practical Action

1.3 Risk, Tensions and Lessons in the *Participate* Process

Thea Shahrokh and Joanna Wheeler

This anthology is part of a reflective process that is central to the approach that we have developed within *Participate*. In our view, critical reflection is important to the development of participatory approaches to policy influencing in order for us to learn about how to improve and adapt how we work. Without a meaningful evaluation of what we have done, there is a real risk of simply falling into patterns that repeat mistakes, or failing to see mistakes at all.

Reflective practice enables us to critically examine our actions and those of others in order to increase our understanding of why we do what we do and how we can do things differently. As such, the reflective process is not carried out in a vacuum: it is also situated in the social and political structures within which we research and act. Therefore our process of reflection has included public and political dimensions, as well as private and personal ones. By linking to the wider context, reflection can help others who are facing similar situations or problems. Sharing the outcomes of this process allows learning to be taken back into practice.

The reflective process that we have undertaken enables us to:

- Study decision-making processes and assess them critically

- Analyse gaps in our own knowledge or in the field more generally

- Understand challenging moments and face the implications of these

- Identify learning needs within the network and beyond

- Recognise factors that contributed to successes and failures in our work

This anthology is a compilation of different kinds of reflections. Some have been developed through collective and iterative analysis in order to take a closer look at what we have done and how. Other contributions are more descriptive of moments and activities, but with a view to prompting critical evaluation. The anthology tries to capture different aspects of the lessons we have learned in order to make these clear and useful to those outside the network, as well as useful for our own practice.

In *Participate*, we have tried to structure reflective and evaluative elements into as much of our work as possible.

This includes:

- Network members evaluating our collective activities, such as workshops, trainings, and events, and incorporating these evaluations into future planning

- Including reflections on how we work within our written outputs on the research results and incorporating this into how we communicate about research findings

- Incorporating reflection on the uptake/exchange of new methodologies in the writing process for research outputs

- Peer-review on methodologies and approaches at multiple points in the research process (design, analysis, communication and advocacy)

- A remit for the steering committee that includes attention to the quality of the process of how we work

- A five-day workshop in November 2013 used to develop and document individual and collective reflections on all aspects of our work

Through this process, we have negotiated a number of risks and tensions. And through the reflective process, we have identified some important and striking areas of learning.

Risks and tensions

At the outset, based on the prior experience of many members of the network, we collectively identified the main areas of risk to the integrity of our work:

- The initiative would be ignored and have no impact on the post-2015 debates, contributing to the disillusionment of those contributing their time to participate

- Words and agendas generated through the process would be co-opted and utilised to further existing agendas driving rather than transforming inequality and poverty

- Researchers or intermediaries representing grassroots perspectives in far removed political spaces would not be able to maintain the integrity of those perspectives

- Researchers and practitioners would push their own agendas rather than those of the marginalised individuals/groups/communities involved in the research

In practice, these *risks became expressed as tensions* that we had to navigate throughout our work, both in an ongoing way and at key moments of decisions:

There was a tension around promoting a nuanced understanding of participation that includes an awareness of power and politics in a context of carefully crafted advocacy messages and policymakers interested in top-line and simple messages. For many in the policymaking process, the idea of participation was understood as 'consultation' or 'listening to the poor'. The gap between this and an understanding of participation as transformative of development was vast. This created a tension: we were trying to advance the understanding of participation and at the same time we were trying to gain acceptance of the importance of even rudimentary forms of participation.

Related to this, was a tension around the adequate and authentic representation of highly marginalised groups within a system that is structured to exclude them, and the kinds of knowledge generated through participatory research. In practice, this came to the fore when we considered how to best represent the participants in the research at different policy events. The issues around what made these varying forms of representation legitimate are complex, and we had to consider them in each policy forum and context. [1]

There was a sharp tension between the need to build meaningful relationships between marginalised groups, policymakers and researchers in order to achieve lasting change, and the need to respond to extremely tight deadlines dictated by the United Nations (UN) process. To a certain extent, *Participate* needed to do both in order to be successful, and yet these two needs were often at odds.

Participate's legitimacy in the global policy space rests on the legitimacy and quality of the participatory processes involved. However there were significant tensions between the time needed for legitimate collaborative and participatory processes and the form of what is generated through these processes, and what is needed to achieve 'traction' in a global policy process. For example, as the High Level Panel (HLP) met to deliberate on its final report, the Participatory Research Group (PRG) was gathered in the UK for a collective workshop to frame the analysis for all 18 studies. *Participate* was asked to provide policy recommendations to the HLP on the basis of these studies in the same week as the network was struggling to make sense of 18 different studies and construct an authentic collective narrative.

This relates to the form and type of knowledge that emerges from participatory research. As argued by Bivens in 1.2, the transformative potential of participatory knowledge is tied to its roots and the way in which it is grounded in the context that is was constructed in [2]. In itself, this type of knowledge provides a complex challenge to the current development paradigm. This meant that the messages that came out of the research were often politically unpalatable. For example, we were challenged by policymakers to provide 'examples of goals and targets', whereas the messages from the research asserted the need to treat those living in poverty and marginalisation holistically and with dignity – urging policymakers to see them as people capable of changing their own circumstances. For those few policymakers genuinely committed to including the most marginalised in the process, *Participate* had the obligation to translate the findings of the participatory research into target-orientated recommendations.

Reflective practice will often show the interconnections between the issues being explored

[1] For further reflections on the issue of representation in *Participate*, see Contribution 3.3 Representation, Advocacy and Engagement Across Levels and Spaces: Reflections from Participatory Practice

[2] See Contribution 1.2 Networked Knowledge as Networked Power: Releasing and Mobilising Transformative Knowledge through *Participate*.

The risks for Participate are linked to the significance of what we are trying to achieve

Lessons learned

Chapters 2 and 3 explore these tensions in greater depth, through reflections on the variety of experiences in the PRG. Many of the contributions to the anthology contain their own particular lessons. However, in relation to the overall initiative and the overarching goal of using participatory research to influence policy on many levels including the global, here are some of the *key areas of lessons we have learned*:

- The policy openings within the post-2015 agenda were both enabling and limiting.

  Enabling because of the availability of resources, energy and the commitments it produced, but nonetheless limiting because of the short timeframe provided by this brief policy window. Processes had to be rushed, deadlines were dictated externally, and the opportunity for developing sustained relationships and deeper capacity building were curtailed. While *Participate* was premised on the challenges of mobilising the poor and marginal into policy discussions, through this process we became more cognisant of the challenge of mobilising policymakers to step outside of their own margins and towering heights. ③

- Empathy builds connections.

  Participatory research of the kind described in this anthology can generate narratives which bring with them authenticity and urgency which

shine clearly even in the fog of information, numbers and reports. By reaching out directly to policymakers through their stories, the poor and the marginal can recruit decision-makers to participate in their agenda. These narratives can touch policymakers at a human level and inspire action. As participatory practitioners, we can provide the background and contextual information for the narratives and in this way help to give some guidance.

- The role of the researcher matters.

  As the mobilisers of ground level knowledge, researchers play a role in directing this information into strategic spaces at opportune moments. Researchers and practitioners must be advocates, political analysts, and strategic communicators. We became personally engaged in political processes and strategies involved building relationships with the gatekeepers of global-level policy who could contribute to the mobilisation of the information we have to share. ④ Such actions required risks – risks that our social and political capital will be used up, or that that we will fail to meet the expectations of those at the grassroots level who have even more at stake.

- There are multiple pathways to influencing.

  The language of complexity has permeated the discourse of development. In relation to this, *Participate* contributors have added some clarity to how we can accept this reality while still retaining

③ See Contribution 3.4 How Change Happens: Pulling Together and Closing the Gap which discusses the importance of learning to 'pull' policymakers out of their isolation to bring them into conversation with perspectives traditionally omitted from the policy process.

④ Read Contribution 3.2 for Mwangi Waituru's reflection on the tensions of working with gatekeepers within the influencing process.

some sense of how to navigate the non-linear realm of policymaking. As we gain strategic insight on how to navigate this complexity, it also leaves us with a new question: To what extent can people living in poverty hold global policymakers to account within such a non-linear and ever changing environment?

• **Influencing policy requires constant innovation in our approach.**

The boundaries of participatory practice can be pushed further still. Designing methods which

collapse the space between people on the ground and the policymakers is an increasingly challenging task. Adherence to certain principles, values and ways of working are key for maintaining the legitimacy and integrity of a process from the research perspective. Ultimately, the most effective participatory processes are not those which are simply methodologically sound but those which also galvanise participants to engage directly in challenging the issues and power relations which are driving their marginalisation and poverty.

1.4 Reflections on Collaboration in the *Participate* Network: First Person Narrative Reflections

The contributions

The contributions shared in this section focus on some of the key lessons and factors that add to the formation of an effective, enjoyable and collaborative network. Lessons are presented on relationship building, mutual understanding, trust and recognition of the value that different levels of experience bring to a network. The authors present their experiences of the network not only as an instrumental space for producing research, but also as a supportive community of practice. Both Erika and Kwesi acknowledge the challenges of mobilising this knowledge into narrow policy spaces, and the overall lesson of needing to challenge power structures to create new spaces in which participatory knowledge can be truly catalytic and transformative

## Reflections on collaboration in the Participatory Research Group

Kwesi Ghartey-Tagoe

In development work, collaboration is essential. It is often said that 'one organisation cannot do it alone.' There is power in numbers, but very often barriers to collaboration exist. Organisations and agencies may have similar aims and objectives but when it comes to working together on a specific project with defined outcomes it could be difficult. The result is competition amongst a number of organisations for fewer campaign spaces. For a collaboration to survive it is important to build internal cohesion; setting the objectives for the collaboration with the desirable outcomes. The idea is to build trust and develop a shared vision. With these in place, collaborations can be participatory, fruitful and open up opportunities for innovative research.

Participate has brought together a Participatory Research Group (PRG) of organisations from across the globe; [1] and the cohesion between them is

shown in the collaboration of members in 'bringing the perspectives of the poorest into the post 2015 debate.' In order to optimise this collaboration, PRG members should take a central role in this collaborative effort.

In the context of *Participate*, collaboration can be seen at different levels: one level is among member organisations (this is how the current network stands). This involves recognising the unique expertise that each member organisation brings to the collaboration and sharing experiences thereof. Extending the way we see collaboration further, another could be at the level of member organisations within the collaboration being seen as a unit in partnership with relevant civil society organisations and international non-governmental organisations. Such a relationship should also be mutual as benefits to be gained will flow both ways. Importantly, another level is the partnership with the people we hope to work with: the marginalised and the poor in our communities. They should be at the centre of all we traverse.

Collaborative learning is the process through which knowledge can be created within a network where members actively interact by sharing experiences and ideas and adopting new ways of doing things. My experiences working with the Ghana Community Radio Network (GCRN) [2] have shown me how collaborative learning within a network can happen, as illustrated in Box 1, on the next page:

As we think about the future and ways of working as a network, important questions about how this collaboration relates to the strategy and focus of each organisation are being raised.

I suggest that the basic criteria for our ongoing collaboration could include: demonstrated effectiveness in using a rights-based approach to empower poor, disadvantaged and marginalised people; demonstrated commitment to empowerment, not just service delivery; willingness and eagerness

[1] For more information on these Participatory Research Group members review the interactive map on the *Participate* website (www.participate2015. org/prg/).

[2] Find out more about the Ghana Community Radio Network on their website (www. ghanacommunityradio. org/).

BOX 1

The Ghana Community Radio Network: Example of collaboration at a national level

On a national level community radio stations in Ghana have been collaborating to better achieve common goals. GCRN is more than a network. It is a collaborative network. Its members are autonomous and geographically distributed across the length and breadth of the country. The essence of this collaborative network focuses on promoting the growth of Community Radio as a tool for rural and marginalised communities to exercise their right to communicate and, through and alongside this, their right to participate in and drive the process of development and empowerment. Coordinated from a secretariat, members do this by using a holistic process of participatory programme development that integrates community research, training and programme design, production, broadcast and evaluation. This approach interweaves on-air broadcasts and off-air initiatives seamlessly and interactively, each designed for optimal participation

and each enriching the other. Besides the collaborative networking between community radio stations, member stations work with largely volunteer producers from the communities who are trained through 'home-grown' training workshops and participate with the communities in every stage of the process. Specific examples include the series on Community Participation in Local Governance (CPLG). The CPLG was produced independently in three different local languages by three member stations in different parts of the country and broadcast. It was used as the basic template for a series on Community Participation in Natural Resources Management (CPNRM), which went on the air on two other member stations in yet another local language. Both series represent the systematic fusion of the individual experiences of the stations as well as the ongoing enrichment of the repertoire of participatory tools used by GCRN.

to work in a collaboration; willingness to devote the time and energy needed for this effort under the collaboration and also to contribute to the diversity of thematic focus areas within the PRG.

My journey through networks

Erika Lopez Franco

[1] An essential element of *Participate* was the collaboration between Participatory Research Group (PRG) partners on methodological accompaniment and innovation. As seen in Chapter 2 [2] of this anthology, diverse approaches were enabled and developed, across different places and working with a variety of actors from grassroots activists to global level decision-makers.

Without doubt, one of the most significant moments within *Participate* (and perhaps in my career as a 'development worker') was taking part in the Latin American Participatory Video (LAPV) workshop in La Paz, Bolivia. Amongst volcanoes and sunny skies, activists living in extreme poverty, non-governmental organisation (NGO) workers, and a few researchers learned about video as a means to directly voice demands, but also as a methodological approach that allows change to emerge from the ground up.

Under this spirit, 'strangers' from Bolivia, Peru, Honduras and Mexico immersed into deep discussions around sensitive and personal issues such as domestic violence, discrimination and alcoholism. The open, flexible, and clear facilitation style of PRG member Carlos Cortez Ruiz from Universidad Autónoma

Metropolitana, Mexico (UAM-X), allowed the workshop 'Sumando Voces' ('Adding Voices') [3] to become a space for honest reflection amongst peers. Conversations became highly emotional [4] and went way beyond the formal sessions into the late evenings. I believe this level of in-depth interaction allowed for a bond to develop, a unique connection represented in the creation of a symbolic but powerful name for this group: La Hermandad (The Brotherhood). [5]

By the end of this learning process we transitioned into an interaction with community activists and domestic workers [6] (who were connected to two of *Participate*'s partners), and worked with them to build films on issues pertinent to their aspirations for social change. This shift towards implementing our learning in practice further strengthened our relationships and catalysed an ambition to work collectively on participatory video for social action. Our activities have included: five community screenings in rural and urban areas across Bolivia to generate debate and reflection on the issues being raised; the advocacy efforts of Juan Carlos Baltazar from ATD Fourth World, and continuing engagement with high level decision makers at the United Nations. A collective publication 'Sumando Voces' documenting this journey is being finalised. [7]

The LAPV workshop was constantly on my mind during *Participate*'s reflections and learning week (where this anthology was conceptualised), in particular what this means for a networked way of being and working. The rivers navigated by all of us through these two years have been at times

[1] Parts of these reflections gather insights from in-depth conversations with Kwesi Ghartey-Tahoe from GCRN, Valentina Pellizzer from OWPSEE, and Vivienne Benson and Marion Clarke from IDS.

[2] See Chapter 2 Starting with People: Learning from Participatory Practice.

[3] This name, suggested by Bolivian partner UNITAS, represents the sense of a space where all voices came together to become greater than the sum of its parts.

[4] The *Participate* global synthesis report 'Work with us' reflects the enormous value of these discussions, in that a quote from LAPV workshop participant Eugenia Zenteno opens the Executive Summary (www.participate2015. org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).

[5] La Hermandad symbolises the spirit of union that emerged spontaneously throughout this methodological learning activity. Participant reflections can be found on the *Participate* website (www.participate2015. org/2013/04/26/exploring-the-power-of-participatory-video-in-bolivia/).

[6] 'Las trabajadoras del hogar' was a film made by women who work with PRG partner ATD Fourth World. They strongly convey a message around collective action to fight for respect to domestic workers' rights (vimeo.com/69338447).

[7] This publication will be hosted on the *Participate* website (www. participate2015.org/ publications/sumando-voces/).

Throughout Participate PRG members have met face to face for network strengthening activities

challenging and at others truly invigorating and motivating. I have realised that throughout this process we have woven a 'network of networks'; that each of our streams, rivers and lakes are intertwined. [8] On one hand, many PRG partners were already part of local and national level networks; bringing this experience to our practice. [9] On the other, the spaces for co-creation enabled through *Participate*, allowed for the formation of sub-networks related to the wider global initiative.

In conversations with Vale and Kwesi throughout this reflective phase we identified what we see as those unique elements that are fundamental to the core of our network. The confluence of these factors has allowed for: the development of a shared identity with diversity to exist; the ability to navigate the inherent tensions of such a complex and time-constrained endeavour; and the desire to carry forward activities autonomously but in a networked way. Underpinning these elements is the recognition and contestation of discriminatory power structures – both formal and informal – within which the PRG partners operate. These core elements are:

The way we see, relate and interact with people

We must see ourselves and the community members engaged in the participatory research as partners in achieving change. For change to be sustainable and effective, our work must be aimed at generating individual and collective agency and citizenship.

Research as the construction of transformative knowledge [10]

Despite using a variety of methods, all of us share a transformative understanding of participatory research, advocacy and communications. People are capable and willing to construct their own knowledge, articulate messages and question the information that has been given to them.

Our position towards policy and policymakers.

Policies must be designed in order to guarantee people's rights, as defined by them, only in this way change responsive to each context can happen. Policymakers are temporary and their interests politicised; as such, policies can only be sustained through the meaningful participation of the people they affect the most.

Weaving this network of networks has not been easy. However, I believe that many of these relationships will endure, opening minds and spaces for questioning the way we understand 'development'. Despite being invisible in logframes and results-based approaches to impact; for me, the networks formed have been a unique contribution of *Participate* across the diverse regions and spaces where it has engaged.

[8] In Contribution 3.1 Linking Community Participatory Action Research to Global Policymaking: Lessons Learned, Carlos Cortez Ruiz uses a similar river analogy to explore the policy cycle, of which this network of networks is an important part.

[9] See Contribution 1.4 for Kwesi Ghartey-Tagoe's reflection on collaboration within the *Participate* process.

[10] For further exploration of the concept of transformative knowledge see Contribution 1.2 Networked Knowledge as Networked Power: Recovering and Mobilising Transformative Knowledge Through *Participate*.

Chapter 1 author biographies

Thea Shahrokh is a researcher on issues of social and gender justice. In *Participate* she plays a leading role in the coordination and delivery of major research outputs, and the work of the network on innovations in pathways of local-global participation. Thea also works with the Participatory Research Group on network strengthening activities.

Joanna Wheeler is a researcher, facilitator and trainer in participatory processes, including creative storytelling approaches. She was co-director of *Participate*. For Joanna, participatory ways of working are crucial to eventual outcomes of greater social justice, democracy and development. She is based in Cape Town, South Africa.

Felix Bivens is founder and director of Empyrean Research. He also serves as Associate Dean of Academic Affairs and Research at the Future Generations Graduate School. Felix collaborated with *Participate* on a number of fronts including evaluation, workshop facilitation, and the development of the anthology.

Kwesi Ghartey-Tagoe is a journalist, co-founder and Head of Radio Peace in Winneba, Ghana and Chairman of the Executive Council of GCRN. He supports and extends the capacity of marginalized communities to lead their development by using participatory radio programmes; empowering communities to demand rights for economic and social development.

Erika Lopez Franco helped to convene the initative's 18 participatory research studies; supporting network members in methods innovation and their research processes, and linking them with the Research Convenors and the *Participate* core team. She has strong links with the Latin American partners and other regional actors.

HEPS Uganda 2013

Mutual learning opportunities between PRG members enabled participatory theatre training in Uganda

ATD Fourth World 2013

2 Starting with people: Learning from participatory practice

Ground Level Panels were one of the methodological innovations within Participate which shifted how we see where policy happens

Participate provided the unusual opportunity to extend the application of participatory approaches into the negotiation between ground level understanding of the realities of poverty, and the formation of global policy. This chapter focuses on what we have learned about how to use different participatory methods to engage extremely marginalised groups in informal and formal policy processes.

There are two sets of contributions to this chapter, 2.1 (page 27) is based on collective in-depth reflection and analysis by participatory practitioners on key methods used in *Participate* including:

- Participatory video in Kenya (page 27)

- Ground Level Panel (GLP) in Uganda (page 30)

- Digital Storytelling in Uganda and South Africa (page 32)

- Participatory Action Inquiries in Bangladesh and Bolivia (page 36)

The contributions in 2.2 (page 39) include personal reflections on the interface between participatory practice and the policy process through other methodological aspects of *Participate*'s work including:

- Documentary film-making (page 39)

- Multimedia exhibition (page 40)

- The process of designing the GLPs (page 41)

- Participatory systemic inquiry (page 43)

Participate's research has shown that for any future global development framework to be effective, a shift in paradigm is needed. Without truly engaging with the realities and knowledge of the people on the ground, development interventions risk continuing to generate many unintended consequences and negative outcomes. The challenge is that the views of the most marginalised people are by definition largely absent in public forums, which further excludes them and in turn amplifies the perspectives of the more powerful groups. Bringing these people and perspectives into policy processes is not a straightforward task.

Participatory research is one way that these perspectives can be articulated, and yet there are many challenges in how to do this well. [1] This chapter explores some of the specific issues and questions that emerged in the participatory processes within *Participate*, including:

- Understanding what is needed for a participatory process to lead to policy engagement in a way that builds the capacity for participants to engage from a position of confidence

- Changing how we see policy through repositioning where and how policy influence emerges, and what counts as knowledge relevant to those policies

- Recognising the different roles, tensions and compromises involved in using participatory methods well to influence policy

[1] See Contribution 1.3 Risk, Tensions and Lessons for further analysis of the challenges and tensions encountered within the *Participate* process.

Deepening our understanding of participatory processes

This reflective process has deepened our understanding of how meaningful participatory processes can occur while explicitly linking to policy at different levels. In our experience, participatory processes need to start by building communication, confidence and capacities for expression in secure and familiar spaces within the community. Then, in order to be effective, participatory approaches need time to develop supportive and trusting relationships and more equitable dynamics before the group enters any policy space at the local, national or global levels. Deeper understanding through reflecting together on what is really going on and how it can be addressed also takes time. In *Participate*, while we recognised that these steps were necessary, we also faced significant time pressure dictated by the schedule of the United Nations (UN) process. Some of the key lessons that we learned were around how to maintain the quality of a participatory process at the grassroots within the constraints of a highly compressed and politically contested global policy process. The contributions to this chapter include specific lessons from the use of different methodologies.

Changing understandings of policy

Policymaking is not restricted to the offices of high level government officials. As will be shown through the experiences of the authors, it can happen almost anywhere and in different ways. Participatory research is not just about generating knowledge but as group solidarity builds it can provide a means for people to act to improve their community.

However, people in poverty cannot address wider social issues alone.[2] Our experience has shown that there is a need to create the conditions for mutual understanding between communities and decision-makers and shared commitment to action to tackle the manifestations and sources of problems. Participatory processes can be a way of building more equitable relationships and working collaborations between top down and bottom up.[3]

A further key learning from our reflective process is how influence can emerge through iteratively evolving activities from the ground level. Contribution 2.1 will show how participants have built power as they have claimed spaces for policy influence from the local level up, how we have tried to bring policymaking to the ground, and the implication of this in terms of how we position understanding about where policy influence happens and how it emerges.

Recognising the roles, challenges and compromises of participatory research to influence policy

Participatory processes can unearth what really is going on in a particular setting, as well as engaging people in collective action towards improvements. However, in reality participatory projects occur between different (sometimes conflicting) perspectives, with barriers generated by local power dynamics that can function to maintain the status quo. The potential of participatory research is constrained by such challenges when applying idealised notions about practice in actual situations. To better prepare practitioners it is necessary to increase awareness of the compromises, contradictions, tensions and ambiguities involved, as they are always part of the territory when intervening to catalyse social change.

The potential of participatory processes for policy change

Speaking truth to power has never been a simple or safe activity. The rawness and directness of the realities communicated through *Participate* challenged dominant policy narratives, reconstructing them at a human and personal level. Sometimes the response from policymakers was empathy, engagement and action, while at other times the opposite. As such the need for participatory research, learning and action remains as important as ever. When participatory research is undertaken through a critically reflective, nuanced lens there is potential to:

- Communicate the issues and experiences important to the particular marginalised groups in context

- Assist policymakers in making human connections with particular people living in poverty; the issues are humanised through real life examples

- Re-position recipients of development issues as active collaborators with contextualised knowledge to offer

- Visually communicate subjective aspects of development that are missed by quantitative, or less deep or grounded research

- Provide different perspectives to initiate cross-interest dialogue

We hope that the following chapters add meaningfully to the body of work on participatory methods, and provide a glimpse of what is possible using innovative, and transformative approaches to address the ongoing struggles for justice around the world.

[2] This was clearly expressed in the film made by community mappers in Mathare slum in Kenya 'Working together for Change' (vimeo.com/74427417).

[3] The authors of contribution 3.4 How change happens: pulling together and closing the gap, argue that this requires that more powerful stakeholders do more than listen, but are prepared to work with communities on their terms.

2.1 Methods and Challenges in Using Participatory Processes in Diverse Contexts: Bridging the Gap Between Community Reality and Policymaking

Using participatory video in Nairobi, Kenya to enable community-led change

Michelle Kahiu Gathigi and Jackie Shaw

Participatory video

Participatory video (PV) **1** is an interactive group process, used to build participants' social influence; particularly groups whose perspectives are marginalised. It involves groups in their local contexts communicating their experiences and opinions through collaborative video-making, generally facilitated by a practitioner. For example, some *Participate* partners (Spatial Collective, Seed Institute and MEND) **2** have used it as the main method for structuring and driving their participatory research processes with people living in poverty (as seen in the report 'Work With Us'). **3** During the research process, practitioners and community researchers go through cycles of filming and playback activities. This builds relationships between participants, enables deeper analysis of their own realities, and instigates action towards social change based on the knowledge that emerges (Shaw 2012b). **4**

As video has become increasingly available, different approaches have evolved, none without challenges. If there is time and support, PV processes can unfold through cycles of production and playback, to open external dialogue between a group and others outside the 'production team', in progressively diverse social spaces. We (Jackie and Michelle) considered the way PV processes evolved in Nairobi, Kenya,

discussing whether and how policymaking influence was affected, and the challenges presented by this methodology. The following contribution reflects some of the learning from this conversation.

Participatory video as a process of change in Mathare

As a Participatory Research Group (PRG) member, Spatial Collective's **5** youth data collection team in Mathare (one of Nairobi's largest slums) have been exploring major issues facing their own communities through mapping. This group saw value in incorporating PV processes into their work, because it could generate deeper understanding through gathering stories, and showing and discussing the community realities. Three members of the youth data collection team **6** received initial training from Real Time including PV activities, introductory video production, facilitation skills, ethics, and in-camera editing. They started by peer training their fellow youth data collectors, so that they could develop the participatory video together.

In their work to explore the major issues facing residents of Mathare, the youth data collection team identified the issues of health and sanitation, and

Spatial Collective 2013

Participatory video process

An initial group-building phase uses video exercises to increase people's confidence, self-expression and establishes a shared purpose. An internally focused learning stage involves cycles of filming action and playback, as a way of exploring community reality and group concerns. This provides time for group reflection on the issues in confidence before communicating externally. Group members move into a phase of production, and video material is then used to stimulate horizontal dialogue with peers or vertical dialogue with policymakers locally or nationally.

Participatory video in Mathare slum, Kenya led to young people proposing solutions to issues of insecurity and poor sanitation

1 Participatory video is not new (e.g. White 2003), with the Canadian Fogo project in the 60s, which involved islanders facing a government-resettling programme, often cited as an early example (Crocker 2003). This started a process of video dialogue with decision-makers, resulting in the formation of a fishing co-operative, decreased unemployment and the halting of resettlement.

White, S. A. (2003) *Participatory Video: images that transform and empower,* London: Sage Publications

Crocker, S. (2003) 'The Fogo Process: Participatory communication in a globalising world', in White, S. A. (2003) *Participatory Video: images that transform and empower*, London: Sage Publications

2 For more information on these PRG members review the interactive map on the *Participate* website (www.participate2015.org/prg).

3 *Participate* global synthesis report 'Work with us: How people and organisations can catalyse sustainable change' (www.participate2015.org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).
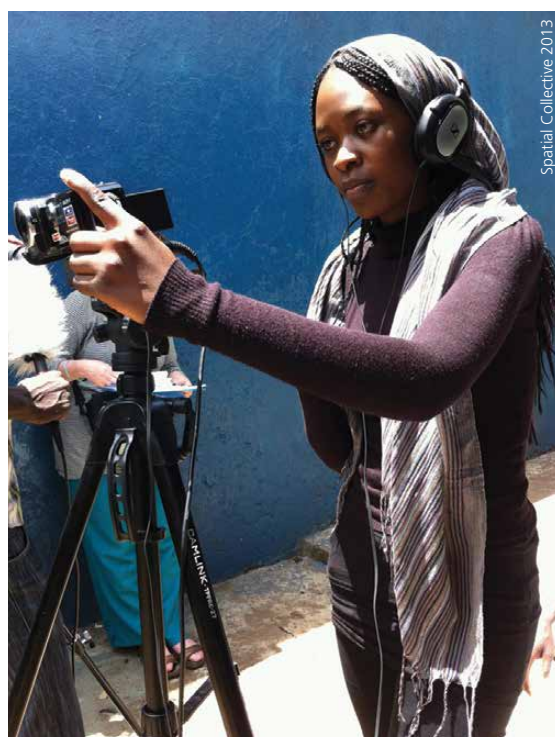
4 Shaw, J. (2012 a) *Contextualising empowerment practice: negotiating the path to becoming using participatory video processes.* PhD thesis, The London School of Economics and Political Science (LSE), etheses.lse.ac.uk/400/ (accessed May 6th, 2014)

5 Spatial Collective is a Nairobi-based social enterprise working through data collection and visualisation to support communities to identify available resources and apply this knowledge in development initiatives. Find out more on their website (www.spatialcollective.com).

6 Find out more about the youth researchers or 'mappers' involved in this project - Purent Odour, Thuo Wanjiku and Charles Juma, and community support worker, Simon Kokoyo - on the Spatial Collective website (www.spatialcollective.com/about/).

insecurity as the focus for the video research. They documented the situation visually, and gathered perspectives from community members. After further editing and production training, they produced a first video on sanitation as a discussion starter. Thereafter, they invited community members to watch the health and sanitation video they had created and opened the floor for discussions, engaging the wider community in what could be done. The screening session prompted a discussion on how the residents themselves can make a difference on these issues, such as community clean up exercises. The Spatial Collective perspective is that *everyone wants to make their world a better place, and that communities already possess the knowledge, resources, and desire to address some pressing needs.* The youth data collectors applied video processes, not only to gather multiple viewpoints on the issues of sanitation, but to instigate cycles of sense-making to shift the deliberation to what could be done (see examples in table below).

Michelle further reflects on this process:

> *"The participants who appeared [at the video screening] were a mix of community elders, women and young men – grassroots policymakers. The visual aspect made it interesting, so more people sat down to discuss than would have done otherwise. They were open about real issues. In addition, this participatory research tool had both visual and verbal impact. In some way policy influence was happening at the grassroots level, with members of the focus group discussing health and sanitation problems and suggesting ways to implement solutions to these problems; they were the decision-makers. It was encouraging to see them refraining from pointing out what the government needs to do, and instead coming up with self-driven solutions. This is the most important result."*

The youth data collectors received further guidance during the second training visit; extending their understanding of participatory video as a staged process, with different relationships and dynamics built as you take the video-making and screening into different spaces. Following on from the film on sanitation, the team storyboarded a narrative addressing insecurity issues, and collaborated with the Real Time crew to record the story.

Becoming advocates for change: shifting self-perceptions and community relationships

The PV project has positively reinforced the youth data collectors' self-perception; a number of them do view themselves as social change actors. Thuo Wanjiku, a data collector from Spatial Collective, suggested that they were viewed as the 'watch tower' of the community because they had created a platform for the community to voice their problems. As Charles Juma shared in a reflective workshop, the impact of the PV process on his own self-confidence and belief was significant:

> *"I am seeing myself as a peer educator and an ambassador, and last like I'm somehow advocating for the people. You know, we are using this video like it's a tool for voiceless people so I'm seeing myself as somebody with a role to create within the community and society. Somebody asked me 'what have you done for Mathare as you were grown here, born here?' and I would tell someone about this. I feel great and I look forward to doing more."*

Furthermore, the youth data collectors are proud about what they have achieved, and are very happy about their video being screened in New York for global decision-makers to learn from. They are also very excited about one of their own, Purent Oduor, being the face of Spatial Collective at the exhibition.

It could also be said that the community views the youth data collectors as advocates of change – as respectable, as doing something important. Nevertheless, the youth data collectors feel that it is difficult to assess the true perception of the

Responses to Spatial Collective's participatory video on health and sanitation showing multiple viewpoints

Respondents story in video	Comments by PV researchers after watching the video	Community forum member after watching the video
Female Stall Holder: *We live in the middle of raw sewage and open drainage system. It is very difficult when a customer comes to buy food.* **Gentleman:** *The health issue is very bad as you can see. Long time ago life was not like this, but because of overcrowding life has changed. If the government or someone can donate culverts, we can be able to improve the sanitation situation on our own.*	**Angeline:** *Community members know the real problem and how it can be solved. They suggested closed culverts should be built in the community and the community will contribute towards improving the condition.*	**Ndivo:** *Youth should be given projects to clean the community like collecting garbage. I believe we can reduce diseases if we keep our area clean. People living around open sewers need to unite. If 100 or 200 people unite with this common aim, then they will achieve their objectives.*

community towards the research process and the Spatial Collective team members as social actors. This would require additional follow up and adequate resources.

Roles, challenges and compromises of being involved in the *Participate* initiative

There were considerable challenges faced during the project. It had a complex and ambitious brief, yet had to happen in the limited timeframe presented by the United Nations (UN) decision-making processes. There were different understandings and expectations about the participatory video processes and production opportunities. Time was also a challenge in ensuring that the training conducted prepared the youth team adequately for the practitioner role. Jackie intended the team would learn how to run participatory video processes with other members of the community. This was not possible as they were still acquiring production skills, and needed more time to incorporate facilitation abilities. Jackie would have liked to provide more in-camera editing accompaniement, and in response Michelle noted:

> *"If the field team had practiced editing of short clips, they would have improved their skills in editing. They too felt like more time was needed, especially for the health and sanitation video. They believed that they would have done a better job on this video if Jackie had spent more time with them as she had during the development of the insecurity video. Time was definitely one of the biggest constraints."*

Jackie's second training visit was scheduled to take place around the same period as Kenya's general elections. There was some speculation about the security situation and priorities in the target areas (i.e. the process would have focused on election-related issues and not community priorities). This delayed the PV processes and resulted in a gap in training (between the first and second training).

It is difficult to explore the effectiveness of participatory video, as time and resources would have to be allocated for follow up with community members and their activities. Members of the field team felt like they had only begun the process, and would only achieve success if actual changes occurred in the community.

Implications

Ongoing support to strengthen processes

PV is characterised by various practical stages of the process. Separation between the PV processes to build capacities and understanding, and producing material directly for advocacy is crucial. Training for

Young people in Mathare slum, Kenya made films to explore the issues in their community

local practitioners requires time for multiple cycles of concentrated input followed by practice. Furthermore, training that allows time for accompaniment during key stages of participatory processes as local practitioners apply new skills is more likely to be effective. In this regard, Jackie noted:

> *"Ideally, participatory video training would include working alongside people to help them put the skill s into practice. In Kenya, there were two training visits, but really we needed three or four or more. Due to other Participate commitments, the number of visits and the time available for each was limited. I was also working with two different organisations in Kenya, i.e. Spatial Collective and Seed Institute, which restricted input to each. If the time constraint was not present, perhaps we could have taken them further."*

Importance of building working relationships

Inviting stakeholders such as area leaders to engage in PV research activities and discussions with community members would give greater understanding of multiple perspectives. Future work should consider building on working relationships to engage local leaders further and perhaps enhance their accountability. In addition, resource allocation for follow up of community activities after PV research activities could be effective in measuring change in the community.

Strong relationships are essential to negotiating the tensions that inevitably emerge in the PV process – in this case it was the strength of the relationship between Real Time and Spatial Collective, built during the accompaniment process, which allowed them to achieve what they did, even within the limited timeframe.

How did the Ground Level Panels catalyse change?

Natalie Newell

The *Participate* Ground Level Panels ❶ (GLPs) created a participative space for people living in poverty and marginalisation to deliberate what is needed from the post-2015 global policy process. These panels gave a unique insight into how development is experienced, what needs to change, and how change must happen if it is to be sustainable. Each panel came up with recommendations for what is needed in global development policy for it to be transformative. All of the Ground Level Panels presented recommendations at outreach days to decision-makers responsible for shaping local, national and international development policy.

The Ground Level Panels took place in Egypt, Brazil, Uganda and India. Each panel comprised a group of 10-14 people with diverse and intersecting identities including urban slum dwellers; disabled people; sexual minorities; people living in conflict and natural disaster-affected areas; people living in geographically isolated communities; nomadic and indigenous people; older people; internally displaced people; and young people. ❷ Each panel created relationships, shared experiences, connected the local level to the national and international development contexts and provided a critical review and reality check on the five transformative shifts as outlined by the UN High Level Panel. The reflections and learning from the Uganda Ground Level Panel ❸ is the case study for this paper.

Empowerment through grassroots participation

While the initial aim of the Ground Level Panel was to contribute to global policy space and the post-2015 agenda, throughout the process there was significant power in the policy changes at a community level, and the impacts on individual panelists, themselves. The panelists gained a lot in terms of understanding more about the development of their communities, their country and globally; and feeling that they were able to have a voice in the national political space. As a result many of the panelists felt empowered to take action and lead development within their own communities. These small moments of change can reposition where and how policy change happens. This experience demonstrates the power of participation at the grassroots level; and that focus should also be on policy change at the local as well as global and national levels.

Namulina Annet, a 33 year old Ground Level Panelist from Mayuge District shared her experience:

> *"I feel more relevant as I have an opportunity to share and speak for others who may feel the same. It is a new chapter in my life. What I have*

Ground Level Panels used creative expression to build a vision for development from the local to national to the global level

> *taken out of this is the importance of unity and team work to discuss our issues with people of different regions of Uganda, cultures and different tribes but discussing crosscutting issues. It's not common to find people of my nature… participating in such a high level consultation…I initially thought that I would not be valuable in the discussion as I am not educated but having been allocated with a translator for the first time in my life, I felt important. I went back and told my five children to take education seriously after my experience…I shared my experience with colleagues back in the community as well."*

Lopuwa Peter, a 31 year old Ground Level Panelist from Moroto District buys and sells cattle to neighbouring communities in Karamoja:

> *'I got a voice to talk to decision-makers at Parliament. I like the fact that all information and ideas that we came up with are documented and can't be lost and this is good for learning purposes in the future. I also appreciate the fact that I was able to meet and dialogue with decision-makers and interacted with people from different communities in Uganda. I have learned and got knowledge about leading development dialogues in my community and the value of dialoguing with leaders as well as the importance of cooperating with development partners… I plan to share my experiences with my community…'*

Panelists shared that the Ground Level Panel increased community ownership and collective responsibility of the development process and created a feeling of power and the possibility for change at the community level.

❶ Find out more about how the *Participate* GLPs created a space to deliberate HLP proposals for a post-2015 global development framework from ground level perspectives, (www.participate2015.org/ground-level-panels/) and read the synthesis report of the outcomes of the four GLPs (www.participate2015.org/publications/ground-level-panel-synthesis-report/).

❷ For further insight into the GLPs, see the reflection by Danny Burns in Contribution 2.2 Participatory Approaches and the Policy-Practice Interface.

❸ The Uganda Ground Level Panel was hosted by Restless Development (www.participate2015.org/ground-level-panels/uganda-glp/).

Empathy and relationship building for collective action

During the Ground Level Panel process there were two key moments of when the participatory approaches elicited empathy. The first was between the panelists themselves. The process enabled the panelists to connect with one another, understand cross cutting issues across their communities and regions, and feel connected as people and Ugandan citizens. The investment of time and space for panelists to understand each other and build relationships generated empathy across the panel members that led to a feeling of needing to do something after hearing panelists' stories.

The majority of the panelists had not even heard of the existence of the Batwa people who were part of the panel. The panelists were particularly moved by the situation of the Batwa that this halted the Ground Level Panel discussion so that other panelists were able to ask questions to learn more. Some other panelists pledged to help the Batwa get compensated by the government and to have a representative in parliament. One particular panelist, Richard Zimbehire, 35 years of Kisoro District, reflected that before the Ground Level Panel experience that he felt that his life as a human being was worth less than the gorilla due to the history of the Batwa being forcibly removed from their land and killed to make way for tourism. He shared that due to the Ground Level Panel Process that he now felt more like a human being as he could contribute and be involved in such a discussion; and that someone uneducated like him had been asked his opinion and was being listened to and heard. After the Ground Level Panel he felt that he connected with other people from across Uganda, and he learnt that they are also feeling hardship like the Batwa.

The second example of empathy was at the interaction day during the Ground Level Panel presentation at the Ugandan Parliament. In small rotating discussion groups, panelists presented their Ground Level Panel response and key messages on the UN High Level Panel transformative shifts. This interactive way of sharing led to the parliamentarians requesting more time to hear more from the panelists about their situation and personal experiences, and gave the panelists control and ownership over the content and process. This approach shifted power at the beginning of the dialogue from the audience to the panelists. It increased dialogue, built personal connections and raised the demand for more engagement with such panels for decision makers. While eliciting empathy is important; we learnt through the GLP that it is also crucial to avoid viewing a person as a victim, not recognising their strength or their meaningful contribution to development.

Challenges and risks

The major challenge for the Ground Level Panel was the lack of time available for the preparation stages. Despite the interaction day at Parliament, there was a lack of time to scope out what was actually taking place at the national level in regards to the MDGs and post-2015 process; and there was not enough time to really engage and develop rapport with key decision makers. More time was needed to follow-up with both decision makers and panelists to assess impact. More time was also important to recruit the 'right' panelists. The criteria we collectively established for selecting panelists stated that they should not be informal leaders but should be persons that could voice their feelings and participate; and the lack of time for recruitment may have excluded the most marginalised.

The implications for implementing a Ground Level Panel are that it is essential to ensure that there is enough time and resources for:

- recruitment of appropriate panelists in each target region/location;
- engagement with decision makers at all levels;
- meaningful follow up activities.

In addition, hosts have an obligation to ensure that the Ground Level Panel process is participatory and enables in-depth dialogue and discussion. To achieve all of this effective working relationships with diverse partners such as, the PRG members, the *Participate* team at IDS, is necessary; also the government and management of expectations and demands or lack of responsiveness.

Conclusion

What defines the success of the Ground Level Panel? Is it the response of the national government or within the UN process, or is it also influence on policy at the local levels? The Ugandan experience demonstrated the importance of the local level. It is important to be clear with all involved about what can realistically be achieved from the GLP process. This includes considering the strengths and weaknesses of this approach, and what it can add to the policy debate. From the perspectives of those that participated in the Uganda process, the changes at the community level and for them as people were an important success.

Drama allows for creativity in storytelling approaches and helps bring them to life

Digital storytelling for transformation

Gill Black and Pelagia Tusiime

Digital storytelling (DST) is a creative, participatory audio-visual process that brings people's stories to life through the use of digital technology (Lambert 2013). [1] A digital story is a short (two-three minute) film sequence made up of static images that is consciously prepared and told as a first person narrative, from the heart. The tools and methodology applied to the DST process have continued to evolve over the past 10 years and it has become an increasingly popular approach for development practitioners to work closely with community members. It is a way of gaining deeper understanding of the multiple and complex ways that people's lives are affected by their most relevant social issues. The process is carried out with the intention of building new knowledge, skills, connections and self-confidence for the storytellers.

Through the DST method, facilitators engage workshop participants in a variety of interactive techniques such as creative writing, storyboarding and role-playing, which enable the identification, refining and visualisation of the individual stories, distilling what it is the storyteller wants to say and how they want to say it. Participants are encouraged to voice their knowledge and understanding of the issues being addressed, as well as their hopes, fears, joys, challenges and frustrations – in their own way, without intermediaries.

Participate sees DST as a method that works on three levels: the personal, the collective and the social. The process invites participants to explore their personal experience through a creative and expressive lens,

and many have experienced DST as empowering. The collective process of sharing honest emotions, being reflective and working creatively builds a bond between participants that enables both personal strength, and also the identification of collective challenges to be overcome. The social level relates to the way in which the deeply personal stories bring to attention the real challenges of living in marginalisation and poverty and potential strategies for positive social change.

Depending on the wishes of the individual storytellers, their videos can be shared publicly. How this happens, and to what audience depends on the aspirations of the storyteller, and whether they are connecting into a particular social change process. They may be shared globally over the internet, with fellow community members at local events, or more intimately with their friends and family. Or not shared at all beyond the workshop space.

The application of DST is far-reaching; the resulting stories can be used, for example, to evaluate learning, generate research material, and spark discussion and debate at local, national or global levels. Collective viewing of digital stories can be an effective approach for inducing reflection and action of community actors, organisations and institutions. They can also facilitate the understanding of policymakers. In *Participate* we have used the DST method to inform high level policy debate through the display of some stories in the exhibition presented in New York. [2] [3]

This chapter presents the reflections and learning of two development practitioners that have worked with community members from urban South Africa and Uganda on projects related to tuberculosis and HIV and urban health inequity.

[1] Lambert, J. (2013) *Digital Storytelling: capturing lives, creating community,* New York: Routledge

[2] For further insight into the *Participate* exhibition 'Work with us', see the reflection by Catherine Setchell in Contribution 2.2 Participatory approaches and the policy-practice interface.

[3] Find out more about 'Work with us', An exhibition of stories from people living in poverty and marginalisation around the world, demonstrating their visions for change in their communities (www.workwithus2015.org/).

Reflections from a South African perspective

Gill Black

Who told the stories?

The DST project that was implemented in South Africa by the Sustainable Livelihoods Foundation (SLF) engaged seven members of the Delft Community Help Campaign (DCHC) focus group. The township of Delft in Cape Town has a high incidence of tuberculosis (TB) and HIV co-infection and is also a hot-spot for the transmission of multi drug-resistant TB. The DCHC are dedicated to the development of innovative and culturally appropriate tools and methods to enhance awareness, reduce stigma and aid the prevention of TB and HIV/AIDS within their community. SLF partnered with the DCHC to achieve their aims by engaging with the focus group through a variety of participatory methodologies and activities. The DST project enabled South African citizens to express their personal perspectives of living in a vulnerable township where poverty is exacerbated by the ongoing transmission of infectious diseases that marginalise people from society.

What effects did the stories have and how were they used?

At a micro-community level, the SLF DST participants themselves were impacted in different but significant ways by their short film-making experience. For example, Siphokazi explained to me that she had never previously had the opportunity to talk so openly and honestly about her mother's illness and death due to HIV/AIDS, and how it had affected her personally. Although sharing her story was a painful and emotional process for Siphokazi, [4] she said it brought her a sense of relief and strengthened her passion to help young children orphaned by HIV.

At a broader community level, a selection of the DSTs were shown on two separate occasions in Delft in August 2013. Both events were aimed at increasing awareness about TB and HIV in the township, and focused specifically on aspects of family support and treatment adherence. The first event was tailored for a youth audience, and the second – held one day before Woman's Day in South Africa – was designed to engage women. At both events, the stories triggered lengthy discussion and debate amongst attendees. The fact that the stories came from within their own community (the DST participants were known to some audience members) clearly influenced people's connection with their messages and desire to respond to them.

Going through the DST process fostered agency and empowerment within the DST participants who continued in their campaign to fight the TB/HIV epidemic. Following on from their DST experience, the focus group members became involved in a six-month participatory drama initiative where the content of their digital stories formed the storylines for two plays that they themselves performed to an audience of over 2000 community members during 2013, including two World AIDS Day events.

How did the process work?

As one of the DST co-facilitators for the SLF project, I learned that sharing my own digital story with the people I asked to tell theirs contributes to bridging the trust gap in a DST workshop context; showing the participants that the facilitators are human and vulnerable people too. After watching the personal digital stories of the three DST facilitators on the first day of the workshop, one of the community participants commented "Don't judge. You don't know their background."

I observed that the DST participants from Delft moved through the workshop process at different rates. Some group members identified their stories quickly on the first day, whereas others took two or three days to unearth what it was they wanted to share. Enabling participants to find their stories is a process that cannot be rushed and there is a correlation between the patience of the practitioner and the empowerment of the storyteller.

In terms of technical methodology, tablets are less intimidating than laptop computers for producing videos because they work on a simple touch and swipe principle, which is easier than figuring out how to navigate a QWERTY keyboard and manipulate a cursor. By using tablets, the DST participants – most of whom had no prior exposure to this type of technology – enjoyed a full 'hands on' opportunity for unique creativity in the production of their stories. The SLF team used iPads and 'apps' in the DST process for the first time on the *Participate* project, which provided a valuable learning curve for both the facilitators and the DST participants. Breaking this new ground did have an impact on how far the team got by the end of the five-day workshop, and consequently the final edits (e.g. translation of the narratives) had to be made outside the workshop space. Although this editing was done by one of the DST participants and SLF team members who had attended the DST workshop, the 'external editing' felt like a compromise to the participatory nature of the process.

The role of the facilitator

I found myself wearing multiple hats in my role as co-facilitator of the Cape Town workshops, including participant mentor, social science researcher and technician. After the week-long workshop came to an end and the digital stories were completed, I reflected on how my role morphed into that of an activist and advocate. My experience has taught me that a DST

[4] See Siphokazi's own digital story which conveys fear of stigma of HIV/AIDS in Cape Town, on the *Participate* Vimeo page (vimeo.com/70481515).
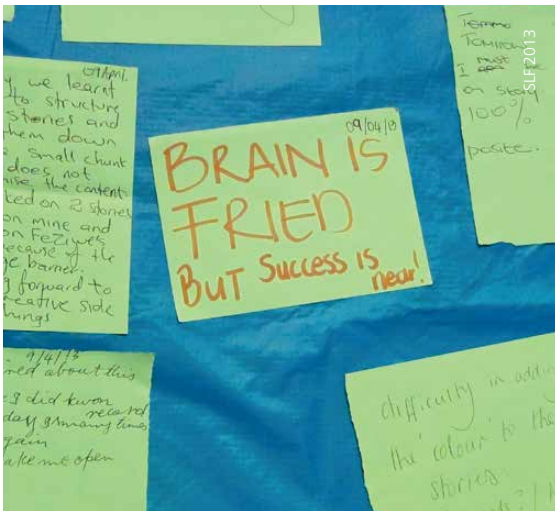
Digital storytelling is a powerful self-reflective process that asks participants to share memories and emotions with honesty

practitioner needs to be flexible. Finding a balance between the practicality of getting all the short videos completed within the available time frame, and the sensitivity of allowing participants the space they need to create their story as they want it to be seen and heard, can only come with practice and reflection. The approach and process to obtaining consent is key to fostering a trusting relationship.

Reflections from a Ugandan perspective

Pelagia Tusiime

Who told the stories?

The Kawempe action research on slum health issues and health research engagement by HEPS Uganda, engaged community members to explore their health priority issues, share experiences in engaging in health research and learn ways to collect, analyse and share their own research on their own health priorities. The project aimed at promoting community members to engage with each other, local authorities and policymakers to increase the visibility of health needs and their perceptions of health research in their communities using DST. Community researchers created four digital stories around the health work and their own perspectives in the slums.

What effects did the stories have and how were they used?

The biggest problem community members identified in a mapping exercise at the start of the research was their invisibility. Passersby do not see the slums they drive by, or the residents busy within it. Researchers see disease patterns and people as clinical subjects. Officials falsely presume slum dwellers can access services because they live close to hospitals. NGOs generate reports about slum problems that do not get read by people who will act.

In July 2013, HEPS Uganda held a large community theatre for development event in one of the urban slums targeting youth, women, men and local leaders. Four stories were shared before the presentation of the play about the health priorities of residents from the slums. The stories were made by the very people who are part of the drama and also living within the slum area. The audience got excited and raised a number of opinions on how to solve the problem. This equally indicated to me that it is worthwhile sharing stories made by local people to elicit trust.

Gilbert, who lives in the slum, shared his story during the drama presentation in Katanga community. [5] He expressed how he is confronted with multiple issues and daily challenges that impact on his health and wellbeing. This includes: a lack of infrastructure and limited public services; an unhealthy environment; the poor management of waste; inappropriate housing; food that is unsafe to eat; and insecurity in livelihoods opportunities, amongst many others. People are forced to live their lives at risk of ill-health as what they can afford means that they are navigating unsafe environments. There is also a stigma attached to these settlements which Gilbert faces in wider society; this has caused him to feel shame and embarrassment in his life about where he is from.

Gilbert's story shows clearly that people are working hard to improve their own situation. A community-led initiative to recycle waste for income generating purposes has provided a platform for improved wellbeing for him and his community; he feels productive and valuable. Hence, supporting appropriate livelihood schemes, based on the needs, creativity and resources available to people builds ownership of these initiatives, making them sustainable. Gilbert places emphasis on the positive impact of the digital story telling initiative on the development of his community, in particular how it is changing the environment around him. The storytelling process has also helped transform Gilbert's negative perceptions of Katanga, and there is an opportunity for a shift in the perspectives that the wider society have towards people living in slums as well.

Another story was shared by Viola who had been living for 33 years with HIV/AIDS but, fearing rejection from her relatives and the wider community, refused to seek medical treatment and advice. Her story demonstrates how unawareness of the causes and consequences of HIV/AIDS can result in social neglect, home eviction, and isolation; all of this moving Viola and her children into deeper levels of poverty and marginalisation. It also portrays the powerful role that local community volunteers and networks can have in the provision of medical, emotional and psychological support needed when living with HIV/AIDS. Viola declares that "disclosure saved her life"; but disclosure is not enough and it can amplify hardship if Antiretrovirals (ARVs) and clinics are not accessible to the poorest, if social norms that discriminate are not

[5] Gilbert's digital story about 'Life in Katanga' can be viewed on the Participate Vimeo page (vimeo.com/71497605).

challenged and if there are no livelihood opportunities available. Her story left many in tears and also inspired others into being part of the community volunteers.

Donors think that health problems are worse in rural areas. Slums become visible to the media mainly when something sensational happens. Being poor in the poorest slum in Uganda means being invisible in plain sight of power, wealth and millions of fellow citizens. Digital stories methodology can be a powerful and empowering way to tackle this invisibility by the slum dwellers themselves. It is a powerful way to convey people's experiences with health services and the impact on their lives which is likely to encourage a more socially accountable form of urban slum development which involves citizens in an evaluative role, and supports citizen action for social change.

The process and the role of the facilitator

During the DST, I was the lead facilitator and I was one of the people taking recordings from the people who participated in generating the digital stories. Taking a story in a local language and interpreting it into English was a little challenging as was making people understand the methodology itself. The methodology requires a number of activities to make sure it captures that message that you want to hear.

We identified people to come up with their personal stories at the same time as a number of photographs in communities had been taken, so we had a number of photographs to use to match people's stories: as these people were slum dwellers, we wanted them to select the appropriate photos that they thought suited their stories.

When you are doing these kinds of stories, where you are required to use more than one tool, you need to be working with someone alongside you. There are instances where I found myself managing alone but I felt it was really constrained so it requires more than one person because you do a lot of multi-tasking.

Challenges and compromises:

A conversation between Pelagia and Gill

A conversation between Gill Black and Peggy Tusiime focused on the challenges and compromises involved in their respective experiences with DST:

Helping participants to understand the methodology within the time available was a major challenge:

Peggy: *You realise during that time when we were generating these scripts and digital stories we felt like we needed to have some stories captured from the community from the slum dwellers for us to be able to get out at least the voices that can be represented at that global level, to see how well that this can give an impact. We were given limited time so maybe*

that could have been the challenge, but I feel like we needed a little more time for us to engage into this with the people exactly that are meant to be generating these stories. Limited time will not give us a good output in the end.

If you have limited time and you do not get time to go through all these for them to be able to understand the purpose, why we are doing this – and then you only just make the compromise on the process – they will miss the point.

And remember the category of people, and this requires complex technology, so you need to have it at a pace that you see that these people also can take in.

Gill: I understand what you're saying. It's more to do with the purpose and explaining to people why we are doing these digital stories, what power and what impact they can potentially have. And to give the participants an idea of the type of audience they are potentially going to be engaging with through their story.

The issues of language, translation, and interpretation also raised a point of resonance:

Peggy: *Most of the participants were more of local speaking community members, and so we had to ensure that the scripts were translated in English. So I had to do that and you know when you do that you really need to be so careful and be sure that you are not changing the meaning of the script.*

What happened is they wrote the digital stories in Luganda, I interpreted into English with Luganda subtitles but all the scripts were narrated in English.

There is no way we can avoid interpretation (through translation). The fact is that we are interested in hearing the poorest and most marginalised people in communities and we are not only going to look out for those who can speak English. I think it's OK, capturing people's stories and then finding a way of how to communicate the stories in English or maybe in a language that can be communicated for wider sharing, because you cannot easily present a script in Luganda one of the local languages here in Uganda to the UN forum.

Maybe what could be done differently is recording the stories in the local language the way they are being said and then we have the English version. When it comes to the utilisation of the scripts at the local level it is suited enough for use, then when it gets to the global level, there is that other (English) version that can be shared.

Gill: So going forward, you would do that differently, and you would allow people the opportunity to speak…

Peggy: *Yes, to speak in their own language where they easily express what they want to express, and have the script in the local language, and it will probably be interpreted at a later stage where it's required to be interpreted.*

Gill: Three of the seven South African digital stories were read by the storytellers in a local language other than English (one was in Afrikaans and two in isiXhosa). In order to generate subtitles, these three narratives were translated into English by bi-lingual DST participants and an SLF team member.

The deeply powerful impact of Siphokazi's story 'Inkedama' ('Orphan') on its viewers is largely due to the confidence and intense passion with which the storyteller speaks, a passion that is strengthened through the use of her mother tongue.

Peggy mentioned a tension that developed around the expectations of participants regarding payment for the use of their stories and photographs.

Gill: 'It is always a difficult issue to deal with and it can be painful and upsetting for everybody involved. At SLF we have learned that, right from the beginning, you have to be very clear with project participants around issues concerning money and what they can and cannot expect from taking part. This transparency helps to ensure that everybody has the same understanding from the outset and that there are no misconceptions of payment for participation, when there usually isn't anything in the project budget to cover it. If people still want to be involved in the project, that's great, and if they don't you have to accept their point of view and let them go. I have learned that being up front about payment is one of the most important aspects to sustaining a good relationship with communities and participants'.

Peggy: People have high expectations when they realise that you want to use their story and where some of their photos appear, their expectation is that some of them were actually expecting to be paid for their story to be used and at that time we were losing some of those that had high expectations and probably going with those who have the spirit of realising that this is something that is to be utilised for advocacy or probably see how well we can communicate it to people out there to be able to improve the situation for others.

Asking the participants what they would like to do with their story when it is finished helps to support them in the narration of their stories, as they can now envisage an audience with whom they want to connect. A major aim of the *Participate* initiative was to use the outputs generated through the various visual processes to engage policymakers on a global platform. Peggy and Gill agreed that they faced a similar challenge in finding sufficient time during the workshop activities to adequately inform the participants about the potential high level use of their stories.

Gill: I wonder if the South African participants had fully realised their opportunity to engage with world leaders about the impact of TB and HIV on the day-to-day realities of their lives? If this had been more strongly emphasised, would the participants have approached their story differently? Would this knowledge have further empowered, or intimidated them?

Peggy: The depth of a story can come out even in a short time, but my focus is on really making people appreciate the methodology, because to me I believe that making people appreciate it, that would have even called for more participation. But the moment people do not appreciate they will only give you their story just for the sake of it. [5]

Participatory action inquiries in Bolivia and Bangladesh

Walter Arteaga and Lipi Rahman

Action research has never been a unified approach to inquiry. It has, for example, been developed as a tool for organisational learning; as a critical and emancipatory community learning process pioneered in the global South through the work of Freire, Fals Borda and others; and a variety of other interpretations. [1] Figure 1 shows a common version of an action research cycle, which entails planning for acting upon the issues raised during the observation and reflection stages.

Whilst all of the research in the *Participate* network work has been conducted using participatory methodologies; some organisations have also undertaken action research processes. The majority of processes, such as those in Bolivia and Bangladesh, can be defined as 'participatory action inquiries' that
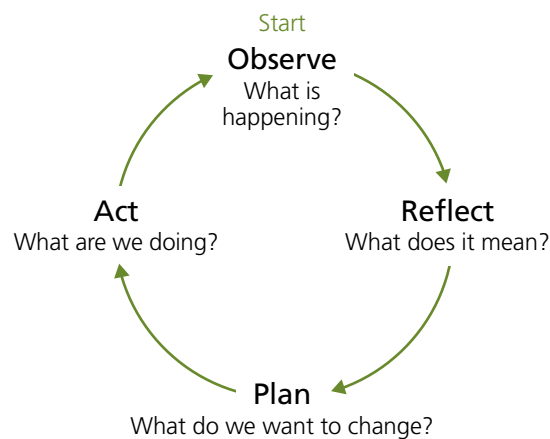

Figure 1. Common interpretation of the action research cycle

allowed people from extremely poor and marginalised backgrounds to identify and reflect on those issues that affect their lives and identify prospects for positive change. These inquiries used a variety of tools and methods in order to engage with different vulnerable groups of people; in rural and urban settings, in order to identify and test actions that they thought could improve their situations.

[5] SLF (forthcoming) *Participatory theatre for development approach results in measured increase in TB, MDR-TB and HIV knowledge within a vulnerable South African township*, Cape Town

HEPS-Uganda (forthcoming) *Tackling the urban health divide in Kawempe Urban slum*, Kampala

[1] Burns, D. (ed.) (2006) *Action Research for Development and Social Change.* IDS Bulletin 43.3, Brighton: IDS

The meaningful engagement of groups affected by poverty and marginalisation in participatory assessments of poverty is particularly relevant and should be complementary to the data derived from quantitative studies. The participatory approach allows participants to conduct critical analysis about their access to productive resources, employment, social security and social protection, and the scope of their social and political participation. In other words, this is an in-depth reflection of the main factors that affect the processes of social inequality and production-reproduction of poverty. Since these factors are generally placed in second place in other inquiries about poverty, the contribution of the participatory research is particularly relevant to national debates and the global policymaking context.

This contribution is based on reflections from participatory inquiries in Bolivia and Bangladesh.

Participatory inquiries in seven municipalities in Bolivia

Walter Arteaga

UNITAS (National Union of Institutions Working for Social Action) is a network of civil society organisations (CSOs) and community based organisations (CBOs) in Bolivia that works on a wide array of issues; in the last 18 months prior to this anthology we have been engaged in the process of developing a post-2015 development agenda through a variety of activities, such as campaigning, coordinating national level consultations and conducting in-depth participatory research to inform the debates. In our perspective, the framework for the implementation of the Millennium Development Goals (MDGs) has privileged quantitative methods to assess the conditions of poverty. The greatest limitation of these methods is that they do not provide information about the relationship between the persistent situations of poverty and the productive, socio-cultural and political contexts of those who live in poverty.

The study in Bolivia took place in seven of the poorest municipalities of the country in both urban and rural settings. [1] The study explored the perceptions of the causes that generate the persistence of poverty; the visions and ways to overcome poverty; and ways to ensure communities' participation in policy making and following up on policy implementation (i.e. accountability mechanisms and citizens' oversight processes) and the expectations of social change. The criteria to select the participants were based on their role in the labor market by occupational category; their economic activity and/or their condition of unemployment and inactivity.

Transforming conditions of poverty

The participatory approach implies the transformation of the conditions of poverty affecting the poor: participatory research in Bolivia identified the expressions of the poverty associated with those who live in poverty in contrast with those who live well in the neighbourhoods and communities targeted by the study.

The de-naturalisation of poverty is part of the analysis that involves identifying the causes that generate poverty. In this analysis, the participants had difficulties identifying the structural causes of poverty. However, the participants selected topics that can contribute to the elaboration of alternatives and strategies for action that could change their situation.

It is important to mention that participants agreed that the changes in their situations involve the individual and family levels. They also believe that the transformations required will be sustained only with the implementation of domestic public policies. Participants evaluated policymakers' performances, taking into account who or what interests they represent. These interests were identified with people who live well because these interests coincide with political parties or powerful individuals.

Transforming relationships

Participatory research in Bolivia worked under the premise that the people who attend the workshops are subjects of individual and collective rights; however, they are in a constant struggle to be recognised as persons and communities subject to these rights. Therefore, the interaction between development practitioners and the participants is political, because their situation is understood in terms of domination and exploitation, discrimination and exclusion that other social groups exert over them. Consequently, participatory approaches and methodologies address the political debate about the inclusiveness of development.

The conditions necessary for transformation are in people, themselves; and, in their organisations. Participatory research highlights the ways the poor and marginalised people organise collectively to express their power within and their power to address its demands, so that the capabilities for the transformation are in their organisational resources, which the facilitators try to visualise and reinforce.

The role of empathy in the participatory research

Participatory methodologies generate empathy when the interaction is horizontal and contributes to the collective construction of knowledge based on the interests and values of the participants. In the same way, participatory approaches generate empathy between different groups. When the learning and the construction of knowledge transcend particular problems, it is feasible to generate a shared sensitivity that makes possible actions of solidarity with people in similar conditions and/or identifies other players to build alliances with. Finally, empathy is generated when the interaction between the practitioners and

Participatory learning exercises were used in Bolivia to explore the causes of extreme poverty, and possible solutions

the participants reveals social dimensions – gender for example – in order to capture the specific situations that affect the participants.

Risks and challenges

The risk of this type of interaction is to idealise the concept of being poor. This idealisation hides contradictions and power relations among them. Also, we risk incorporating the practitioners' ideological criteria in the collective analysis of the participants.

Our challenges are focused on the continuity of the construction of knowledge and the implementation of the participant's strategies and actions.

Action research process with older people and people with disabilities in Bangladesh

Lipi Rahman

This research process was undertaken as part of 'We Can Also Make a Change', ❸ a pilot project bringing the perspectives of those who live in poverty or who are highly marginalised, including those with disabilities, older people and people living with mental health problems, into post-2015 policymaking. The process in Bangladesh was undertaken through a peer-research approach, which is a form of participatory research. The researchers are people rooted within particular constituencies or communities and they are supported to conduct research with their peers.

How the process worked

The community peer researchers were people with disabilities and older people from two communities, Bhashantek slum in Dhaka, and from the Jhilonja area of rural Cox's Bazar in the South East.

The Bangladesh Non-Governmental Organisation (NGO) peer researchers were people who work with people with disabilities and older people in local NGOs. These people were selected because of their direct experience of poverty and/or exclusion (and for gender balance). All the peer researchers helped to design the interview prompts and identified peers within their communities or constituencies to interview and collect experiences. They were also directly engaged in analysing the data and actively participated in the writing of the findings report, which they decided to name 'We can also make a change'.

The research process involved action researchers the community level, and peer researchers drawn from development practitioners. During the workshop, the researchers shared their feelings, knowledge about how change happens and how this relates to exclusion. The groups (the peer and action researchers) have common findings on marginalised people and where and how to influence policy at local and national level.

During the workshop the participants also prioritised the issues people with disabilities and older people are facing, and discussed how these issues can be brought to influence policymakers at different levels. The participants also had an understanding about the MDGs and different policy implications and their results for marginalised people.

The participants felt empowered through the process because they were involved directly with the process of research. The organisations who were involved in implementing the research learned the method of participatory processes too.

How the research was used

Beyond the local level, this research has been used to influence policy at other levels. Stories by older people and people with disabilities were shown in the exhibition in New York. I was invited to speak on behalf of HelpAge and Sightsavers at the UK parliament with policymakers.

But I believe the most important part of this research was the fact that real people were involved as researchers. Both the researchers and the researched could speak freely about the world they want. We followed a method developed by the researchers themselves in collaboration with our colleagues from the Institute of Development Studies (IDS), and followed a set of non-structured questions allowing our respondents to talk uninterruptedly about their lives and challenges.

The older people and people with disabilities and the peer researchers who participated from different organisations mentioned how the stories moved them and made them more sympathetic towards their own community members. They also realised how marginalisation and exclusions affected their lives.

Risks and challenges

The main challenge to working with action researchers was to bridge the gap. Initially the action researchers saw us (the peer researchers) as not one of them, as we came from different backgrounds. But during the workshop, the storytelling process brought out common issues and filled the gap. The process made them feel able to be a representative from their own community, which made them more committed to the whole process.

Conclusion

Becoming involved in a participatory project of this nature involves developing a deep understanding of people you will be interacting with, speaking to and hearing. You work as a methods practitioner, a researcher, an advocate and an activist. These are varies roles and fitting into each of them can provide a challenge. It's also about finding a balance between keeping the process on track while ensuring that any filtering is kept to an absolute minimum.

2.2 Participatory Approaches and the Policy-Practice Interface: First Person Narrative Reflections

Collaborating at the process – product interface in film-making

Clive Robertson and Jackie Shaw

'Work with us' is a documentary film [1] produced by Real Time [2] as part of the *Participate* initiative. Our documentary production role involved film-making collaborations with ten Participatory Research Group (PRG) partners and communities in seven countries, to bring together some of participant's research stories in a visually compelling way to broadcast standard. This aim was to show the reality of poverty to United Nation (UN) policymakers from the perspectives of some of the poorest and most marginalised people.

The film's purpose was not to summarise the research conclusions, or be generally representative of life in poverty. It was to use actual experiences to make a case for why dialogue with marginalised groups is needed, how participatory processes can generate missing contextual insight, and how this contributes to the policy agenda in building more equitable working relationships. It is therefore important to recognise that we, the Real Time film-makers, were tasked with producing a documentary with a policy focused meta-narrative, and this directed production activities. This is different from our participatory

research accompaniment role, which involved in-country support for local practitioners, producing their own stories through participatory video processes. However, the stories communicated in the film emerged from the PRG partners' participatory research processes, and exemplify the importance of their knowledge for development decision-making.

From the beginning we intended that the documentary would be co-constructed with the groups we visited, and focused on the stories that people wanted to show and tell. It would place them at the centre of communications by filming them where they live, speaking directly to the audience in their own language. This was different to the typical film-making dynamic, which might only involve people in line with an outside producer's or director's agenda. Our starting criteria for collaboration, aimed to ensure non-extractive film-making processes, and that project partners valued the opportunity to communicate their stories in international policy space, and to support the advocacy agendas of the partners themselves.

Real Time's collaborative documentary film-making process was shaped by the participatory processes of the PRG, but the stories included in the documentary grew in different ways depending on the context. What happened during film-making responded to

[1] Watch the 20-minute documentary 'Work with us: Community-driven research inspiring change' (www.participate2015.org/2014/01/09/work-with-us-community-driven-research-inspiring-change/).

[2] Find out more about Real Time's work on their website website (real-time.org.uk).

Documentary film-production in Occupied Palestine captured reflections on being involved in a research project using participatory video

the needs of the particular partners, the specific activities they were involved in, and the stage reached in the research processes when the documentary visit took place. For example, with PRG partners the Seed Institute and Spatial Collective in Kenya and with Praxis in India, documentary narratives were storyboarded as part of participatory video processes accompanied by Jackie, but cross-over with film-making visits provided the opportunity to record them on the broadcast equipment to include in documentary. In comparison, Ecoweb's non-visual participatory research in the Philippines had already been completed – so Clive ran shorter participatory video processes with participants to build trust and working relationships and raise production awareness before filming.

Our intention to maximise ground level story authorship during documentary production, was reliant on the PRG partnerships, and the relationships they brokered with people living in poverty. The challenges of adapting the film-making process to context also arose in part from differences in the participatory approaches used, the stage of the research, the way the PRG partners perceived Real Time's potential contribution, and how we responded. Learning from experience during pilot documentary collaborations with Praxis ❸ in India and UAM-X in Mexico ❹ enabled us to develop practice guidance that informed contextual adaptation in later visits.

Reflecting on the implicit dynamic created by our positioning as outside film-makers, we concluded that we were more likely to engender trust and informed consent, if there was at least a short interactive process between Real Time film-makers and participants living in poverty to establish collaborative relationships before production, even on film-making

only visits. This was also important to us in fulfilling our commitment to reflect people's realities, because it gave space for film-makers and those who appeared to get to know each other, and allowed people's most pressing issues, feelings and perspectives on what was needed to emerge.

We defined Real Time's documentary making activity as collaborative to distinguish it from participatory production. We used the term collaborative in recognition of the relationships with PRG partners that enabled us to build film-making partnerships with people living in poverty, and also to acknowledge the co-construction of the resulting materials with the communities concerned. However, documentary production activities also reflected a much more typical film-making dynamic: we took on a responsibility to produce and direct the process in order to deliver a broadcast standard product communicating the meta-narrative to decision makers within the timeframe. As such, we encountered a tension: how to maintain group narrative ownership of the stories filmed, whilst maximising the opportunity to influence international policy through communicating the films wider message. ❺

Reflections on the *Participate* exhibition, 'Work with us'

Catherine Setchell

In September 2013, *Participate* held a public exhibition of the written and visual participatory research outputs in New York, for two weeks during the United Nations General Assembly (UNGA) meetings. The purpose of the exhibition, 'Work With Us', ❶ was to present the research findings in an accessible and interactive format so that audiences

could engage with the research and reflect on it in a deeper way than they might otherwise, through reading the *Participate* research report, alone.

The post-2015 deliberations of the past 18 months have been characterised by debates and advocacy positions that are driven by succinct and carefully crafted policy messages. In contrast, the exhibition aimed to give audiences the opportunity to see and hear peoples' stories in their own words, and provide deeper insights into the realities of people living in poverty and marginalisation.

The exhibition was organised around a vision for the kind of development that people want, as identified through the 18 participatory research studies. This vision includes six key ideas:

- Recognition of rights for all
- Transform social relations to enable collective action
- Accountable and democratic governments
- Promote citizen participation in decision-making
- Prioritise the creation and provision of dignified livelihoods
- Ensure development interventions are holistic

Using this vision for development as the structure of the exhibition, we collated films, photographs, and digital stories made by the communities themselves, as part of the community-led research process. We combined this with quotes, written stories, explanatory text, and professional photographs from the research, as well as a 20-minute documentary film. [2]

The exhibition was launched and hosted for the first week at the Gallatin Galleries at New York University. This was a larger venue and a good space for the launch event, which was well attended by a mix of civil society organisations, academics and United Nation (UN) civil servants. In the second week, the exhibition moved to a smaller venue, which was a short walk from the UN Headquarters, so we reached the policy audience more effectively. We also had an online exhibition where further content could be viewed from the research (www.workwithus2015.org) and a Twitter feed where audiences could interact with the exhibition (www.twitter.com/workwithus2015).

The major challenge for us during the two-week exhibition was that Member States and UN actors were extremely busy with very little available time in their schedules. As a result we felt the exhibition struggled to reach key policymakers and we were more successful in engaging other civil society actors who were in New York for the post-2015 meetings. Building these connections with civil society organisations through the exhibition was positive for consolidating our shared advocacy messages for the ongoing post-2015 debates.

On reflection, the exhibition gave us the opportunity to raise *Participate*'s profile and within a more informal space for audiences to engage with and reflect on the research than the usual bureaucratic UN forums. At the more formal meetings and conferences we attended, it was useful to have the exhibition space to direct stakeholders to, to see the visual, participatory research outputs, where they could connect with the communities' stories on a more emotional, human level. We received very positive feedback from those decision-makers that were able to attend. In particular, the United Nations Children's Fund (UNICEF) staff who attended a workshop exploring the digital stories, who had a very powerful experience. [3]

Another positive outcome was that representatives from the Permanent Mission of Ireland to the UN who visited the exhibition, later agreed to host it within the UN headquarters during two key post-2015 events in March 2014. The endorsement of a Member State and the location in the main lobby of the UN building meant the event was well-attended by Member State representatives and UN policymakers. These policymakers took *Participate* messages into the formal UN meetings taking place that week, in particular providing a platform to launch *Participate*'s proposal for post-2015 targets into the Open Working Group for Sustainable Goals process.

Bringing the exhibition to the UN policy spaces demonstrated that with appropriate timing and by accessing the relevant spaces, visual participatory processes can have an impact on high level policy debates and decision-making. The exhibition enabled in-depth discussion with a handful of key and influential policymakers around the participatory research findings and processes involved, which have directly influenced the post-2015 debates and mechanisms for marginalised groups to engage in the deliberations.

Reflections on the Ground Level Panels

Danny Burns

In 2011 it became clear that the initial global policy focus for *Participate* would be the 'High Level Panel of eminent persons' [1] (HLP), a panel selected by the United Nations (UN) Secretary General, to deliberate on what would come after the Millennium Development Goals. The idea for a Ground Level Panel [2] (GLP) therefore aimed to provide a mirror to the deliberations of the HLP but from people who lived in extreme poverty or marginalisation.

Once the *Participate* team had decided to proceed, we started to look for good examples of deliberative processes. A deliberative process is one in which a group of people meet over a period of time to consider and make judgement on an issue. The best

[2] Find out more about the documentary 'Work with us: Community-driven research inspiring change' (www.participate2015.org/2014/01/09/work-with-us-community-driven-research-inspiring-change/)

[3] See Gill Black and Pelagia Tusiime's reflections on digital storytelling in Contribution 2.1 Methods and Challenges in Using Participatory Processes in Diverse Contexts: Bridging the Gap Between Community Reality and Policymaking.

[1] In July 2012, Secretary-General Ban Ki-moon announced the 27 members of a High-Level Panel of Eminent Persons on the Post-2015 Development Agenda to advise on the global development framework after the Millennium Development Goals (www.post2015hlp.org/).

[2] In June and July 2013, *Participate* facilitated four GLPs in Egypt, Brazil, Uganda and India to mirror the UN HLP for post-2015. The GLPs comprised a diverse group of 10-12 participants experiencing poverty and marginalisation (www.participate2015.org/ground-level-panels).

known examples are Citizens Juries. Unlike other models, in the GLPs the material for discussion was to be the life experience of the participants. As such we found few deliberative processes that supported our idea and so we decided to develop our own approach.

A collaboration between four Participatory Research Group (PRG) members evolved, and we held a two day event to lay some common ground on practical and ethical issues for implementing a GLP process. We talked extensively about who should be involved. The difficulties of bringing in the very poorest was amplified by the fact that we were engaging with a written document and that we were asking people to be involved for at least a week. We concluded that it was not realistic for people living in the most extreme poverty to get involved. We anticipated that the majority would be made up of ordinary people living in poverty and who were marginalised, alongside those who take an activist role in their community, and possibly people who live and work amid the same communities but who were not as poor themselves. Most of the groups managed to find this balance, although faced different logistical, cultural and institutional challenges in doing so.

Lessons for future GLPs

These Panels were a first step. Together, we are now exploring how we can develop the ideas built on what we have learned. As a contribution, I want to highlight a few observations:

Diversity in the group

One thing that struck me was the difference in composition of the HLP and the GLPs. The HLP was made up of people largely from an elite political class. There was the odd member of royalty and a few interesting academics thrown in, but by and large they were high ranking politicians. There was very little diversity in the group, and the interests were narrow. The GLPs on the other hand were highly diverse. Slum dwellers sitting side by side with pastoralists, transgender people, and people living in refugee camps … It is easy to stereotype people as 'poor' and see them as a huge sprawling undifferentiated 'category', but they bring far more diversity than people who hold power.

Time for deliberation, interaction and development of thinking

The people in the GLPs had time to get to know each other across this diversity, and time to deliberate on the evidence. In this case the evidence lies in the relationship between the propositions of policymakers and the real lives of people. The first thing people did was really understand each other's lives. The problem with 'consultations' is that people often have 'positions' and they are not learning or generating new knowledge, or their interaction is so 'real time' meaningful engagement is difficult. Through deliberation and interaction people's perspectives change. In the Egyptian Panel uneducated women found their voice as the process unfolded and attitudes of others changed; a man involved in the process explained how he was surprised to find women participating, but was also surprised with how much they added.

Seeing the world through different lenses

The GLPs saw the world through a different lens to the HLP. The people in the Panels understood the dynamics of change facing people living in poverty and this gave them the ability to say if these policies were meaningful. While economic growth is an unchallenged assumption in the HLP for the Brazilian GLP it was seen as part of the 'death plan'. For the Brazilians the critical issue is not 'poverty' per se, but 'misery' and 'dignity'. While the HLP focused on service provision, the Indian Panel's desired goals largely focus on social norms, behaviour and discrimination.

There were some common themes which emerged in all of the Panels. People want to feel that they have meaningful control over the influences that impact their lives. In all cases structures for equal participation were highlighted as foundational. In almost all of the Panel's there was a recurring theme of 'self management'. People don't want aid. They want the means to generate and sustain their own livelihoods. So if we are serious about moving 'beyond aid' in the new development agenda then empowerment must become the priority.

Ground Level Panel participants in Uganda discussed what they mean by 'sustainable development'

Systemic participatory inquiry

Danny Burns

The Bangladesh 'We can also make a change' ❶ team, and the Ghana Community Radio Network ❷ used participatory inquiry approaches in their work. I worked with the researchers involved to think through a systemic approach to understanding how change was happening to communities and individuals. Taking a systemic approach meant that we focused on the complex relationships which interconnect the different parts of people's lives and the complex relationships between different issues within communities and beyond. In-depth narrative methods surface those relationships and helps us to understand the change dynamics within those systems. It is only when we understand these that we can create sustainable change. In the processes that were used in these examples, narrative interview methods predominated.

Systemic participatory inquiry can therefore build holistic pictures of relationships and change dynamics. These pictures enable the identification of entry points, leverage points or spaces of opportunity for action – laying the foundations for generating solutions to the issues that they identify and taking action. From my experience, communities quickly see the utility of such an approach. Policymakers and practitioners however, are often looking for simple demonstrations of the impact of single interventions then find it difficult to understand why so many of their interventions fail to work. The combination of systemic approaches with narrative inquiry methods make this understanding possible.

Narratives build systemic pictures of how change happens in communities

The narrative interviews enabled us to see two types of systemic narratives.

1. *We often discover that a story is a fractal of a wider whole, and this becomes apparent as more stories are surfaced with similar patterns.*

These are stories of more pervasive stories across communities. The Bangladesh peer research brought to light a number of these stories. For example, community researchers were able to see patterns in the many stories of rape of disabled girls. Similarly they could discern how multiple interacting factors had resulted in rapid changes in social norms around relationships with older people. Dissonances and tensions also emerged from the stories, which enabled sensitive issues to be explored. In the Bangladesh example, an opportunity for discussing the issue of rape was opened up when community based organisations (CBOs) shared stories with community researchers on the issue.

2. *There are other stories which collectively or individually describe and explain what is happening to a whole community.*

The stories from Ghana traced the complex relationships between climate change, crop failure, family breakdown, migration and women's land rights. They depicted a repeated dynamic. Once we understand how change happens to individuals and communities it is possible to think about how to intervene. Once we know what the deeper system dynamics are it is possible to create change which is sustainable.

Open ended questions produce new knowledge

These research studies took an open ended approach to inquiry. Researchers didn't ask questions like "do you have difficulties in accessing disability benefits" or "have you faced discrimination in your attempts to get employment" (these have pre-constructed issues which the researcher sees as important). They asked questions like "tell me a story about something that you find difficult in your life" or conversely "tell me a story about how you have managed to overcome difficulties …". Such an open process allows unsolicited information, and is likely to generate new knowledge because it is not shaped by what a researcher already knows. Unsolicited information which emerges from different sources and parts of a system provides powerful corroborative evidence.

Analysis by community researchers is deeper than that constructed by external researchers

Another aspect of this systemic participatory inquiry process is that people who live with the realities they are researching have a deep and nuanced understanding of their dynamics and this gives them the experience to produce powerful analysis. When the analysis is done by community based researchers it not only generates knowledge, it builds ownership and it empowers which means that the knowledge is trusted and can be more effectively used.

The Bangladesh work was a testament to the way in which people who have no research training, who were disabled and older people (some blind or severely partially sighted); most of whom had no formal education and who were illiterate – could quickly learn effective facilitation skills, gather stories and collectively analyse them.

The Ghana Community Radio Network process is an example of how this is made possible through layers of inquiry. Here the community inquiry provides the first layer, and then the issues that are shared through radio broadcast become a second layer in the inquiry process which the wider community is able to engage with.

❶ Find out more about the project 'We Can Also Make a Change: Piloting Participatory Research with People with Disabilities and Older People in Bangladesh' on the *Participate* website (www.participate2015. org/research-activities/ add-international- alzheimers-international- helpage-international-and- sightsavers/)..

❷ Find out more about the work of the Ghana Community Radio Network on their website (www. ghanacommunityradio. org/).

The aim of these inquiries is to be able to see more of the whole than people normally can; to deliberate collectively on the implications of this, and to generate and enact solutions to the issues that are identified. Because people and communities are engaged throughout the process, these solutions can build genuine ownership which gives them a real chance of being sustainable.

Chapter 2 author biographies

Jackie Shaw is director of Real Time and author of Participatory Video (Shaw and Robertson, 1997). She provides international training, project and consultancy services. Jackie convened *Participate*'s visual methods work and facilitated programmes in Kenya, India and Palestine and has developed a critical understanding of the possibilities and constraints of visual processes.

Michelle Kahiu Gathigi supports the different projects of Spatial Collective in Nairobi's informal settlements. Michelle worked closely with the Spatial Collective field team on *Participate* through documenting pieces related to the participatory video research activities. Michelle reflects, alongside Jackie Shaw, on different aspects of this visual method.

Natalie Newell was Monitoring, Evaluation, Research and Learning Manager for nearly seven years at Restless Development Uganda, leading the Ground Level Panel process in Uganda (mid-2013). She currently works as the Programme Development Advisor: Monitoring, Research and Learning in South Sudan with War Child Holland.

Gill Black is the director of the Sustainable Livelihoods Foundation (SLF) and works in community-based TB and HIV research. Gill led the SLF digital storytelling activities for *Participate* to better understand the direct personal impact that TB and/or HIV have on people living in poverty in Cape Town.

Pelagia Tusiime is Community Empowerment Program Manager at the Coalition for Health Promotion and Social Development (HEPS), Uganda. She worked with the Public Defenders Association of Uganda and AIDS Information Centre. Besides her engagement on the Behavioural Change Communications Committee, she is also the *Participate* focal person for HEPS.

Walter Arteaga is a social researcher and anthropologist at the Centro de Estudios para el Desarrollo Laboral y Agrario (Cedla), Bolivia. He analyses dynamics of social and political participation of indigenous migrants in urban settings and territorial claims of indigenous peoples; works with approaches to citizen accountability and coordinates participatory studies.

Lipi Rahman has been working for the rights of older people for more than nine years in Bangladesh. She was involved in the 'Voices of the Marginalised' project as a peer-researcher. The research project sought to understand and address social and economic exclusion of older people and people with disabilities.

Clive Robertson is creative director and producer of Real Time. As the co-founder of Real Time he specialises in using video interactively to explore social issues and manage change. Clive regularly lectures and runs training in video production and post-production techniques. He led the documentary process for *Participate*.

Catherine Setchell is Research Communications Manager for *Participate*; responsible for communicating the messages from *Participate*'s research findings to influence global policy debates. She works in collaboration with the Beyond 2015 campaign and the PRG to ensure *Participate*'s messages reach stakeholders involved in the creation of the post-2015 development framework.

Danny Burns is team leader of the Participation, Power and Social Change team at IDS and director of *Participate*. He helped link the research to high level policymakers and supported other processes. More broadly, his research focuses on participatory learning for social change with an emphasis on systems thinking and complexity.

Praxis 2013

3 Participatory Processes of Policy Change

INTRODUCTION   *Participatory processes empower people to take action themselves armed with their own evidence and analysis*

The central aim of *Participate* is to democratise the way in which development happens through participatory processes that shape and influence policy. The relationship between participatory processes and pathways of policy influencing is therefore deeply interconnected with how we understand the prospects for social and political change. This chapter will explore what we have learned individually and collectively about how policy change happens in complex contexts. It explores the opportunities and challenges in enabling transformative processes that position people at the centre of development.

Within *Participate*, we understood policy as a process of change that is dynamic and highly iterative. This complexity influences the formulation and implementation of policy, and the actors involved. Within the policy process, we have seen the power of decision-making held across multiple levels, and policy change spanning the interface of local to global, with interconnections taking place across these domains. The implication of this for policy change is that strategies for engagement need to reach the networks of actors that span these levels and spaces, and interventions must take place across the different (and often unpredictable) phases and stages of the policy process.

We recognise policymaking as a deeply political process, with overlapping and competing agendas, and many power relationships at play. Some perspectives are included at the expense of others – notably, those of the poorest and most marginalised people. For lasting social transformation, people living in poverty must be acknowledged as central actors in the process of change. As we have seen from the contributions in Chapter 2, ❶ this transformation entails repositioning where and how

policy influencing emerges, and requires meaningful collaboration between people at the grassroots level and policymakers. However, even with this starting point, spaces for participation are shaped by unequal power dynamics which constrain opportunities for influence and action.

The contributions in this chapter deepen this analysis by sharing critical examinations of participatory processes in pathways of policy influencing, asking how policy comes to be defined, by whom, for whom, and with what effects on social and political change for the poor and marginalised people.

• Contribution 3.1 (page 46) analyses the links between community-based participatory action research through to global policy making. In thinking about policy change, an emphasis is placed on the flows of power and knowledge through policymaking structures. The contribution argues that those interested in systemic change should be able to recognise how and where the levels connect and where feedback loops exist that may enable the amplification of ideas across certain spaces. The effectiveness of these cycles

of feedback is connected to levels of interest and capacity to engage across multiple domains. To achieve incremental change, demand is necessary at every level of the system and central to this is sustained political action by people living in poverty and marginalisation.

- The personal reflections in contribution 3.2 (page 53) draw out tensions, dilemmas and opportunities within the spaces and processes that were opened up to facilitate this local to global interaction. Jackie Shaw and Clive Robertson share how the 'Work With Us' documentary film-making process balanced ownership of the locally filmed stories, whilst maximising the opportunity to influence international policy. Mwangi Waituru shares his experiences of engaging with the 'gatekeepers' of the post-2015 policy process at the global level and the ingredients for building influential relationships.

- Contribution 3.3 (page 55) reflects on experiences of participatory practice to question representation across levels and spaces for advocacy and engagement. Designing more representative methods for participatory policy processes is an increasingly important task; there are multiple barriers that prevent different actors and forms of knowledge from entering different spaces. Within participatory processes we must acknowledge the limits, boundaries and trade-offs involved, and consider the ethical implications of these.

Adherence to certain principles and ways of working are key for maintaining the legitimacy and integrity of representation in participatory research. This is of particular importance where participants engage directly in processes of challenging the issues and power relations which are driving marginalisation and poverty.

- Contribution 3.4 (page 59) looks at the assumptions about how change happens through the *Participate* process. The theory of change that is built recognises that policy extends to the personal level, and human connections are a part of what enables change to happen. The emphasis in this contribution is on agency as a basis for action, and how relationships lie at the heart of transformative social change. However, the process of change involves taking risks and enabling creativity and innovation for people in communities and policymakers so that they can renegotiate their positions and roles in order to pull together for change. This contribution addresses the need to better understand the constraints and limitations of those in high level policy positions and how to work to connect them better to the knowledge and experiences of marginal groups. In terms of outcomes, the authors establish that small shifts in power, language and awareness can catalyse a larger shift towards the realisation of rights and social justice for all.

3.1 Linking Community Participatory Research to Global Policymaking: Lessons Learned

Lisa van Dijk (Lead author)

With contributions from Steve Abah, Danny Burns, Carlos Cortez Ruiz, Neva Frecheville, James Kofi Annan, Pradeep Narayanan, Andrea Rigon, Catherine Setchell

The past two decades saw a proliferation of opportunities for the perspectives of people experiencing poverty and marginalisation to input into global policymaking spaces. So far these efforts have been contested, with attempts to embed participatory methodologies facilitating only limited consultation and falling into many pitfalls. While *Participate* was built on learning from previous attempts to influence global policy, we aimed to further understand participatory processes, and advance practical mechanisms for participation at every level of decision-making, from local to national and global. *Participate* emphasises the interactions between these levels and the importance of impacting multiple levels in order to create lasting, transformative change.

This chapter describes what has been learnt about bringing the voices on the ground into global policymaking. We examine how and by whom the

knowledge and evidence created were used, and the barriers and challenges to embedding this knowledge into global policy processes, through the following questions:

- What have been the challenges to embedding participatory processes into global policy spaces?

- What have these pathways of influence looked like, and what are some of the key lessons learned from these?

Pathways of participation in policy influencing

The knowledge generated through *Participate* was used at a variety of levels in different policy spaces, creating multiple policy-influencing pathways. The map on page 47 was developed by several members of *Participate*'s Participatory Research Group (PRG)
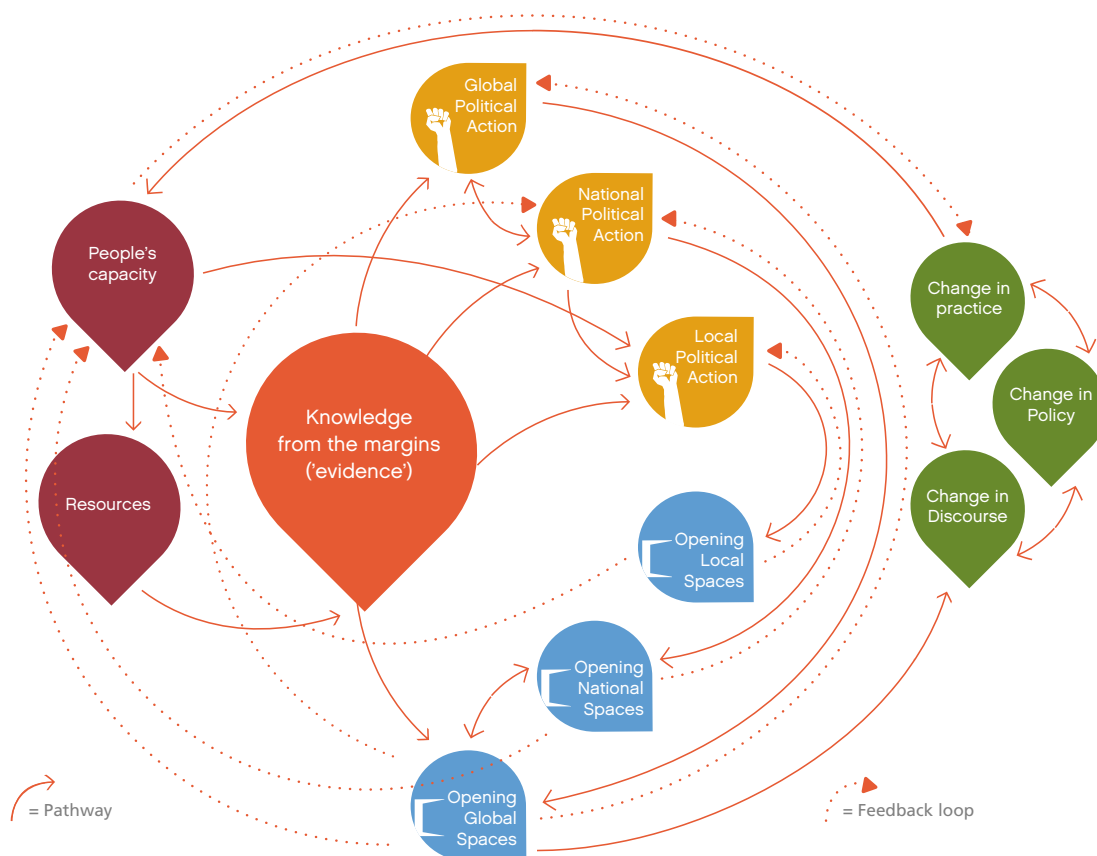
Please note this diagram is an illustrative example of the pathways of policy-influence in *Participate* and is not exhaustive.

Diagram 1. System map: knowledge flows in the Participate policy influencing process

to illustrate some of the multiple pathways in which knowledge from participatory research was used to influence policy processes at local, national and global levels.

People's capacity

Central to the policy influencing process presented in the system map (diagram 1 above) is the capacity of people living in poverty and marginalisation to create knowledge as 'evidence' of their own issues, and to recognise the value of that knowledge through participatory research processes. The research methods and approaches that were used to generate this knowledge are discussed in other sections of this anthology.[1] Participatory research, such as Participatory Video (PV) and Digital Storytelling (DST), and in-depth participatory inquiry aims to enable local people living in poverty and marginalisation to do their own research for social change on their own terms.[2]

The participatory research methodology aspires to a proactive role for local people at every stage of the research. As well as designing the research, people living in poverty and marginalisation collected and interpreted the information. Through the research initiative, participants created their own space in the debate by engaging with their own community members as well as external stakeholders. For example, in Ghana, children identified lack of

knowledge around sexuality as a key driver of teenage pregnancy, and used video to present their findings to their peers and community in an attempt to change attitudes.[3] Testimonies prepared by a group of sexual minorities in India using participatory video were shown to their own members during their Annual General Body meeting, as well as being displayed at the 'Work With Us' exhibition [4] at the United Nations (UN) headquarters to influence the global post-2015 debate.[5] Where people in poverty and marginalisation generated evidence of their issues and priorities, they often felt increased ownership and were motivated to use this evidence to drive change at local and global levels.

Local, national or global action: opening spaces in local, national and global levels

The knowledge generated through these participatory processes can stimulate local, national or global political action, which can then be used to open and engage with local, national and global spaces of influence. At the local level, networks of people experiencing poverty and marginalisation involved in the research may make use of their new knowledge or 'evidence' to influence and build partnerships with local decision-makers:

[1] See Chapter 2 - Starting with people: Learning from participatory practice.

[2] For more information on the participatory methods used in *Participate* see the methods pages on our website (www.participate2015.org/methods/) and, pages 59-78 in the *Participate* global synthesis report 'Work with us' (www.participate2015.org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).

[3] For more information refer to *Participate* global synthesis report 'Work with us', section on Community social norms and discrimination on page 39.

[4] For further insight into the *Participate* exhibition 'Work with us' see the reflection by Catherine Setchell in Contribution 2.2 Participatory Approaches and the Policy-Practice Interface.

[5] Watch the full length version of 'Towards acceptance', a participatory video film made by transgender activists in Chennai, India with support from Praxis and Real Time (vimeo.com/74171698).

- Youth in Egypt used their research findings to engage their community and establish dialogue with local leaders and local authorities;

- People involved in the research in Nigeria participated in theatre forums to engage with local officials, community based organisations and women's organisations on the issue of increased transparency and accountability;

- In Mexico, research with indigenous people led to demands for changes in the health services on national level (medicines, equipment, and medical responsibilities), when these were initially made at the local level.

- CityMakers in Chennai and Delhi created evidence that was used by local campaigns to sensitise police and local stakeholders.

There are also examples of people living in poverty and marginalisation involved in the research talking directly to national and global policymakers, such as Betty Maina's visit to Mathare slum in relation to the participatory video process.[6] People living in poverty and marginalisation involved in the research in Chennai participated in a United Nations Development Program (UNDP) webinar and presented their views to UN officials. [7]

While people experiencing poverty and marginalisation involved in the research were able to use the knowledge they generated to open local spaces, the *Participate* team at the Institute of Development Studies (IDS) synthesised the research findings of the 18 participatory studies [8] and worked with individual stories of change in the lives of people living in poverty to open spaces and influence policy at the global level. For example, during the UN General Assembly in September 2013, an exhibition of people's stories 'Work with Us' was displayed in New York. Many spaces were created through the *Participate* IDS team efforts to build relationships with key actors throughout the UN High Level Panel (HLP) on the Post-2015 Development Agenda,[9] with the aim of influencing the HLP report to be more responsive to and inclusive of the voices and perspectives of people living in poverty.

However, the elite nature of these spaces where only 'expert voices' are heard, the need for legal identities and documentation such as passports and visas, the cost of travel, the jargon of the post-2015 policy debate, and the confidence necessary to speak in pressurised political public spaces, meant that it was difficult to meaningfully bring people who had first-hand experience of the reality of poverty and exclusion into these spaces. *Participate* was effective in navigating these spaces and building relationships with powerful actors to the extent that representatives from the initiative were sometimes able to access and influence 'closed'[10] spaces as well as 'invited'[11] spaces (Gaventa 2006).[12] The Ground Level Panels [13] (GLPs)

were developed as a platform to bridge this gap and directly engage people with national and global actors. However, the ability to destabilise existing power structures remained elusive. [?]

Hydrology of policy in the post-2015 process

The systems map (diagram 1- page 47) shows that knowledge does not travel through linear pathways. Bringing research into policy influencing at multiple levels is a complex process; knowledge generated by people on the ground flows across different influencing levels, feeds into different spaces, leading to potential changes in discourse (and sometimes practice) and in policy that revert to affect the lived reality of people on the ground. But this is not a one way process: changing discourse can open new spaces and changes in practice can influence discourse. Local level changes can proliferate 'horizontally' to other communities; and likewise 'vertically' it can influence what happens at the national or global level.

[?] This raises questions about who owns the 'relationships' with key decision-makers and about the legitimacy in representation of people in poverty and marginalisation: Who speaks once the debate has reached the higher echelons?

Contribution 3.3 explores issues of representation across levels and spaces in the post-2015 process.
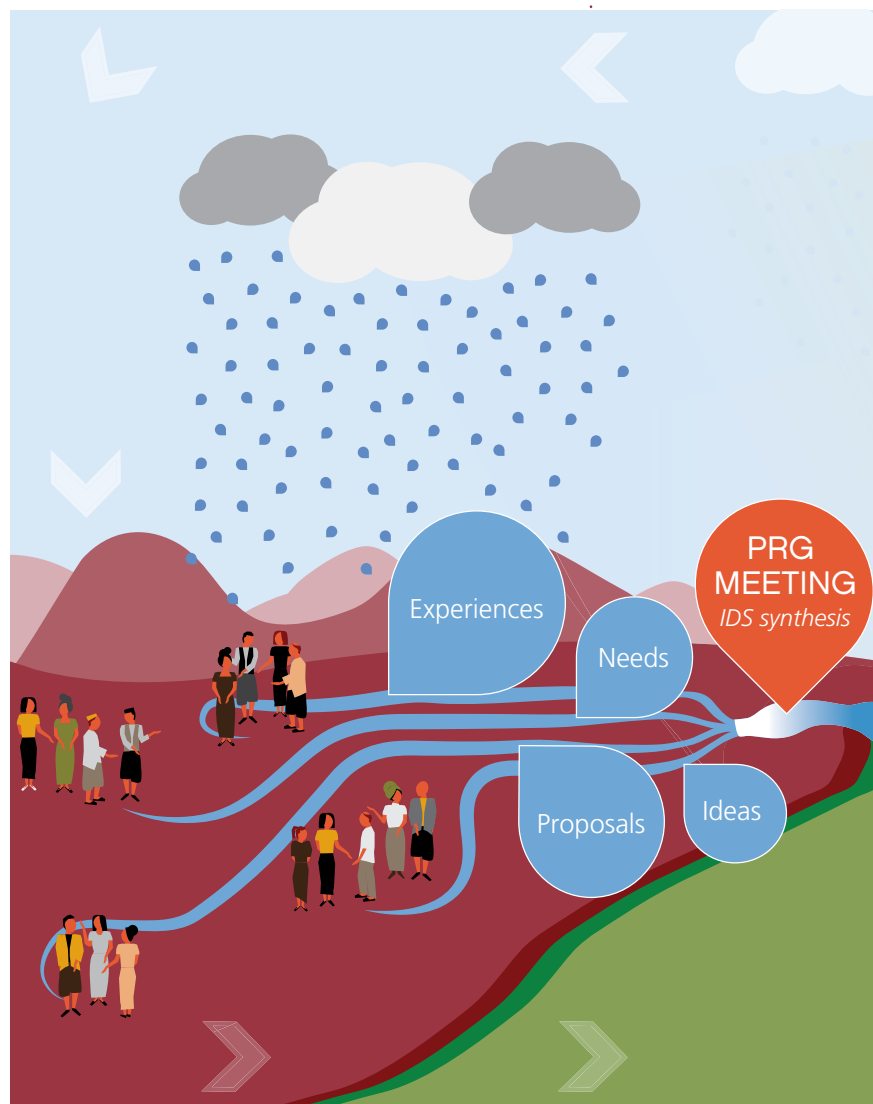
Carlos Cortez, PRG member representing Universidad Autónoma Metropolitana, Mexico (UAM-X), described this as the 'hydrology of policy' in the post-2015 process (diagram 2 below):

In the diagram, the ideas, needs, proposals for change and experiences from the poorest and most marginalised people are represented as the water that flows from springs in the local isolated places where they live into little streams. These streams of ideas, needs, proposals and experiences join to create rivers that feed the big river that represents the global debate on these post-2015 themes. Most of the decisions are taken in places where marginalised voices are hardly heard, because the springs are far away from where the big river joins the sea. From the diagram it is clear that the rivers go through a winding route, with obstacles such as dams along the way that limit and control the flow of the water. This represents the challenges faced while trying to bring the voices of the poor and marginalised to the place where the decisions are taken.
Often they only reach after an 'evaporation' or synthesis process in which the voices of the poorest and most marginalised on the change they want has almost disappeared and are little considered by the decision-makers.

The result of the global debate is represented in the diagram as clouds which present the general discourse and practice of 'development' from the perspective of the decision-makers. The clouds move towards land and arrive back at the source of the spring as a 'rain' of projects, programmes or simple promises from government and social actors. As in the real world, rain can be light, causing drought, or can be heavy, like a storm, in both cases not responsive to the poorest and marginalised.

Challenges in embedding participatory processes into global policy spaces

Engaging across different levels to achieve changes in development that prioritise the poorest and most marginalised people is not without challenges.
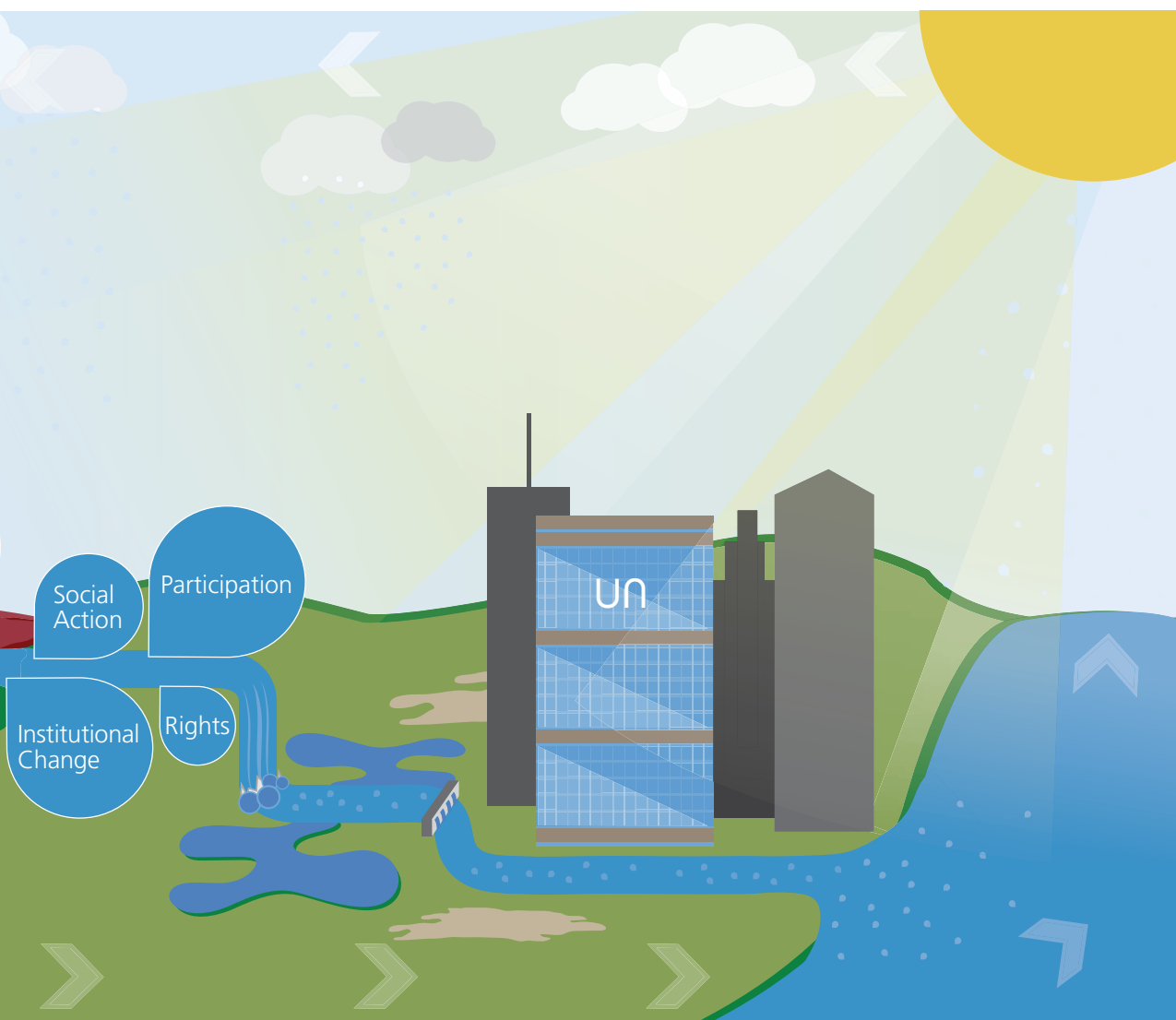

Diagram 2: The hydrology of policy

[6] Betty Maina was a member of the UN High Level Panel (HLP) on the Post-2015 Development Agenda.

[7] Read Contribution 3.3 Representation across levels and spaces for further discussion on local, regional and global engagement between people living in poverty and decision-makers.

[8] See the *Participate* global synthesis report 'Work with us' (www.participate2015.org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).

[9] Find out more information about the UN HLP Process here: www.post2015hlp.org

[10] 'Closed' spaces are spaces in which decisions are made by actors behind closed doors with limited possibility for participation and consultation. Civil society often exerts efforts to opening up these spaces (see Gaventa 2006).

[11] 'Invited' spaces are often new spaces created by the efforts of civil society to widen participation. Through advocacy efforts, closed spaces "open", creating new spaces in which citizens or beneficiaries are invited to participate (see Gaventa 2006).

[12] Gaventa, J. (2006) 'Finding the Spaces for Change: A Power Analysis', *IDS Bulletin* 37.6, Brighton: IDS

[13] Find out more about the Ground Level Panels on the *Participate* website (www.participate2015.org/ground-level-panels).

Community activists and local policymakers in Nairobi, Kenya meet within the local community to engage on the issues facing people with disabilities and their families

Feedback loops

Participate successfully aggregated the participatory research findings and highlighted individual and collective stories of people living in poverty to influence global policymaking. However, our experience is that the feedback loops from the global back to the local were not so effective. As Gaventa (2006: 28) [14] identified 'the challenge for action is not only to build participatory action at different levels, but how to promote the democratic and accountable vertical links across actors at each level'. Thus connecting not only local to global but also connecting global to local, the process has to focus on global AND local. Although many of the PRG members are working at the local level, they are not necessarily using the outcome of the global research synthesis and policy influencing to feedback into the participatory processes on the local level. Feedback of the outcome of the global research synthesis can contribute to validating the research outcome at the local level and inspire and strengthen calls for action.

Often findings from local research and action are used instrumentally as 'evidence' for global policy demands and because of that, local narratives take the form of sector specific outputs led by different international actors. *Participate* played a significant role in transcending the 'territorial' barriers of global civil society groups. However, a more effective approach would require a system that promotes community-led analysis at the global level (see section on GLPs below). Taking the global content back to the national level (and local level) to influence political action, and open national spaces for policy engagement has been much more of a challenge. So far decisions made at the global level have largely failed to translate to the national level, let alone the local level. ❓

Opening spaces on local, national and global level

At the global level, the UN system is complex and intimidating. Corridors of power in New York are elitist and exclusive. The UN-led post-2015 development process is centered on the decision-making of a small number of global elites based in New York. Often communication between decision-makers at the UN headquarters and those based in capitals is weak and sporadic, with those in country having little or no knowledge of the complex negotiations taking place – or even an awareness of the existing development framework of the Millenium Development Goals (MDGs).

This is not to suggest that it is easy to access important actors at the local or national level, while those at the global level are on some remote plane. Far from it: for communities who have historically been excluded or marginalised, accessing local decision-makers can be complex and challenging, without the tools or resources needed to make their voices heard. It was only through the use of the Photo Voice approach on social media that street photographers in a South African township were able to raise awareness about the situation of the informal economy and open space on a local level to engage with the municipality. [15] Furthermore, the experiences of the PRG members indicate that accessing local power structures and political spaces has significant challenges that arise from vested interests within the community. In Bangladesh, on the national level there is space for engaging with disability rights issues, but at the local level this can prove very difficult.

[14] Gaventa, J. (2006) 'Finding the Spaces for Change: A Power Analysis', *IDS Bulletin* 37.6, Brighton: IDS

[15] For more information on this research process see the report (www.participate2015.org/publications/the-sustainable-livelihoods-foundation-research-report-photovoice-street-life-in-ivory-park/).

Short term immediate aspirations versus long term solutions

Working with people living in poverty to build a vision for global development poses challenges as their aspirations are often short term and immediate, while the post-2015 agenda is also concerned with longer term change and macro-level issues. This was particularly evident in the GLPs, where a diverse group of people from the margins drew on their own life experiences to provide a 'ground level' reality check to the HLP recommendations; as well as develop their own shared vision for development. The discussions of the GLPs often focused on immediate problems and everyday concerns: in Egypt 16 for example, discussion on the proposed global goal on securing sustainable energy focused on the immediate need for energy due to the political unrest in the country.

The GLP process raises questions around how to move from a localised, short term perspective to longer term, sustainable action that enables people living in poverty to engage with global processes and decisions that affect them on multiple levels. It opened space for participants' discussions to move from urgent needs to search for longer term solutions. This process led to a discussion on how to sustain change, and in this particular example linked the solution to the transformation of unequal power relations, including social, technical, economical, political, and cultural relations.

Building the capacity of people to do their own politics

The post-2015 development agenda is driven by the UN-defined deadline of September 2015. As such, short-term influencing opportunities and the need for 'quick' evidence to input to the HLP process was in direct conflict with the timeframe needed to build sustainable, empowered processes on the ground that enabled a demand for change at the community level. There was not enough time and resources to enable people experiencing poverty and marginalisation to recognise that they themselves must define actions and engage with decision-makers on local and national levels to advance their rights claims.

Although this challenge was partly anticipated by the *Participate* network when engaging in the post-2015 process, and the PRG consisted of members who already had long established working relationships with marginalised groups on the ground, there was little that could be done to mitigate the short term nature of the global policy process. Nor to shift power dynamics in a way that radically transformed people's ability to *participate* in the direction of development. There was neither the time nor the resources to support this empowerment process and build the capacity of people to do their own politics. The challenge is to facilitate direct and sustained advocacy by marginalised communities.

Lessons learned from bringing voices on the ground into global policymaking processes

Bringing the voices on the ground into global policymaking is a process of incremental change following multiple pathways with multiple types of engagement.

In *Participate*'s final reflection workshop, the analogy of scaffolding was used to explain and visualise the policy influencing process (diagram 3 - page 52). Whereby each scaffold contributes to bringing the voices on the ground into the policy making process. For this change to be sustainable and responsive to the perspectives of people living in poverty, there is a need for multiple types of pathways and people's engagement.

Investment is required in processes and resources to transition ownership of the global process to the community level and enable people to hold the global framework to account in their local settings.

Participate aimed to bring the perspectives of those in poverty into decision-making processes, however this is not enough: the global decision-making processes must feedback to the local and national levels, and enable people living in poverty and marginalisation to take action and advocate for their rights.

There is a need to work across the whole continuum from local to national to global, to build and sustain effective change.

A lack of emphasis on national level engagement poses challenges in influencing the post-2015 agenda. This lack of emphasis not only engenders a dearth of spaces but also a shortage of actors with capacity to do this. Limited emphasis on building the capacity of people living in poverty and marginalisation to engage in sustained political action on national (and local) levels will result in marginal or insufficient systemic change.

Demand for change needs to happen at every level of the system – from local to global and global back to local. Like the scaffolding and incremental change analogy above – every level needs to build on the foundations for transformational change.

Ground Level Panels were developed to bridge the gap between people living in poverty and national and global actors

16 Find out more about the Egypt GLP on the *Participate* website (www.participate2015.org/ground-level-panels/egypt-glp/).

If we believe that people have the right to have a meaningful say on the global policy that affects them, then it is our responsibility to learn how to do this in the most effective and ethical way. *Participate* was built on the learning from previous attempts to influence global policy.

Reflecting on whether we were successful in achieving what we aimed to set out to do: it is probably too early to tell. We were successful in getting local messages synthesised to the global level, and this has had some influence on the outcomes of the post-2015 debate. [17]

Diagram 3: Scaffolding the policy process

3.2 The Politics of Policy Influencing: First Person Narrative Reflections

Gatekeepers who control spaces: Building relationships and credibility to access hidden spaces

Mwangi Waituru

One day in New York, I was having coffee with a United Nations (UN) friend who is involved in articulating the post-2015 development agenda. I highlighted the challenges we are facing in finding an agenda that is ambitious while at the same time actionable. He asked, "when you say we, who are you?" My response was that the UN Secretariat, the member states and the civil society were working on this together, and would bear the responsibility for an ineffective policy framework. I have never felt more like an outsider to the process I had worked so determinedly on for two years.

This image sharply contrasted with the strong, collaborative relationships we had cultivated with gatekeepers to the post-2015 process. The *Participate* initiative, working with the Beyond 2015 campaign, developed very encouraging relationships with members of the UN High Level Panel (HLP) and their advisers. The advisers had more time to engage with us and were the ones working directly and tirelessly on the text of all HLP documents. Their proximity to and time with the principal HLP members meant that if ideas were embraced by the advisers, they had a better chance of getting high level buy-in. A relationship with the advisers provided the Participatory Research Group (PRG) with access to internal documents and an opportunity to react and input into the documents at various stages of development.

During the major HLP meetings, there was an outreach day for engaging with external stakeholders such as civil society organisations (CSOs), academia and the private sector. At the Monrovia meeting, CSOs organised a day of consultation to develop a common position paper for presentation to the HLP. This space was very competitive with each of the participants trying to get their issues in the paper, and so it was difficult to get the voices from participatory research included. Nonetheless, strong packaging of the messages in powerful language helped in building interest and engagement from the CSO participants. The lessons from the ground were very helpful in making sense of the issues presented by CSOs and strengthened the final outcome communiqué.
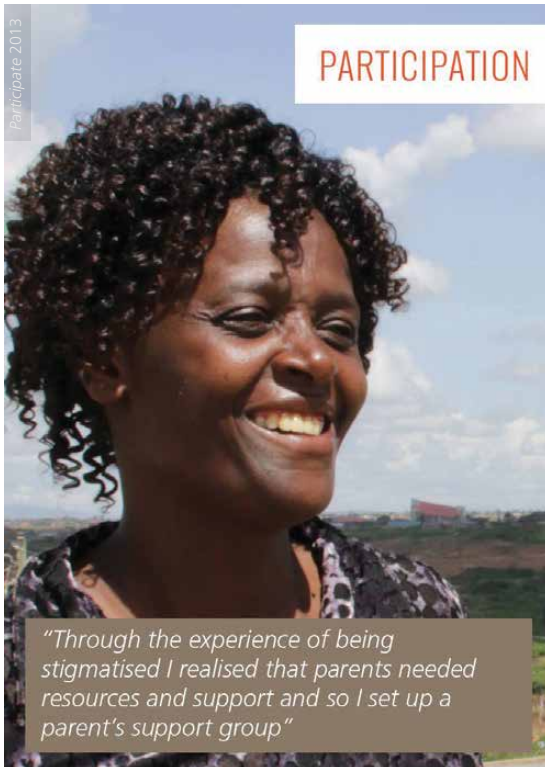
Through a workshop-style meeting in Monrovia, we also presented the raw voices of people living in poverty and marginalisation to the HLP, either through life testimonials or through documentaries made by the people on the ground. This is one space I found least connected to the policymakers. After the presentations, we were criticised by the HLP for presenting small shifts as opposed to macro projects that could have large quick gains.

At the Bali meeting we did not have this space. Instead, we did a lot of one-on-one meetings with the HLP members and their advisers. Those that we met asked for top line messages only. The one-on-one and off the record interactions were more meaningful and effective in getting our messages heard. One such message that was lifted from our documents and given higher prominence was the language of 'leave no one behind' which came from the research of PRG member ATD Fourth World.

Certain ingredients were necessary for a relationship between *Participate* and the gatekeepers to thrive: First, the PRG group members had to prove their credibility. It was essential that the policymakers were sure that the content they received reflected the actual voices of the people on the ground. The policymakers were eager to ensure that the document they came up with considered the realities and the aspirations of the poor. Secondly, the policymakers wanted the voices presented in a language that made sense to the policymaking processes. They were interested in translating people's realities into policy statements and the extent to which you demonstrated this ability was essential if you were to be included in the process of issues formulation. The third ingredient was to build trust. Sometimes, leaked documents were widely circulated online, with much embarrassment for the secretariat staff and panel members. Building faith for observance of confidentiality and constructive engagement was central.

To end, I think it is worth noting that, on reflection, the extent to which PRG and Beyond 2015 staff accessed and gained confidence with the policymakers favoured northern practitioners. Partly, this could be explained in terms of northern practitioners having resources to work on the post-2015 process full time while southern CSOs practitioners have to bank on support from their colleagues in the north or work on a voluntary basis meaning they can only devote a fraction of their time to the process.

PARTICIPATION

"Through the experience of being stigmatised I realised that parents needed resources and support and so I set up a parent's support group"

An ongoing challenge was to ensure that policymakers listened to the voices of the people that were being shared at the UN-level

Balancing ground level visual research processes and communications products for policy influencing

Clive Robertson and Jackie Shaw

The 'Work with us'[1] film produced by Real Time [2] provided the means for some of the poorest and most marginalised people worldwide to communicate directly to decision-makers about what matters in their own words, situated in their own environments. Production also illustrated the very real tensions between expressing local interests and engaging in high level policy spaces, particularly given the timeframe demanded by the UN deliberation process. The challenge was maintaining group ownership of the filmed stories, whilst maximising the opportunity to influence international policy through the film's wider message and quality. In this sense, we were film-making to an external agenda, not supporting groups making their own programmes (as we were during participatory video processes); all be it with a collaborative commitment to selecting stories which illustrated ground level realities and priorities.

The documentary process needed to balance the potential advocacy gains for the groups involved, and the possibilities of influencing the more general policy deliberations. The latter involved working together to amplify the wider arguments, for example: the value of participatory processes in generating deeper contextual insight; why participatory dialogue

between marginalised groups and decision-makers is important to the policy agenda; and how participatory exchange can build more equitable collaborations. We perceived an ethical imperative for those people filmed to have had previous participatory research involvement, not only so that they had reflected more deeply about what they wanted to share, but also so they could make informed choices about being filmed, and the most of the opportunity to communicate with decision-makers. Because the groups visited were at different stages of their research, we used a variety of approaches to transition from local issues to policy-focused communications outputs.

Learning to make films that communicate a strong and clear message is not only a technical matter. It requires understanding of narrative construction using both speech and visuals. In Bosnia, documentary-making was aided because participants had already been through a digital-storytelling process, which had given them experience of narrative construction.[3] They also knew what they wanted to say, and understood the documentary crew's relationship to them, so the stories were gathered quickly. In other cases, we adapted a narrative framework developed by Freytag [4] to introduce the community context, illustrate the issues, and draw out a significant moment of change. Importantly, the structure assisted us in progressing beyond the issues to how the community concerned had acted to address the barriers to improvement, and what they believed could enable change including actual or possible future outcomes. The films concluded with a key message those involved wanted to communicate about what was needed. Although formulaic, we found it was easy for participants to relate to this framework, which helped when developing their research and policy communication outputs. For instance, used with urban poor groups in India [5], and with people facing environmental issues in the Philippines, it enabled us to shift story planning to people's perspectives on change processes more rapidly than we would have expected otherwise. This facilitated co-construction of knowledge, because it assisted ground level control over content, whilst evolving stories that were relevant to both the research purpose and the wider documentary brief.

Not surprisingly, many of the stories from the research were complex and nuanced, and reflected the interconnectedness of the development issues that the research had unearthed. These examples were harder to communicate clearly and concisely in support of the documentary narrative, and needed considerable work to contextualise adequately for an outside audience.

The final challenge was in producing the linking materials to construct the documentary meta-narrative; especially as we did not know what the

[1] Watch the 20 minute documentary 'Work with us: Community-driven research inspiring change' and be inspired (www.participate2015.org/2014/01/09/work-with-us-community-driven-research-inspiring-change/).

[2] Find out more about Real Time's work on their website (real-time.org.uk/).

[3] Read 'Citizen Engagement through Visual Participatory Processes in Bosnia' to find out more about the work that film participants and PRG member Oneworld- Platform for South East Europe Foundation (OWPSEE) had been involved in outside of *Participate* (www.participatorymethods.org/method/participatory-visual-methods-case-study).

[4] Freytag's diagram of dramatic structure shows the relationship between dramatic tension rising, to the climax of action through to the conclusion of the drama and the unravelling of that tension.

Freytag, Gustav (1863). *Die Technik des Dramas* (in German)

[5] CityMakers in Chennai, India are seeking to reclaim cities they build. The film they made in collaboration with Real Time 'Of the mighty and the mangled', shares their aspirations for change (vimeo.com/74282091).

overarching narrative would need to say until close to the end of production. We assigned some time in each setting to record statements in support of the original documentary brief, and the overall communication priorities that were emerging as contained in the *Participate* policy documents. This was most successful in Kenya, where English was widely spoken, and there was a sufficient sense of mutual purpose to work up possible statements that fulfilled the wider documentary narrative needs. By necessity, this was the most top down directed aspect of production, but the good working

relationships established with participants through the accompanied processes made it possible to negotiate.

Overall, we faced a tricky balance between ground level communication priorities and the opportunity to influence policy. We concluded that this was dependent on the relationships with network partners and local communities, which needed time for interactive processes before production to establish mutual relationships and collaborative dynamics.

3.3 Representation, Advocacy and Engagement Across Levels and Spaces: Reflections from Participatory Practice

Matt Davies and Masiiwa Rusare

One of the integral aspects of the work of the Participation Research Group (PRG) was to strengthen the representation of its core constituents, those living in extreme poverty and marginalisation, in the post-2015 process. This involved considering the legitimacy of representation – how should people living in poverty represent themselves, and what conditions are necessary for this representation to be empowering and not tokenistic? This is intrinsically linked to the issue of creating ownership of the research by the participants, including ensuring continual feedback to them when the research is represented by others on their behalf. Collective identification of the different spaces for influencing was also crucial in order to effectively conduct advocacy, as well as identifying the most appropriate way of undertaking this representation (who and how).

Our reflections focused on when and where people living in poverty themselves could carry out activities associated with interacting directly within different policy spheres. Such instances had ethical implications, particularly given that participatory mechanisms and approaches were central throughout *Participate*. This contribution draws on the experiences of two PRG members who illustrate these issues in relation to:

- The significance of 'meaningful participation' in empowering people living in poverty to generate knowledge and raise their voice;

- The importance of placing local people, and their aspirations for change at the centre of the process of participation, and how their messages are communicated across policy levels and spaces.

Questions of meaningful participation in ATD Fourth World's 'Merging of Knowledge' approach

Matt Davies

ATD Fourth World's research enabled local research participants living in poverty to take an active, rather than passive, role in taking their messages into spaces for policymaking at different levels. For ATD Fourth World, this was realised through workshops and seminars bringing together research participants and people in public policy and academia at both national and international levels.

The risk exists that if people in poverty are asked to represent themselves and their peers simply as a point of principle, this representation is a tokenistic gesture and their participation a demeaning and meaningless exercise. Yet conducted within a supportive framework, and underpinned by capacity building, the exercise can be both empowering and transformative for the individual and others in their community.

In order for the participation of people in poverty to be meaningful and go beyond tokenism, various obstacles must be overcome. During an ATD Fourth World national seminar in Madagascar, participants from a background of extreme poverty gave a vivid description of factors that hinder their participation in public and political processes:

> *"People living in extreme poverty feel that they are rejected by mainstream society. They endure a lack of food. They are afraid to enter offices since they wear unclean clothes. They dare not enter health centres and so carry illnesses that end in death. They lack financial resources and spend their time looking for money. Extreme poverty brings about fear, shame, and the fear of not being able to express what you mean."*

Self confidence and trust between those involved in a participatory engagement is essential for equality, inclusion and empowerment in the process. We have learned that people need the time to develop a collective understanding of their situation and to construct a sense of agency and pride that counteracts the stigma and isolation of extreme poverty.

Obstacles to this lie in the prevailing mindset of those in positions of power (in public policy, academia and among development practitioners). In this sense, obstacles lie also with those with whom we wish to engage, to challenge them to enable spaces for the effective participation of people living in extreme poverty. ❓ As explained by Donna Haig Friedman from the Center for Social Policy of the University of Massachusetts during the concluding international seminar of ATD Fourth World's global MDGs research in June 2013 [1]:

> *"Top down planning and expert voice are privileged over the ideas that come from those with life experience. Assumptions are made that those in extreme poverty are too beset by the daily challenges of life to take part in solution generation. The sharing of power is perhaps the most daunting challenge."*

Participatory processes that enable empowered knowledge

Where participatory processes are initiated by external actors, such as development practitioners and government agencies, there are critical considerations in enabling an empowering experience. Recognising the capacities of people trapped in extreme poverty to reflect on and analyse the issues impacting their lives is an important step for real partnership and participation. This is also a step in moving from an 'extractive' process in which people in poverty are research subjects, to a participatory process in which they are research partners. As research participants from ATD Fourth World in Mauritius expressed during the research process:

> *"The poorest must not be forced into participation, certain procedures and conditions must be put in place. Genuine participation of the poorest people is essential before, during and after every project. This does not mean merely consulting them. Time is important. It is essential to take time before, during and after the project. From the outset, people living in poverty must participate in the conception, decision-making and implementation of the project. The project must be designed with people and not for people."*

To be genuinely participatory and to contribute to a social change agenda for the poorest and most marginalised, a research project must meet several conditions to ensure participants can take ownership of the collective knowledge they produce, and to enable opportunities to act on that knowledge:

- Those in a position of power within the project must be aware that policies and programmes often fail to reach the most impoverished communities, and be willing to change the social, economic, and cultural realities that perpetuate extreme poverty and exclusion.
- People living in poverty must be recognised as possessing a unique knowledge. They must not be defined by what they lack or need, but as active members of society who offer a valuable insight gained from life experience.
- People living in poverty must not be isolated within the project. They must have secure links to others living in similar circumstances, and space and time to discuss and reflect as a group.
- Each person must feel that they are an equal participant within the project and be able to play an active role in all aspects of it.
- To avoid people feeling used as part of a tokenistic exercise, the project has to build personal skills, add meaning to people's lives, and strengthen existing relationships within the community as well as build new relationships within and outside of the community.
- The project must be transparent and accountable to participants. Participants have to receive feedback about the outcomes. Information should include how participants' words are being used and the impact of participants' statements.
- Any reports or other outputs that will be produced should be shared with participants – or preferably be co-produced with them.

These last two conditions point to the need to build into the process an ethical framework that recognises people in poverty as genuine partners in the research. PRG members agreed from the outset to ensure participants from a background of poverty would be involved at all stages of the research process, particularly in feeding back at all stages. This is particularly important in circumstances where representation of the participatory research was carried out by people other than those living in poverty.

Personal transformations through participatory learning and action

The above conditions are based on the 'Merging of Knowledge' methodology. [2] They identify how people living in poverty are able to take ownership of the knowledge they generate and consequently be equipped to represent themselves and their peers in dialogues with people from other backgrounds. Ensuring that people in extreme poverty have the chance to analyse and reflect on their situation does not only lead to better policy suggestions. In developing an understanding of their situation that they have ownership over, they are also able to construct a sense of agency that frees them from the stigmatisation and isolation of extreme poverty.

This approach is conducive to people in poverty being more self-confident, and to people in positions of power being more humble, putting both partners on a more equal footing. It is a way of empowering all participants by guiding them to join their efforts and work together. As an example of this, a research participant from Madagascar, who had taken part in a seminar with participants from national and international institutions, such as government ministries and UN agencies, explained what this representation experience had meant to her:

> "These two days were very important to us. It was not a leisure activity. It is important to discuss how our children, our nation and the next generations could have a better future. This meeting has really enriched us and has boosted our spirits. There was no disdain against us. You treated us like human beings. We feel citizens and equal. We know we have the capacity to develop ourselves."

The impact of feeling empowered through a sense of ownership over the knowledge produced can have further benefits as the quote above illustrates. In this sense, the ownership created is carried forward into other aspects of their life in order to move towards overcoming extreme poverty and exclusion.

Mobilising local knowledge across levels and spaces in African Monitor's Poverty Hearings

Masiiwa Rusare

Poverty Hearings are a participatory process whereby communities are given a platform to share stories, experiences, realities and aspirations among themselves as well as with outsiders such as policymakers and community development workers. The approach emphasises enabling community members to generate and connect their own narratives to an issue; and be able to share that with diverse community members, policymakers and other stakeholders. The role of the policymakers is to listen to the issues as they are being generated and shared by communities, reflect and commit to taking action that responds to these grassroots realities.

Working with stories to share and understand diverse knowledge

Stories and storytelling remains one of the most important ways in which people share their experiences, realities and aspirations among themselves, in their community as well as with outsiders. The Poverty Hearings approach places storytelling at the centre of the way knowledge is generated and shared. In small groups, structured according to age, gender, issue, etc. and sensitive to community culture and traditions, a neutral 'focus statement' is presented to help catalyse discussion. The focus statement is neutral in the sense that an issue can be addressed positively or negatively. Hence those in the group have the autonomy to select their own story to share; it is not determined by an external facilitator.

It is important to note that during the small group discussions, not one story is told in the same way. There are some stories and experiences that are very touching, and those that resonate with more people's experiences than others. Other stories may be more vivid, more recent and more passionate than others. The decision of which stories are selected for sharing in the wider community group and with decision-makers, is left to the small groups and the story-tellers. Each group chooses one or two stories which they believed to be worth sharing and speaks to the issues under discussion. Thus at this group level, the stories that were selected had group buy-in. This buy-in from other group members was also enabled

ATD Fourth World research participants engaged in a merging of knowledge process in New York

through allowing the group members time to discuss and connect their stories into a 'giant' or 'collective' narrative that was then shared with others. This method also responds to group trade-offs in terms of whose story is told and by who. It is important to note that group selection of stories to share also depends on group dynamics as, in some cases, those with compelling stories may not volunteer due to lack of confidence, among other things.

Once selected, the stories were shared with the wider group in plenary. This also provided an opportunity for community members from other groups to connect with the stories, and for policymakers to engage with the issues in the story. After the selected stories were told, an opportunity was given to other community members to reflect and react. During this platform community members augmented the stories with their own experience as a way of showing how shared or common the issue is.

Creating legitimacy by starting from the community and engaging with policymakers

Legitimacy of development outcomes is important in community development. It is not a product of the leader, but a product of several affected stakeholders. This means that the process is as valuable as the outcome. The Poverty Hearings methodology that African Monitor used extensively has taught us that legitimacy is neither created by communities nor policymakers alone. Both need each other. Because of this, Poverty Hearings bring together communities and policymakers to a community platform to discuss relevant development issues. The selection of the community as the platform or venue of these hearings is no accident.

Normally when we invite provincial and national level policymakers to meetings in hotels and lodges, they request a substantial transport allowance as well as generous and lavish accommodation in spite of the fact that the engagement is part of ensuring they are doing their duty. However, when we bring them into communities, they are too humbled and at times embarrassed to request all those luxuries. In some cases, it suddenly dawns on them that they have a duty to communities. This realisation is the start of creating joint legitimacy of development outcomes with communities. On the flip side, when communities are taken to hotels and lodges to discuss with policymakers, they feel disempowered because they are in 'unchartered waters'. However, hosting policymakers in their own backyard awakens their power and the realisation that they can act on that power.

A key ingredient that has been fundamental in the creation of joint legitimacy of outcomes through Poverty Hearings has been the emphasis on constructive engagement between policymakers and communities. Once the policymakers and local

participants are assured that the Poverty Hearing is not going to be a mudslinging political rally or an 'us vs. them', they are more likely to open up, to listen and to engage constructively. In the case of Zambia and Malawi, the policymakers invited community members to work with them on the outcomes of the Poverty Hearings.

Risks in sharing knowledge from local to global levels ❓

As part of our influencing agenda to achieve transformative change for the poorest and most marginalised, African Monitor works with the bottom-up messages from the Poverty Hearings to impact at regional, continent-wide and international level policy. Our experience has shown that information requirements and saturation at these levels require streamlined, precise and targeted input. The capacity to understand issues emerging from the communities diminishes as one moves up the hierarchy. At such levels, there is less appetite for contextualised stories from marginalised groups and more focus on mainstream punchlines and issues that speak to the policymakers' narrow priorities. In some cases, the time slot given to civil society practitioners in such invited spaces is not enough to share stories. This increases the likelihood that issues of importance generated by people living in poverty are inadequately represented. In addition, and in most cases, the development practitioner who was involved in the generation of those stories is not the same who presents them because such platforms require 'high level' representation.

The ethical considerations of creating feedback loops – being accountable to those who produced the knowledge – speaks to the medium of communication as well as our role (as development practitioners) in ensuring that the loop works well. It also depends on who takes the information and who brings it back. In as much as the communities generate the knowledge and information, they are equally anxious and curious to get feedback in terms of what is working and what is not. Experience from the Poverty Hearings clearly shows that in cases where the communities are being represented by a third party, such as a development practitioner, the feedback loop may be incomplete or delayed. At times the challenges facing a community or communities are part of a bigger problem. So when feedback comes back to the community it may be less direct and convoluted with other issues. The implication of this is that it erodes community hope and trust in the whole process.

To minimise the distortion, African Monitor has endeavoured to involve Poverty Hearing community members in the advocacy process so that they champion their own messages and are involved in processing and owning the feedback. By supporting them to participate at the different platforms, the community (through their champions) has been

❓ *We can take voices to the various levels but how this comes back down again can become distorted or is ignored – what implications does this have for representation?*

responsible for follow-up and feedback. In previous Poverty Hearings, community members have been openly invited by Ministers and Councillors to strengthen existing working groups dealing with the issues. African Monitor has supported them technically to ensure they meaningfully involved in the process. In instances where policymakers make promises, African Monitor ❸ has worked together with the communities to ensure they are realised. This is one way of minimising the challenges of incomplete feedback loop.

Conclusions

These reflections highlight some of the difficulties and opportunities in using participatory research with highly marginalised and extremely poor people to influence policy. Although the particular methodologies differ, they both demonstrate the importance of seeing representation as a grounded process. Legitimate representation is not static: it entails a continual process of reflecting back to the people who development impacts the most, those living in poverty and marginalisation, while also engaging policymakers in understanding what matters most.

❸ Find out more about African Monitor's work towards an improved understanding of how development actors can work with grassroots communities to strengthen and sustain their livelihoods on their website (www.africanmonitor. org/).

3.4 How Change Happens: Pulling Together and Closing the Gap

Dee Jupp, Lucy Nusseibeh, Thea Shahrokh and Joanna Wheeler

This contribution is a distillation of collaborative and retrospective reflections on the theories of change which guided *Participate*. It reflects our understanding of what we tried to do within the parameters of the initiative to influence social and political change and why, and a brief assessment of our collective successes and failures.

How change happens: Agency, relationships, risk-taking and empathy

Participate set out with the explicit purpose of influencing the post-2015 debate by facilitating people to do their own research, amplifying their findings and supporting their actions to make change happen. As discussed in the introduction,❶ this was an ambitious and perhaps idealistic aim. In this contribution, we explain the assumptions behind our approach to influence change – many of which have been informed by years of experience in trying (and learning from our failures) to achieve similar results in different contexts.

The primary assumption in our theory of change is that policy change and resultant social gains happen through the process of enabling agency (the confidence and capacity to act) through the building of relationships to sustain changes.

Our understanding of agency and action establishes that people have the potential to play a key role in shaping their own lives and relationships within their families, communities, society, authorities and institutions, even if they are not necessarily aware of this potential. With awareness of agency, can come the awareness of the possibility of making change happen.

Our second focus was building direct relationships between people living in poverty, with intermediaries, and with post-2015 policymakers. Direct relationships between people are central to our theory of change because developing them requires the renegotiation of the power imbalances that permeate the lives of poor and marginalised people.

Both agency and relationships incur risk: the willingness to take risks and actual risk taking. Risk taking occurs because people must step outside of the constructs, roles and identities that are established through discriminatory cultural and political norms and institutions in society. Risk taking, as understood in this way, plays a crucial factor in relationship building and in taking action. This is often overlooked.

While there is frequently an awareness of risks, physical and psychological, to people living in poverty and their representative organisations, we also acknowledged the risks that policymakers are required to take in stepping out of their political ivory towers in order to engage. This includes the risks associated with admitting ignorance, questioning conventional information sources and assuming humility. One of our assumptions is that people are better enabled to take risks when they feel empathy.

Empathy drives change through enabling a connection to the personal, relationships, agency and action, and risk-taking. The explicit connection to the personal is necessary to build relationships grounded in empathy that can make and sustain change. Empathy is the ability to identify and understand another's situation, feelings, and motives. This element has often been missing in policy influence work. But there is clear evidence to support the notion that agency leading to sustained action is strengthened when individuals are personally moved and inspired to commit to change.

Empathy as depicted in our change diagram (see diagram 4).

❶ See Contribution 1.1 – the introduction to this anthology.

Establishing empathy can be like opening a door.

Participate sought to shake up political complacency and fire up an urgency to act on issues by providing real life stories and including visual presentations of people's own views of the issues that affect their lives. The intention was to stir feelings towards action, and a range of approaches, discussed below, were used to try to achieve this. Kotter and Cohen (2002)[2] make a compelling case for what they dub 'see-feel-change' tactics in organisational change which trump the more conventional 'analysis-think-change' approach. Like us, they put behaviour change as the goal, and visualisations which 'evoke a visceral response that reduces emotions that block change and enhances those that support it' as the essential catalyst to achieving this goal. But a catalyst or spark needs to be sustained; policymakers need to be prepared to 'step through the door', position themselves on the side of the poor, and take risks in order to make change happen.

Our theory of change is that working at the level of emotions via a process, event or product will have a direct impact on people's emotions and will thereby stir up empathy, so as to create a recognition (at both the emotional and intellectual level) of a) potential agency b) the urgent need for action and c) the willingness to take the risks involved in this action.

Looking at the graphic we developed to illustrate our theory of change (diagram 4), the four key elements described sit at the centre; relationship building which depends on enhanced agency, risk taking and connecting to the personal (empathy). When these are in place, the theory suggests four long term outcomes should be enabled (as identified through our participatory research): the recognition of rights for all; transformed social relations that facilitate collective action; accountable and democratic governments; and policies and services that respond effectively to the poorest and most marginalised.

Before these aspirations can be reached, the change diagram notes short term actions and responses. We, like others, placed a lot of emphasis on group formation, networking and empowerment among people living in poverty and marginalisation as a means to build solidarity, confidence and inspiration. But we were also aware of the need to support policymakers to enter this common space.

Ultimately, the theory of change that we are establishing requires both policymakers and people in the margins to make new and unfamiliar human connections, to meet in the middle, build relationships and work actively together to make change happen. Finding this middle ground requires movement on both sides to constitute a space where meaningful engagement can happen.

[2] Kotter, J.P., and Cohen, D.S. (2002) *'The Heart of Change'*, Boston: Harvard Business School Press
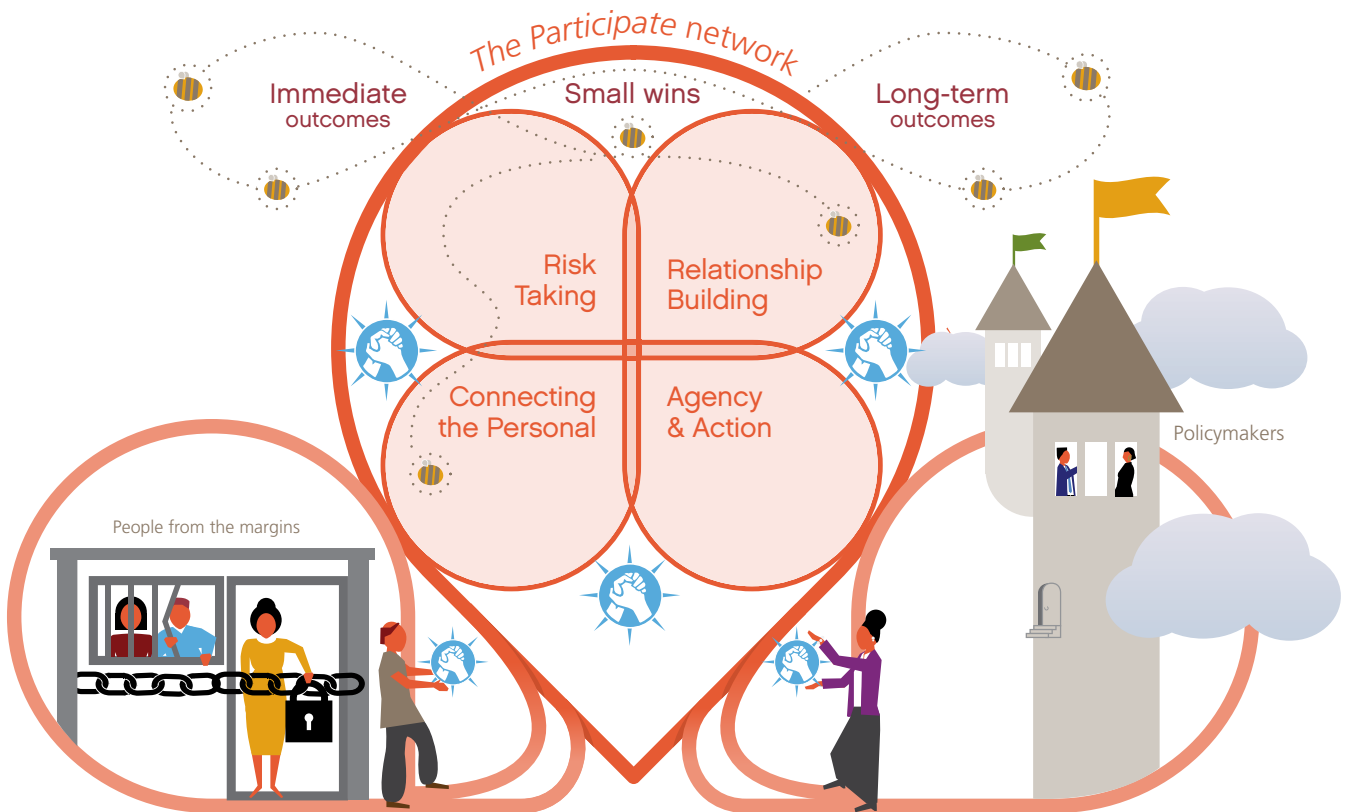

Diagram 4: Understanding how change happens in the Participate process

Drawing, pushing and pulling – but the greatest of these is pulling

How do we get the policymakers out of their ivory towers and provide support for people from the margins to step into that middle ground? The possibilities include drawing, pushing and pulling.

Our slightly mocking graphic (diagram 4) depicts policymakers in an ivory tower in the clouds. From within they feel comfort; a comfort derived from familiar systems, codes of practice, complacency. Having invested much to gain entrance to the celestial city there is little incentive to return to the mundane, the messy, and the reality of those they mean to 'help'. There may be twinges of unease about the discomforts of those outside but the concern is always with the 'bigger picture' and political expediency.

Our theory of change suggests that rather than drawing out or pushing out, the celestial city dwellers needed to be pulled out in order to experience the middle common space. 'Drawing out', the preferred evidence led approach of most policy advocates is not forceful enough and relies on their habit of 'analysis-think-change'. 'Pushing out' would have to come from inside the city, and while this might be possible from a colleague who has already been 'pulled' (e.g. via enthusiasm for the 'immersion process'), this is extremely rare. By contrast pulling out is radical and creates the needed motivation for change. Pulling is a process requiring sustained effort and human connections. Our tactics required pulling them out of their ivory tower and into the middle space, facilitating direct or near direct engagement with the lives and stories of people in the margins.

On the left of the graphic we find people in the margins behind closed doors (diagram 4). These doors have both chains, padlocks and barred windows. Representing the barriers to engagement, these may be externally or internally imposed. While external barriers are widely acknowledged, we also recognised that people living in the margins often self impose their own restrictions. The Reality Check Approach [3] research in Ghana found that there was comfort to be derived from the routine, from familiarity, and, like the celestial city, acceptance of the status quo. Change is challenging, time consuming and, above all, risky. While, people in the margins might be 'drawn' into the middle space by their own curiosity, needs, interests, it can be hard for them to stay without the support given by 'pulling'. Pushing may be counterproductive leaving people feeling lost, out of their depth, confused by the systems which operate in the 'middle ground'. The tactic of pulling, especially pulling together, has the potential to provide support, confidence and guidance.

When people on the margins and policymakers from the celestial city take the risk of going to a middle ground, there is the possibility to build relationships that are based on mutual understanding and respect, and open new avenues for taking further risks required to change the status quo.

How *Participate* worked on the key elements for change

In our effort to encourage 'pulling together', we used the four elements at different levels of the work in *Participate*. The following examples share insights on how our theory of change played out in practice through two examples: the participatory research with people living in the margins itself; and the activities and processes we used with policymakers.

Example One: Participatory research: pulling together

Participatory methods provided the necessary drawing, pushing and pulling but, in particular, relied on collective pulling together. The participatory nature of the approach forges relationship building between those living in poverty and in the margins with similar interests, via external facilitators and encourages action and engagement outside the group with allies and those who can facilitate change. It empowers people to take action themselves armed with their own evidence and analysis.

The methods recognise the risks people take in sharing their stories; and facilitators actively mitigate apprehension and mistrust. Traditionally case stories are protected by pseudonyms and anonymity but in *Participate* most people were proud of telling their stories and felt empowered to be part of a process of influencing change. Digital storytelling, [4] performing their own dramas and making their own films [5] are empowering processes in themselves, and provide outputs which can be shared directly with outsiders to enhance understanding and empathy for people living in poverty and marginalisation. People trusted their interlocutors with personal and moving insights, hoping that sharing their stories would result in change, if not for them, then for others like them. Networking and building solidarity contributed much to their ability to take these risks.

We also recognised two major areas of concern in using these methods: 1) participatory processes can be discouraging for participants by taking up a lot of their time and not fulfilling expectations, or perpetuating existing hierarchies; 2) participatory processes can be a way of co-opting marginalised people into doing what the government should be doing anyway and letting institutions that should be responsible 'off the hook'.

Example Two: Pulling policymakers

Participate attempted to build empathy and relationships for change with policymakers. Engaging policymakers with stories and lived experience of people in the margins was somewhat successful and

[3] Find out more about the research from the Reality Check Approach in Ghana on their website (www.reality-check-approach.com/reality-checks/ghana-2/ghana/) and in the *Participate* global synthesis report 'Work with us', page 78 (www.participate2015.org/publications/work-with-us-how-people-and-organisations-can-catalyse-sustainable-change/).

[4] See Gill Black and Pelagia Tusiime's reflections on digital storytelling in Contribution 2.1 Methods and Challenges in Using Participatory Processes in Diverse Contexts: Bridging the Gap Between Community Reality and Policymaking.

[5] See Michelle Kahui and Jackie Shaw's reflections on PV in contribution 2.1 Methods and Challenges in Using Participatory Processes in Diverse Contexts: Bridging the Gap Between Community Reality and Policymaking.

Diagram 5:   in the Participate immersions process

excited interest but mere acknowledgement of these stories, even perhaps to some extent being moved by them was not the 'visceral response' we felt was needed to create urgency for change.

One example of how difficult it is to pull policymakers into this middle ground was the failure of any take up of our immersions programme. We planned a major immersion programme for policymakers, especially members of the UN High Level Panel (HLP) on post-2015 and their special advisers. Detailed briefing notes were provided explaining that they would be staying with families living in poverty for a minimum of two nights and would be expected to engage fully in household activities and would, as far as possible, not be treated as guests. Responses ranged from polite decline to excuses and claims such as 'give my place to someone else as I have worked with marginal people' and 'coming from a developing country I have first hand experience with poverty all my life' (diagram 5 above). The failure of the immersions stream led to much reflection within *Participate* about policymakers and policymaking. We collectively came round to a better understanding of their position and constraints; seeing them less as 'them' whom we had to influence and more as people who also needed support to step out of the confines of their situation; who also need safe spaces and nurturing to enable them to do things differently and to take risks.

Many of our activities (GLPs, documentary film, exhibition, immersions, and so on [6]) were designed to affect both sides – a recognition from people in the margin that 'big people' can experience their lives and will listen; and from policymakers that 'feeling it' is different from 'knowing it' (if indeed they do know it). We wanted both sides to interact as human beings first and foremost, and connect on this level. This is the meeting in the middle, which allows the relationships to shift and for further, mutually supported risk taking.

Buzzes – recognising small successes

Our diagram (diagram 4) indicates a number of buzzes emerging from the people living in the margins. These represent significant 'wins' where the four elements have successfully created interest for change. These literally create a 'buzz'; people talk about them; they result in subtle but significant shifts in language; in small shifts in power relations; in small gains in awareness; and it fuels further action by providing confidence that there is 'someone out there listening'.

Some of *Participate*'s buzzes have been due to innovative participatory methods of engaging people in the margins, some have been through carefully planned media events where unexpected and compelling stories were shared and visualised, [7] [8] some have been through 'reports with a difference' which highlight people's stories and take the side of people living in poverty. But we also have to acknowledge serendipity. There were a number of lucky moments during the *Participate* process. The lesson here is to be flexible enough both in terms of financing and agility to respond to these lucky moments and exploit them.

Worries and challenges

In building an understanding of the processes of change in the *Participate* journey, our reflections have highlighted a number of ongoing concerns and challenges that further establish the risks and barriers present within complex processes of social change.

- Despite claims that this UN process is regarded as having been the most consultative of any, there was evidence of tokenism. We were informed that David Cameron, the UK Prime Minister and Joint Chair of the HLP, viewed the consultation process with enthusiasm. He wanted the Panel to 'talk to people'… however, talking did not necessarily mean listening. [?]

Buzzes as depicted in our change diagram (see diagram 4).

- We felt very great concern that information generated by people might be taken out of context or distorted. It is very easy to evoke different meanings by use of quotes and short stories – included in short, sharp policy-briefings – when they are de-contextualised and disembodied from context and the reality.

- We were also very concerned about the safety of the courageous research participants. Expressing an opinion, taking a stance or revealing one's status can have serious consequences. These are socio-political acts and can lead to social exclusion, repression and punishment. For those engaging in supporting change through participatory research, relationship building, agency and action, these risks must be fully recognised and thought through.

- *Participate* purposefully used innovative participatory methods and innovative means for communicating and influencing policy. The formulaic and routine will never have the resonance that eye-catching, compelling, engaging interactions will have. We have to continue to push boundaries, challenge and encourage policymakers at a deep level to connect their emotions as well as their rational selves. ❓

- There were several examples of voices from the margins which did not easily sit with the position of the researchers involved, for example, mothers in Ghana rejecting family planning because they love motherhood, examples of girls outperforming boys in school. We, as researchers in development, have to be reflexive and examine what we bring to the process, what we reject and what we promote. For the process to be legitimate, un-mediated voices need to emerge.

- There is a need to minimise unrealistic expectations. Despite the unusual and privileged opportunities *Participate* had to interact with HLP and the UN policy process, it was only one small effort among others. Change is often a slow process and we need to make sure all those involved know this. We need to celebrate those small wins and buzzes to keep up morale and not get swamped by the enormity of the task.

Conclusions

Our reflection process surprised us by highlighting the similarities in the requirements for both people living in the margins on the one hand and policymakers on the other to engage in the middle ground, essential to policy and social change. As the graphic representation evolved, we realised more acutely how the two sides mirror each other.

We need to ask how, in the future, we can better understand the constraints and limitations of those in high level policy positions and how we can work to connect them better to the knowledge and experiences of marginal groups. The pressures on these decision-makers create a form of reverse isolation and marginalisation, which separates them from the people most impacted by policy decisions. We know that small shifts in power, language and awareness can catalyse a larger shift towards the realisation of rights and social justice for all, but how do we best create the conditions for respect of voice, and seize on key political moments? Our experience suggests that key political moments can be seized when the middle ground is accessible and relationships can be put in motion that will actually support changes to happen.

Our experience suggests that the 'analysis-think-change' process alone is insufficient: 'see-feel-change' is needed for transformative behaviour change. If this is so, then participatory research and associated relationship building is pivotal. We need to test how those small changes in use of language, small shifts in power and awareness were affected. Did the digital stories or participatory films speak directly to the emotions of those engaging with the story, so that their perception of the people involved became more connected, catalysing interest, or curiosity, or maybe perhaps concern? Perhaps the reluctance to participate in immersions lay in the concern of being challenged viscerally and urgently and of not being able to respond to this? Empathy led advocacy is difficult to ignore as your humanity and compassion is in the spotlight.

❓ *Sometimes getting noticed is easier if you ignore human connections. How can we make human connections the cause and an effect of getting noticed?*

Chapter 3 author biographies

Lisa van Dijk is Director of Programs for the Center for Development Services in Cairo, Egypt with 12 years experience in Africa, Asia and the Middle East. She led the Youth Participate project in Egypt and Jordan to contribute to the post-2015 debate, and the Ground Level Panels in Egypt.

Steve Abah is Professor of Theatre for Development at Ahmadu Bello University, Zaria, Nigeria where he has taught since 1979 and is the coordinator of the Theatre for Development Centre. His specialities are in Theatre for Development (TfD) and participatory development approaches. Within *Participate*, he trained HEPS-Uganda in TfD.

Danny Burns (Full biography p.44)

Carlos Cortez Ruiz is Professor at the Autonomous Metropolitan University in Mexico, working with community based organisations in the poorest regions to generate strategies for change. His work focuses on action research and on linking universities to society, with an emphasis on participatory methodologies for social change.

Neva Frecheville is the lead policy analyst on the post-2015 development agenda for CAFOD (Catholic Agency for Overseas Development). She co-chaired the global civil society campaign, Beyond 2015 from 2012-2014 and acted as the link between the campaign and *Participate*, convening *Participate's* advocacy work stream.

James Kofi Annan is the founder and President of Challenging Heights, a grassroots NGO dedicated to tackling child slavery in Ghana and member of Participate's PRG. He has been honoured with a number of international awards for his work, including the World's Children's Prize in 2013.

Pradeep Narayanan is Director, Research and Consultancies, at Praxis Institute for Participatory Practices, New Delhi, India. He has 17 years of experience in participatory research. He led and facilitated processes that Praxis has been involved with in the post-2015 debates, including the Ground Level Panel, participatory videos, research and discussions.

Andrea Rigon coordinated *Participate's* research activities for COMPASS 2015, and worked on the *Participate's* policy and advocacy strategy. He teaches social development practice at University College London. He has over eight years of research and work experience of urban development in Sub-Saharan Africa.

Mwangi Waituru is the director of the Seed Institute and was co-chair of the Beyond 2015 campaign from 2012-2014. At the Seed Institute, he uses participatory multimedia technologies such as vernacular music, digital storytelling, and participatory video in policy research and advocacy.

Matt Davies is regional coordinator for the International Movement ATD Fourth World in Latin America and the Caribbean. He has worked with ATD Fourth World for over 20 years, especially on grassroots participatory projects with people in extreme poverty in the UK, Spain and Guatemala. He currently resides in Mexico.

Clive Robertson (Full biography p.44)

Jackie Shaw (Full biography p.44)

Masiiwa Rusare is a Program Manager with African Monitor, and is an experienced researcher and practitioner working in Zimbabwe and South Africa on economic and development issues covering international and regional trade policy, community capacity building and empowerment to participate in development, and growth economics.

Dee Jupp was the immersions stream convenor for *Participate* responsible for promoting and engaging policymakers in immersions. She was also a key facilitator of the Reality Check Approach initiative in Northern Ghana. She had more success with the latter than the former!

Lucy Nusseibeh implemented a participatory video project for *Participate* with Palestinian women in two villages (Jib and Nebi Samuel) severed from Jerusalem by the Israeli separation barrier. She is the founder and executive chair of Middle East Nonviolence and Democracy (MEND) and director of the Institute of Modern Media at Al-Quds University.

Thea Shahrokh (Full biography p.24)

Joanna Wheeler (Full biography p.24)

Through their involvement in participatory processes people living in poverty in Brazil took the risk of raising their voice to policy

The Participate network came together for the reflection and learning process that informed this anthology at the end of 2013

Thea Shahrokh and Joanna Wheeler

This anthology has drawn together reflections, both collective and personal, on the experiences of using participatory research to try and influence policymaking processes, including those at the global level.

Through the process of compiling this anthology we have been inspired and challenged by people living in extreme marginalisation and poverty to take these lessons forward; we have become clearer about our own assumptions of how change happens and what we can contribute; and we have also been able to shed light on the gaps that persist in trying to connect people in order to shift power in policymaking.

The achievements through the network have been substantial. In a period of 18 months:

- 18 organisations produced their own in-depth participatory research with extremely marginalised groups, using a wide range of participatory and creative approaches

- *Participate* developed a collective framework for analysis and synthesised this research into a coherent report connecting all 18 studies

- Collectively, the network has developed a sense of mutual learning and experimentation, especially around methodological innovation

- Four Participatory Research Group (PRG) members hosted Ground Level Panels, connecting the global policy debate to their local and national processes

- Through the collaboration with Beyond2015, the research from *Participate* has been distilled into policy messages and used directly to influence the post-2015 process. At the same time, each research process has generated its own engagement at local, national, regional and global levels

- The material produced through the research contributed to a multi-media exhibition allowing policymakers and others to hear directly from the research participants in their own words, through images, film, and stories

While these are important achievements in and of themselves, perhaps the truly enduring contributions of *Participate* lie in the changes in the people involved along every stage of the process. At our final reflection workshop, John Gaventa acting as a critical friend shared his own experience of the long-term impact of large-scale participatory research: despite some policy 'wins', the most lasting changes were with those involved in the process itself. People gained new skills, perspectives and knowledge on how they could contribute as researchers and practitioners in promoting change, and took those lessons into other areas of work. Those deeply involved in the work of *Participate*, from research participants, to policymakers, to researchers and advocates, will continue to work for social justice and more democratic development – and we will have new knowledge and experience to draw upon.

Participate has demonstrated the power of networked knowledge to address pressing questions in global policy arenas. This anthology has shown how networked knowledge can be transformative – when the right conditions are in place.[1] Networked knowledge is transformative of the people involved in the process, and recognises the role of researchers as advocates and mediators in connecting knowledge into different spaces and debates. It can be transformative of policies and practice, when the knowledge is positioned in relation to its context and used to challenge complacency. Importantly, networked knowledge is transformative of networks themselves – the *Participate* network has developed through collaboration, and the relationships built have the potential to evolve and strengthen further.

There have also been real and significant advances in participatory methods through the work of *Participate*. This includes developments within particular approaches such as digital storytelling, participatory video, and participatory inquiry; but also advances in how to innovate methodologically within a network in order to increase the weight of individual pieces of research.[2] Part of the methodological advances have related to the possibilities for more authentic and legitimate representation of individual/community experiences and knowledge at global policy levels. None of these elements have been without tensions, challenges, and failures, but on balance there is a strong sense of achievement within the initiative.

Through *Participate*, there have been many examples of how the research process has enabled new spaces to be claimed for influencing policy. [3] This anthology includes examples of where we generated influence in local, national and international spaces through building relationships and connecting individuals in very strategic ways. [4] This includes the relationships within the network itself, which have a relevance beyond this particular moment of global policy, and which have the potential to continue to contribute to change over the long term. [5]

We conclude with recommendations for future practitioners, advocates and supporters of participatory research for policy influence, based on our experience in *Participate*:

1. Continue to champion participatory research as a means to help people in the margins gather their own evidence, present their own viewpoints and work together to build relationships with policymakers and service providers to identify more appropriate solutions to problems and to help them realise their rights.

2. Promote a '**see-feel-change**' approach over the prevailing 'analyse-think-change' paradigm as an effective means to create the empathy needed for change. Whilst enhancing the empathy of policymakers has been tested under *Participate*, there may be value in helping people in the margins to better understand and empathise with the position and constraints facing policymakers as well.

3. Recognise that urgency, passion and commitment emanate from the 'see-feel-change' approach and that these are the greatest catalysts for change. Seize serendipitous opportunities to maintain urgency. Numbers, reports, and statistics alone rarely spawn urgency.

4. Recognise and support methodological experimentation, creativity and new uses for technology in research approaches of this kind. What is possible can be expanded and changed, but only if innovation and risk-taking is encouraged.

5. Give more weight to understanding the constraints and impediments which prevent policymakers from engaging with the reality of poverty. Recognise the risks, both personal and political, and creatively find ways to help them to engage directly and to challenge received wisdom (including creating safe spaces to doubt).

6. Exercise care to ensure that people living in the margins champion their own causes, raise their own voices and use ways they find most appropriate and effective to influence change, and are not exploited for other's ends. Keep constant vigilance that external actors remain as facilitators not managers of processes of change.

7. Continue to support initiatives like *Participate* which bring together participatory research experiences and enable collective and collaborative reflection around supporting conditions for change.

Chapter 4 author biography

Thea Shahrokh (Full biography p.24)

Joanna Wheeler (Full biography p.24)

[1] For further exploration of these issues see Contribution 1.2 Networked Knowledge as Networked Power: Recovering and Mobilising Transformative Knowledge Through *Participate* and Contribution 3.4 How Change Happens: Pulling Together and Closing the Gap.

[2] See the contributions in Chapter 2 Starting with people: Learning from participatory practice.

[3] See the introduction to Chapter 2 - Starting with people: Learning from participatory practice.

[4] See contributions on innovations in bridging the gap between grassroots realities and policy makers in Contribution 2.2 Participatory Approaches and the Policy-Practice Interface: First Person Narrative Reflections.

[5] See Contribution1.4 Reflections on Collaboration in the *Participate* Network: First Person Narrative Reflections.

Participate Participatory Research Group map

The Participatory Research Group (PRG) is a network of organisations committed to bringing knowledge from the margins into decision-making at every level of society. The participatory research projects shown here gathered perspectives on the post-2015 debate from the people most affected by poverty and exclusion.
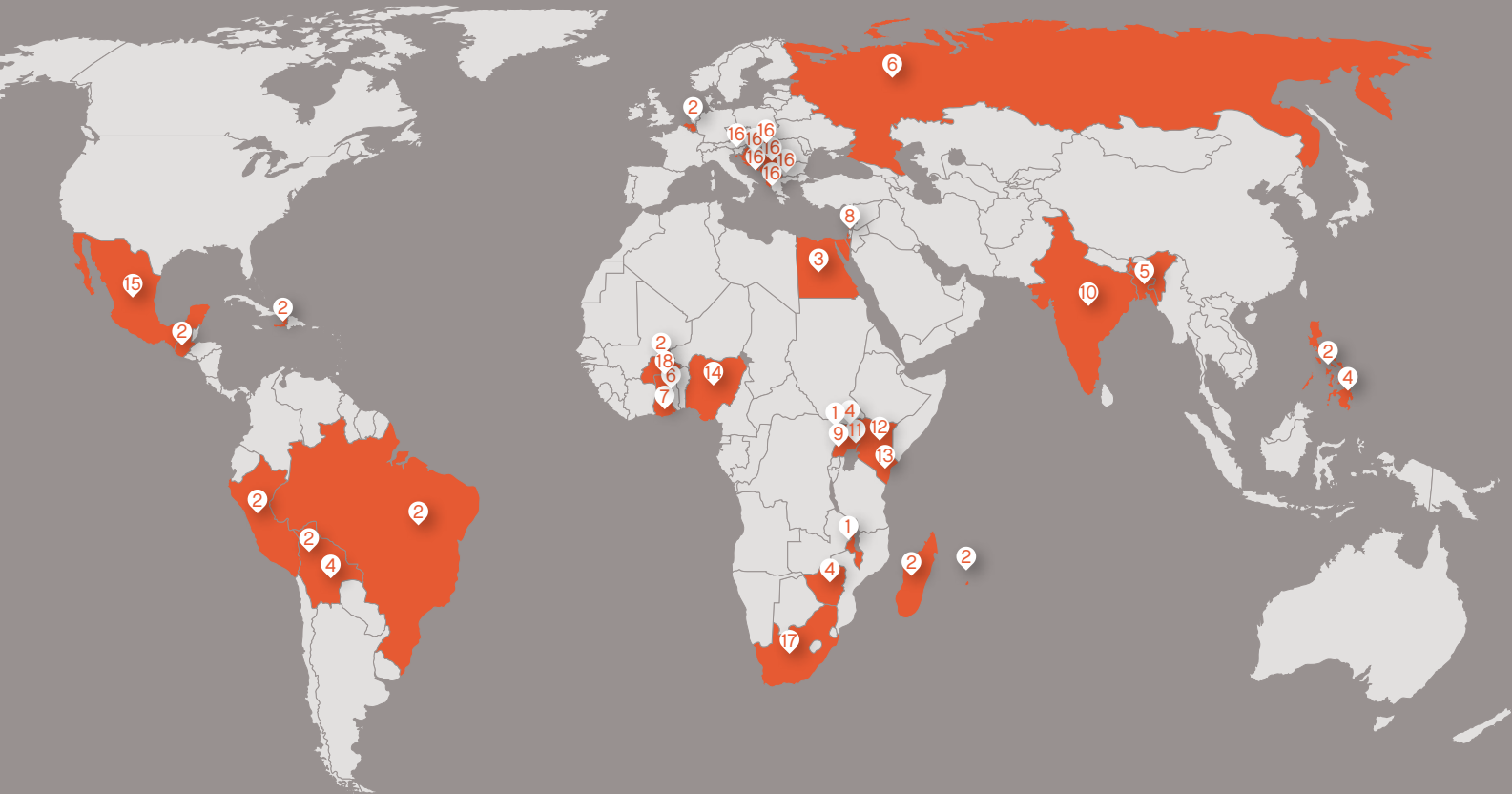
1. African Monitor

2. International Movement of ATD (All Together in Dignity) Fourth World

3. The Center for Development Services (CDS)

4. COMPASS 2015 (joint project)

5. ADD International, Alzheimer's International, HelpAge International and Sightsavers

6. Family for Every Child (FFEC)

7. The Ghana Community Radio Network (GCRN)

8. Middle East Nonviolence and Democracy (MEND)

9. Coalition for Health Promotion and Social Development (HEPS) Uganda

10. Praxis – Institute for Participatory Practices

11. Restless Development

12. Spatial Collective

13. The Seed Institute

14. The Theatre for Development Centre (TFDC)

15. Universidad Autónoma Metropolitana Xochimilco (UAM-X)

16. Oneworld- Platform for South East Europe Foundation (OWPSEE)

17. The Sustainable Livelihoods Foundation (SLF)

18. Reality Check Approach (RCA)

See more detail about the PRG group members on the following page.

Participate Participatory Research Group

	Research Partner	Organisation description	Countries	Research
1	African Monitor (Based in South Africa)	*Supports community monitoring of development commitments at the grassroots level and works to bring African voices into policy debates.*	Malawi, Uganda	Poverty Hearings are used as a powerful mechanism to connect the voices and experiences of people living in poverty to decision-makers.
2	International Movement ATD (All Together in Dignity) Fourth World	*Works with those most affected by extreme poverty to exercise their fundamental rights and fulfil their responsibilities.*	Burkina Faso, Madagascar, Mauritius, The Philippines, Peru, Haiti, Guatemala, Bolivia, Brazil, Belgium	Through interactive workshops, people in extreme poverty bring their own knowledge together with decision-makers' to create proposals to eradicate poverty and ensure human rights for all.
3	The Center for Development Service (CDS)	*Generates participatory development interventions that enable people and organisations to use their resources effectively to improve standards of living.*	Egypt	Youth-led research enables young people to reflect on the realities they face, and develops these reflections into a basis for action.
4	COMPASS 2015 (joint project)	*CAFOD works with partners globally to bring hope, compassion and solidarity to poor communities to end poverty and injustice.* *UNITAS (Bolivia) is a network of community based organisations (CBOs) and non-governmental organisations (NGOs) promoting grassroots' participation in the analysis of public policies.* *Ecoweb (Philippines) addresses inter-linking challenges: poverty, social relations, environment and poor governance.* *Poverty Reduction Forum Trust (Zimbabwe) promotes evidence-based policy formulation and dialogue on issues of poverty reduction and sustainable development.* *Justice and Peace Commission, Soroti Archdiocese (Uganda) works on inter-community peacebuilding initiatives among pastoral and peasants communities.*	Zimbabwe, Bolivia, Uganda, Philippines	COMPASS 2015 is a participatory research project designed to include the perspectives of those living in poverty in the post-2015 process. Research is carried out by partners in four countries with urban dwellers, indigenous communities, farmers, people affected by natural disasters, and children.
5	Voices of the Marginalised	*ADD International, Alzheimer's Disease International, HelpAge International and Sightsavers* *This consortium of international and national organisations shares a goal of reducing the social, economic and political exclusion of older people, people with disabilities and with mental health problems.*	Bangladesh	Through the 'Voices of the Marginalised' project people with disabilities, older people and people with mental health issues in Bangladesh are identifying the problems associated with exclusion and are undertaking a cycle of research and action to explore those issues.
6	Family for Every Child (FFEC) Network and Challenging Heights in Ghana	*Global network of organisations working towards a world where children grow up in a permanent, safe, caring family or be provided with quality alternative care.*	Ghana, Russia	Child-led research will enable the voices of children outside of parental care or extremely vulnerable to the loss of parental care to be heard in the post-2015 debate.
7	The Ghana Community Radio Network (GCRN)	*National association of community radio stations in Ghana broadcasting in local languages across rural communities, supporting sustainable development.*	Ghana	GCRN innovates through participatory approaches to enable local knowledge combined with the power of radio to build strong and engaged communities.
8	Middle East Nonviolence and Democracy (MEND)	*Palestinian NGO based in East Jerusalem dedicated to promoting the practice and principles of active non-violence.*	Occupied Palestinian Territories	Acutely marginalised women from this context are making a film that includes their own voices, communicated as they choose, on issues they have selected.

	Research Partner	Organisation description	Countries	Research
9	Coalition for Health Promotion and Social Development (HEPS) Uganda	*Health rights organisation that advocates for increased access to affordable essential medicines for the poor and most vulnerable people.*	Uganda	This pilot project addresses health inequity in Kampala's poorest slum by exploring the potential of increasing community-generated research findings.
10	Praxis - Institute for Participatory Practices	*Organisation committed to mainstreaming the voices of the poor and marginalised sections of society in the process of development.*	India	Praxis is working with the urban homeless in Tamil Nadu to increase their visibility and voice using Shelter Monitoring Groups and participatory enumeration.
				Voices of sex workers and sexual minorities in Tamil Nadu, Karnataka and Maharashtra will be brought into the post-2015 discussions through films made by these groups and through participatory research and analysis with community-based organisations of these communities.
11	Restless Development	*Youth-led development agency with a mission to place young people at the forefront of development.*	Uganda	A youth-led action research process is exploring youth livelihoods in the Karamoja sub-region of Uganda.
12	Spatial Collective	*Social enterprise that uses mobile technology and mapping to support collective action in slums.*	Kenya	Youth mobilisers in Mathare slum, Nairobi are using participatory mapping and community visioning methods to understand how local residents see change happening.
13	The Seed Institute	*Working to mobilise community members to take action against poverty. Through participatory research, it is ensuring that those marginalised inform the post-2015 agenda.*	Kenya	The Seed Institute provides a platform for children across Nairobi's poorest communities to express their aspirations, without fear, using film and drawing.
14	The Theatre for Development Centre (TFDC)	*Promotes social development by sharing the power of participatory development strategies with policymakers, civil society and researchers.*	Nigeria	Using public drama, stories and film, TFDC is working with communities across Nigeria to increase transparency and accountability in governance.
15	Universidad Autónoma Metropolitana Xochimilco (UAM-X)	The *Interdisciplinary Development Research Programme on Human Development at UAM-X focuses on the construction of holistic social strategies for change.*	Mexico	Working with community-based organisations and NGOs across the poorest regions of Mexico to collaborate with indigenous people to plan for alternatives for their own development.
16	Oneworld- Platform for South East Europe Foundation (OWPSEE)	*Civil society network connecting communities from the region and enabling their interaction on issues for positive social change.*	Albania, Bosnia, and Herzegovina Croatia, Kosovo Macedonia, Montenegro, Serbia	Working through visual methods to expose issues and build opportunities for action with extremely marginalised groups in the Western Balkans.
17	The Sustainable Livelihoods Foundation (SLF)	*Strengthens livelihoods and resilience among marginalised communities through conducting cutting edge research, participatory engagement and fostering innovative development.*	South Africa	Building partnerships with communities to build capacity in visual participatory processes that promote dialogue and engagement on invisible issues.
18	Reality Check Approach (RCA)	*A research approach that aims to better understand how development policies and practice affect ordinary people.*	Ghana	Understanding change experienced by households as a result of a planned and integrated set of health, education and agricultural development interventions.

Participate

Knowledge from the margins for post-2015

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