PASED

*L*EARNING

FOR

*E*MPOWERMENT

*A*GAINST

*P*OVERTY

ORGANISATIONAL TRAINING

MANUAL

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PART ONE

TRAINING OVERVIEW

INTRODUCTION: GOALS OF THE TRAINING

LEAP's strategy for poverty reduction and women's empowerment through enterprise development is based on development of strong, community-managed women's organisations federated from local to regional level. This means building on women's existing strategies and networks and supporting them to become effective organisations to bring about those changes which women themselves prioritise.

The organizations must also be based on a number of core principles which underlie the LEAP program:

▶ *gender equity*

▶ *economic and social inclusion of the extremely poor and disadvantaged*

▶ *participation and collective action*

▶ *networking and constructive engagement with outside institutions to bring about broader change*

The training has a number of interlinked and mutually reinforcing goals for the groups, individual members and the LEAP programme as outlined in the Box below. The training will be conducted as each group is formed. The modules take groups from discussions about:

▶ *why they have come together as a group*

▶ *what they hope to achieve*

 through

▶ *examining issues of economic and social inclusion and how to increase it*

▶ *participation and leadership and setting group norms*

▶ *widening networks and influence for effective collective action*

 to

▶ *a concrete 'Road Journey' or pictorial representation of a strategic plan against which progress can be tracked over time.*

The process itself is designed to ensure that women have participatory skills, strengthen group cohesion and develop the group identity. Gender issues are integrated throughout, as are issues of economic and social inclusion and tolerance and developing a sense of group self-reliance and networks between groups.

GOALS OF THE TRAINING

FOR THE GROUPS

- To decide **group aims and objectives and how these might be achieved**, including empowerment and inclusion and objectives.

- To teach group **organisation and participatory skills and establish group norms** which will then be carried on by the groups following the training.

- To teach key **Participatory Action Learning System (PALS) diagramming and analysis skills** which can be used by individuals and by the group following the training.

- To establish **concrete targets and means of tracking** achievements and challenges.

FOR INDIVIDUAL GROUP MEMBERS

- To develop participation skills to increase ability to communicate in a group, listen to others and negotiate.

- To ensure equal participation in group decisions.

- To identify ways in which individual needs may be met through collective activity.

- To develop PALS diagramming and analysis skills which can be used for individual learning and planning.

FOR THE LEAP PROGRAMME

- To teach PALS diagramming and analysis skills which can then be used in other trainings and for groups to monitor their own progress.

- To establish common criteria and indicators between the different Centres and the programme for monitoring and assessing programme effectiveness.

- To establish baseline information for the group monitoring system.

A key feature of the training is the introduction of Participatory Action Learning System (PALS) diagram tools. These enable women with no or low levels of literacy to fully participate in group decisions and also to keep individual records useful to them. The PALS process, integrated into training, planning and monitoring and impact assessment, aims to empower women and groups to do their own analysis and research on issues of importance to them.

The training will be further reinforced and feed into the series of annual fairs which will enable women to exchange plans, ideas and experiences with groups in different parts of Port Sudan. This will then enable the group level planning to become part of a much larger organisation capable of really supporting women to attain at least some of the visions they identify.

This organisational training is the first of a series of PALS-based trainings planned under the LEAP programme. Other PALS-based trainings currently planned over the first two years include:

- *Financial analysis and economic planning* training to enable women, and program staff, to analyse their livelihood activities, identify ways of increasing incomes and plan credit use and access to skills training. This will incorporate gender analysis at all stages.
- *Women's rights training* will examine women's own visions for their rights and responsibilities within the household and community, how these relate to women's rights in Islam and in international agreements and identify individual and collective strategies to achieve their vision. Parts of the training will also invite men and local community leaders.

DESIGN OF THE MODULES

The training is designed in six modules for groups of 10-20 women who will be in the same local group. All members will receive the training together, although some new members may join during the course of the training. Some system will have to be devised for ensuring that any new members after this date are trained by the other members in both the tools and the procedures and plan decided. Alternatively the material can be adapted at a later date into a general ' new members training' to be conducted for new members of different groups.

The training is designed to be incorporated into the initial meetings for formation of Women's Centres and groups. Each module should be conducted as one 3 hour session which can be conducted weekly or monthly depending on women's own requirements. Between each session members will be given issues to discuss between themselves to bring to the next meeting to follow up on each Session and provide continuity and develop member presentation skills.

Two facilitators are needed: one to chair the session and keep time, the other to take charge of documentation.

MODULE OVERVIEW

MODULE 1: ORGANIZATION ROAD JOURNEY

- ► *To clarify everyone's expectations and dreams for the group.*
- ► *To reach consensus on 3 priority achievable goals to form the basis for training discussions.*
- ► *To understand how people came together and past experience of groups and organization.*
- ► *To begin discussion of ways forward and future opportunities/ challenges.*

MODULE 2: INCLUSION DIAMOND

- ► *To examine different types and levels of poverty and social exclusion.*
- ► *To identify current levels of inclusion within the group.*
- ► *To look at reasons for low inclusion of the very poor and other marginalized groups and possible solutions.*
- ► *To establish targets for increasing inclusion to be tracked over time.*

MODULE 3: PARTICIPATION DIAMOND

- ► *To examine group structure, leadership and norms*
- ► *To discuss different types and levels of participation*
- ► *To identify how many people are participating at the different levels and reasons for low participation and differences between members*
- ► *To establish targets for increasing participation and equity in the group.*

MODULE 4: PROBLEM/SOLUTION TREES

- ► *To investigate in much more detail the reasons for problems and potential solutions relating to the 3 goals identified.*

MODULE 5: INSTITUTIONAL NETWORKING ANALYSIS

- ► *To identify the different types of institutions in a community which might be important in achieving the 3 goals identified.*
- ► *To identify which institutions are already represented within the group or with which group members have contacts.*
- ► *To identify those key institutions which could be influenced and approached for advocacy and lobbying and how this might be done.*
- ► *To decide concrete steps for widening networks and contacting institutions to achieve the goals.*

MODULE 6: BRINGING IT TOGETHER: STRATEGIC ROAD JOURNEY

- ► *To revisit first road journey and incorporate conclusions of the previous sessions.*
- ► *To identify realizable staged targets for the future which will be tracked over time.*

More than one group can be trained at the same time, e.g. bringing all the groups to the Women's Centre. However each group must have its own space and facilitator. If more than one group are trained together, this will allow also a short at the end for groups to exchange their ideas and conclusions.

The modules have also been designed to be empowering in the sense of:

▶ opening up the choices available to women *(power to)*,

▶ increasing confidence *(power within)*

▶ acknowledging and addressing power relations which constrain them *(power over)*

▶ developing agreed collective strategies *(power with).*

Each module follows a pattern of 'Empowering Enquiry[1]':

▶ *Establishing differences of opinion and how consensus can be reached (through the energizer and then the participatory process described below).*

▶ *Visioning change, possibilities and choices*

▶ *Discussing and appreciating what people have already done*

▶ *Identifying challenges*

▶ *Identifying concrete steps forward and assigning roles*

▶ *Agreeing criteria for tracking successes and 'challenges'*

The diagrams produced remain with the groups for periodic revisiting. Following the training the groups can follow up on further issues as required through using the same diagrams, supported by other Women's Centre members and/or LEAP staff.

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[1] For details of 'Empowering Enquiry' see the relevant page on the LEAP website and Mayoux 2003 in the Resources at the end of this Training.

PARTICIPATORY PROCESS GUIDELINES

The meetings themselves must be conducted according to participatory principles in order to continue to build women's participatory skills which will then become second nature for any meetings following the training. This includes discussion of gender issues and constraints, and continual awareness of the need for economic and social inclusion.

The registration process at the beginning of the training, and conducted for any new members who join is extremely important. Also the ongoing monitoring of the training by each member. Sample registration forms and an evaluation chart are given in Part 3. These are both described below. These will enable participation in the sense of attendance and satisfaction to be tracked during the training itself.

Each meeting should be facilitated along the following lines:

► *Any new members should be identified, welcomed and registered.*

► *Participatory energiser:* Begin all sessions with some sort of pairwise energiser which encourages people to talk to people they do not know so well and to encourage people who might not otherwise speak to come forward. People should first discuss what they remember of the previous session and anything which has happened since, and then ideas about the topic in hand as specified in the Module. Each person reports back what their partner has said. This develops listening and sharing skills and also increases people's understanding of each other's point of view.

► *Everyone is respected and equal:* Make it clear to everyone that everyone's word is to be valued and respected, particularly the views of those who may be more disadvantaged than others in the group. This requires constant awareness on the part of people who may be more articulate and literate. Some group norms need to be established in Module 3 and then monitored.

► *Passing the 'microphone':* Introduce some sort of tool like a stick, or some groups prefer a banana or other object to represent a microphone. It is only the person holding this tool who is allowed to talk. It is then possible to ensure that everyone has a turn to hold the stick and limits on the numbers of time or length of time anyone can hold it can also be introduced.

► *Make sure everyone has contributed:* at the end of each stage anyone who has not spoken or drawn on the diagram must be

given the 'microphone' or pen and encouraged to comment/draw on the diagram.

▶ *Evaluation and attendance registration:* before leaving everyone should mark their attendance and degree of satisfaction with the session. Reasons for non-attendance of members should also be explained, but with the aim of understanding attendance problems and how they might be addressed rather than policing.

All the diagrams remain with the groups and past diagrams should be pasted on the wall for reference at the beginning of each meeting.

It is stressed that participation also brings the responsibility to contribute. The homework after each session is designed to not only reinforce the discussions, but also to develop self-reliance and group networking both between members and between the group and other networks and institutions. In this way the participatory process aims to be self sustainable as the basis for a long-term process of collective action for change and poverty reduction.

ENVIRONMENT AND EQUIPMENT

The physical environment for the meetings is extremely important.

☑ There should be enough space for everyone to sit comfortably.

☑ Depending on social conventions, it is probably best to have a mat on the floor rather than a lot of chairs because this makes moving around easier and makes it easier to sit in a circle and to break into small groups. Some chairs should be available for the elderly or disabled.

☑ There needs to be one large wall, large enough to tape at least three flip charts vertically or horizontally.

☑ The venue should be quiet and peaceful and care should be taken that people will not have to sit in the sun.

Equipment for the exercises themselves is very basic:

☑ 2-3 coloured cards per person depending on individual Module guidelines.

☑ 1 thick coloured marker per person, in different colours (three markers are difficult to photograph).

☑ Flat white Flipcharts and some spares (must not be folded otherwise photographic recording of the diagrams is difficult)

☑ Sticky tape and pins.

RECORDING THE OUTCOMES

All the diagrams remain with the groups.

Detailed instructions on recording for each Module are given in Part 2.

Program staff will need for recording:

- ☑ digital camera
- ☑ laptop for direct in putting of notes if possible. Failing this a looseleaf ring binder so that the notes can be arranged and classified in different ways depending on need.
- ☑ ALL DIAGRAMS MUST HAVE A CLEAR KEY and narrative attached to each symbol.

PART TWO:

MODULE GUIDELINES

MODULE 1: ORGANIZATIONAL ROAD JOURNEY

AIMS OF THE MODULE

- *To make sure all members know each other and give each member an individual 'symbol' which she can use in diagrams and pictorial forms.*

- *To understand people's past experiences of groups and PASED and why they have come together.*

- *To discuss individual members hopes and expectations from the group and how these can be brought together into a collective strategy.*

- *To decide organization's future goals and discuss future opportunities/challenges*

- *To start to collect group logos and songs which will develop a LEAP cultural identity.*

These discussions will then be continued as the focus for the rest of the training.

OUTPUTS

- *Flipchart 1: Road journey with beginnings of a plan to focus future discussions*

- *Flipchart 2: Agreed ranking of goals*

- *Symbols for each member and group register*

WHAT ARE ROAD JOURNEYS? SOME EXAMPLES

The training focuses on producing a group 'Road Journey', a tool which has been used by a number of NGOs in India. Road journey diagrams chart a journey from point A to point B, generally over time. They show the starting point, ultimate aims, ups and downs of the journey and opportunities and obstacles along the way.

Some very preliminary examples of Journey Maps drawn in LEAP are:
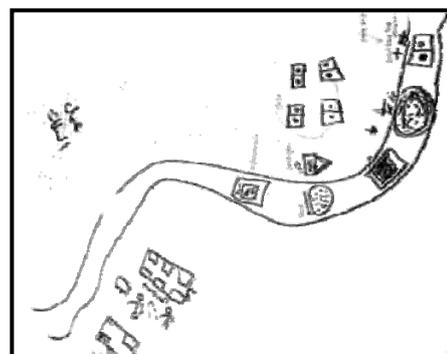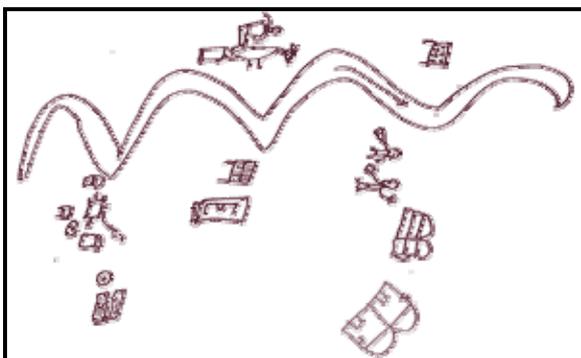
Another more complex Road Journey from KRC in Uganda is: Figure 1: Byenema Wa Bubuku Road Journey showing the sequence of activities which led to the growth of their group. Conclusions and ways forward are also marked.

Road journeys may be of many different types including, but by no means only:

► *Journey to the future*
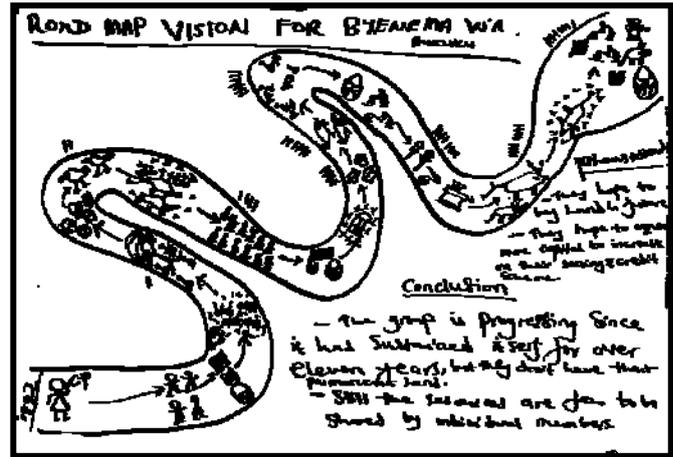
Charts the ultimate goal of a group, identifies the steps along the way and whether or not the journey is expected to be easy and straight upwards, or up and down.

► *Road from the past*

Charts the history of a group from its origin, showing the different achievements and steps or interventions which have helped or hindered them.

► *Empowerment journey*

Charts the ultimate goal of an individual in relation to empowerment showing different stages which that person expects to go through.

Journey diagrams are a useful means of taking clear field notes on a group or individual's history.

HOW TO DO IT: FACILITATION GUIDELINES

For this organizational training the main emphasis is on the journey to the future. Some information is also needed on why these particular women came together to form this group as this may be useful for explaining future opportunities and challenges. If participants have been involved in earlier Women's Centres, then information on what worked and why they stopped is also included.

INTRODUCING THE MODULE

☑ First explain to participants about the aims of the Women's Centres and the groups, and explain LEAP principles of gender equity, inclusion, participation and collective action which underlie the training as given in the introduction to this manual.

☑ Explain briefly the aims of the module and the steps to be followed with rough timing for each. Explain that the group will be drawing a Road Journey of their group goals which will provide the basis for the future Modules. Explain also the use of PALS diagram tools, the use of the drawings and symbols and the participatory process.

☑ Divide participants into pairs, asking them to change seats to sit with someone they do not know so well, or ask them to sit with the person immediately opposite them in the room (on the assumption that they will have sat with those they know best). But make sure that they have a mutual language for good communication.

STEP 1:   *Start the Road Journey:* Pin up a Flipchart in the centre of the wall and starts to draw the Road upwards from the bottom left-hand margin to the right-hand side. Ask participants if they expect the Road to go straight diagonally upwards, go down? Will it have ups and downs?

STEP 2:   *Pairwise Vision drawing:* Give each participant 3 cards and a marker pen and ask them to draw a dream for the future on each card (5-10 minutes). Ask them also to decide on a symbol signature for themselves. Then ask them to explain their symbol to their partner and discuss what each of them have drawn (10 minutes). Explain clearly that each participant will have to explain back to the group which symbol the other person has chosen and which dreams they have drawn.

STEP 3:   *Collective visioning:* Put up another Flipchart at the top right of the central Flipchart (the end of the Road). Then starting with the back of the room, or people who are less confident and articulate, encourage each to come up in turn and explain their partner's symbol and cards and put the on the new Flipchart. Similar visions should be grouped. Once this is done discuss which visions received most 'votes' and whether people also agree with those which to not receive many cards - it may not be because these are unimportant, but simply people did not think of them. Then have a show

of hands to rank the visions on the righthand Flipchart starting at the top.

STEP 4:   *Examining the past:* Put up another Fliphcart at the bottom left hand of the Road Journey. Of the visions identified, which were also tried in the past? What are the likely opportunities and constraints? Depth of discussion here will depend on what the history of this particular group is. Where a Women's Centre existed in the past then how was it started, how many people were involved, what activities were involved, what worked and what did not, what would participants want to repeat? This discussion should only be brief and given as homework to the women involved.

STEP 5:   *Identifying opportunities and constraints to achieving the different visions* Brainstorm with participants about how they might go about achieving one or more of the different visions. Stress that this is only an initial discussion which will be followed up later using the Tree diagrams. Put buildings, bridges or other symbols to mark key steps which could be taken, institutions who could be approached and support which might be needed. Also likely problems or shocks. Throughout the discussion follow the participatory guidelines and make sure that everyone has contributed at the end. Put main constraints on a Flipchart underneath the Road Journey and the opportunities on a Flipchart over the top.

STEP 6:   *Summarise the discussion* and the key issues to be followed up in future Module discussions.

HOMEWORK

☑ Those women who were involved in previous groups and Women's Centres should get together and draw the Road Journey of the past and discuss the implications of lessons for the goals identified for the future. They will bring this along to the next meeting for the group.

☑ Those women not involved in earlier groups should come to the next meeting with a logo and think about songs they would like to sing.

FACILITATOR DOCUMENTATION

The main aim of the facilitator notes is to record the details necessary for the program to design and maintain its monitoring system. From this module the key points to note are:

☑ To draw up a register with the symbols, check through is present and who is not. Also who is a current PASED client and who was previously involved in the Women's Centres.

☑ To list the visions, votes and prioritization as input to the start of LEAP's participant-based indicator list.

☑ Confidential notes on levels of participation and participatory skill. Are there likely to be any particular problems with this group? Any intense conflicts of interest? Any very dominant members? Any members who completely lack confidence and do not participate?

☑ For the 3 groups to meet to redraw the tree neatly for presentation at the next meeting with a proper explanatory key. These tasks must be done collectively – not left to just a few people. If some women find it particularly difficult to meet the others they must come with suggestions for logo or a song.

FACILITATOR DOCUMENTATION

☑ Facilitator documentation from this Module will have to adapt to the particular issue and how this relates to priority issues of LEAP.

☑ It is crucial that a clear key is drawn. Also that clear photographs are taken.

MODULE 2 POVERTY AND SOCIAL INCLUSION DIAMOND

AIMS OF THE MODULE

- *To examine different types and levels of poverty and social exclusion*
- *To get some baseline data on poverty levels of members*
- *To identify current levels of inclusion within the group*
- *To look at reasons for low inclusion of the very poor and other marginalized groups and possible solutions*
- *To establish trackable targets for increasing economic and social inclusion*

OUTPUTS

- *Poverty and social inclusion Diamond* marked with local categories, gender dimensions, numbers of women in each category and numbers of extremely poor women in the community who need to be brought in.
- *Poverty status information as self reported by members* to be keyed into baseline.

WHAT ARE INCLUSION DIAMONDS? SOME EXAMPLES

Diamonds are used to investigate extent and criteria of social differentiation within communities and/or groups. They start by identifying where the majority of a population are as the middle of a diamond. Then the numbers of people or examples at the extremes of the diagram are identified together with the reasons and criteria used.

Note: Poverty diamonds were first introduced to the author (and may have been invented by) Rosette Mutasi of SATNET at the KRC workshop. It was also piloted and further discussed by participants at the workshop. The poverty diamond idea has then been further developed by the author and adapted to other types of issue in the light of discussions and field experience.
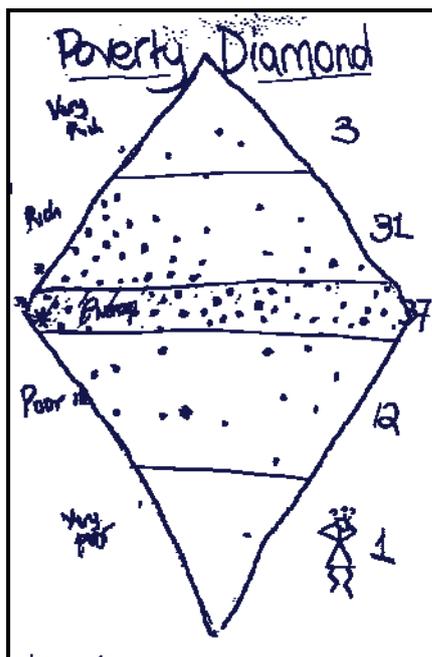
Poverty diagrams drawn during fieldwork at the KRC workshop.
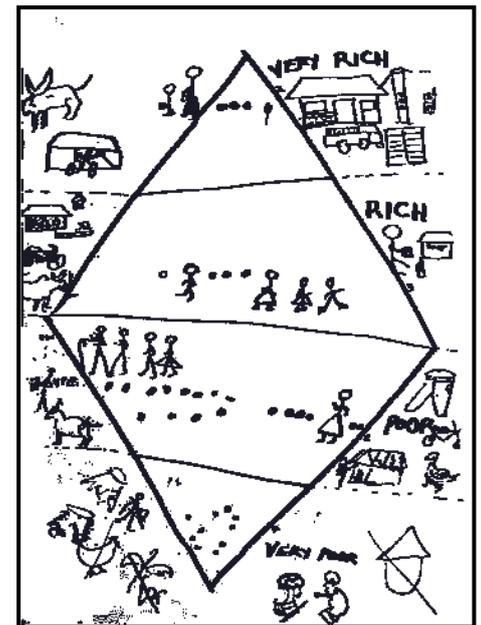
TYPES OF DIAMONDS

Diamonds may be of many different types including, but by no means only:

▶ *Poverty diamond* Looks at whether most people are above or below the poverty line as identified by a community, then how many people are very rich or very poor, what criteria are used and why.

▶ *Empowerment diamond* Looks at whether most people consider themselves, or could be considered, powerful, how many people are very powerful or very powerless, what criteria are used and why.

▶ *Household equality diamond* Looks at concepts of household equality, where the most households are above or below this ideal, the criteria used and the numbers and characteristics of ideal households and very bad households.

▶ *Environmental awareness diamond* Looks at whether most people consider themselves, or could be considered, environmentally aware or using environmentally friendly methods, how many people are seriously harming the environment or protecting it, what local criteria are used and why.

A Participation Diamond for examining and monitoring group level participation is discussed in Module 3.

HOW TO DO IT

☑ Feedback from previous Homework.

☑ Explain to participants the importance of economic and social inclusion for LEAP. Also the need for LEAP to monitor poverty targeting and inclusiveness.

☑ Divide participants into pairs, asking them to change seats to sit with someone they do not know so well, or ask them to sit with the person immediately opposite them in the room on the assumption that they will have sat with those they know best. But make sure that they have a mutual language for good communication.

STEP 1:   *Brainstorming criteria*: Participant should be given four cards, on two they should draw the characteristics of the very rich, on the other two characteristics of very poor. Then they discuss with their partner. Explain clearly that each will report back what the other said.

STEP 2:   *Drawing the diamond* On a large Flipchart draw a diamond shape with a line across the middle to represent the 'majority poverty status' ie the position of most people. Starting with the back of the room, or people who are less confident and articulate, encourage each to come up in turn and put their partner's cards in the appropriate section of the diamond. Similar criteria should be grouped. Once this is done discuss which criteria received most 'votes' and whether people also agree with those which to not receive many cards - it may not be because these are unimportant, but simply people did not think of them. Then have a show of hands to rank the criteria down the right hand side of the chart starting at the top.

STEP 3:   *Social inclusion criteria:* Discuss whether or not there are any particular gender dimensions to poverty which might need to be added to the criteria of the extremely poor e.g. women who are subordinate in polygamous marriages with men who are not so poor, women subject to domestic violence and with no control over decision-making. Are there any other social criteria to assess disadvantage? Eg disability, particular ethnic groups. Add these criteria to the bottom of the diamond.

STEP 4:   *Filling in the levels:* By the end of the discussion there should be a clear ranking of criteria at the top and the bottom of the diamond. Then discuss criteria for people just

above and below the poverty line. The different criteria e.g. income, housing, health, household relations, literacy should be listed in symbols with clear identification of what constitutes 'extremely poor'.

STEP 5:   *Plotting of group members* People should be given one further card on which to put their own personal and confidential ranking of their own poverty status using the criteria on the Diamond. They should draw each of the symbols on the card. They should then mark with the appropriate numbers of smiley or sad faces how they rank themselves according to each criterion and give themselves and overall ranking for poverty. It should be stressed that LEAP is an inclusive programme, bringing together both the extremely poor and the better off to work together for empowerment and poverty eradication. There is therefore nothing to fear from telling the truth. On each card people should put their own personal symbol so that this can be recorded on the LEAP records. They should hand these to the LEAP staff who will then mark the numbers of people in each smiley/sad face category by each criterion on the Diamond.

STEP 6:   *Community Economic and social inclusion assessment*: How many women in the community could be classified as extremely poor but are not in the group? (The boundaries of the community referred to must first be established, if this proves difficult then it may be necessary to do a community map).

STEP 7:   *How can inclusion be increased?* How can those at the bottom of the diamond be brought into the group? Or included in another group?

STEP 8:   *Setting targets* what timescale can be set for their inclusion and who will take responsibility?

HOMEWORK

☑ To visit those women who have been identified as extremely poor to see whether they would like to become members of the group, or make their own group.

FACILITATOR DOCUMENTATION

The main point of the facilitator documentation from this Module is to provide information to assess the effectiveness of poverty targeting,

the characteristics and rough numbers of those very poor people who are currently being left out, ideas for modifications in program designed which might increase their inclusion and targets for this particular group which could be monitored as a later date. The information from this exercise are on the basis of self-assessment and therefore should not be claimed to be 'scientific'. More detailed verification will need to be made at a later date through much more detailed Financial Analysis training and/or assessment in the loan application process. It should however provide the basis for understanding local categories and identifying effectiveness of coverage of the extremely poor and socially marginalised and increase their inclusion - the main short-term aims of the exercise.

The key points to note therefore are:

☑ Criteria for identifying the extremely poor and disadvantaged in a form suitable for comparison with criteria identified by other groups e.g. grouping economic criteria.

☑ Numbers and percentage of group members identified in each category.

☑ Numbers of the very poor in the community who are not in the group.

☑ Suggestions for their inclusion which might be relevant for other groups.

☑ The targets set for this particular group to enable monitoring at a future date.

MODULE 3: GROUP PARTICIPATION DIAMOND

AIMS OF THE MODULE

- *To examine group structure, leadership and norms*
- *To discuss different types and levels of participation*
- *To identify how many people are participating at the different levels and reasons for low participation and differences between members*
- *To establish targets for increasing participation and equity in the group*

OUTPUTS

- *Group norms for responsibilities of leaders and members*
- *Targets for increasing participation*

WHAT ARE PARTICIPATION DIAMONDS?

Participation diamonds are a new tool which have been used before. However they would follow the same basic steps as the Poverty Diamond to promote discussion of different types of participation and identify who is participating.

During the initial stages of LEAP (ie the first year or so of any group) it is suggested that the groups should be quite informal with the main emphasis on increasing equitable participation and avoiding setting up of formal leadership structures. Otherwise, given the mixed membership of the groups, it may be very difficult at a later stage to prevent the groups being dominated by better-off women without causing considerable offence and disruption. Following the piloting of this Module, LEAP would be in a position to drawn up some draft Guidelines for developing a group constitution which can then be formalised later once participation and skills have been fully developed.

The facilitator Notes should focus on information needed to feed into this process.

HOW TO DO IT

☑ Feedback from previous Homework.

☑ For this particular exercise, if leaders have already been chosen, they should sit together. The other participants should then change seats to sit with someone they do not know so well - if such people still exist in the group after the first two modules - or ask them to sit with the person immediately opposite them. But make sure that they have a mutual language for good communication.

☑ Explain to participants the importance of participation for group effectiveness, and some of the tensions between leadership and group participation: leaders particular roles and skills but must not dominate. Members must contribute and participate. Otherwise leaders will become tired and burned-out and members will become disillusioned. It is important therefore that groups should be aware of problems of participation, identified the types of participation it to the members want and establish appropriate guidelines for both leaders and members.

STEP 1: *Establishing criteria:* in pairs participant should be given six cards. On the first two they should mark the criteria which they think characterise ideal leaders. On the second two criteria which they think characterise ideal members. On the third two cards they should mark the criteria of members who do not participate or bad members.

STEP 2: *Draw the diamond*: with a line across the middle as before. This time the top of the diamond characterises special qualities of ideal leaders which ordinary members do not have, going down in gradations of more common qualities to the middle of the diamond representing ordinary members. The bottom of the diamond then represents those members who do not participate.

STEP 3: Implications of ideal leadership qualities for the type of *leadership structure* the group wants e.g. should leadership be rotated, how often, what sort of training might be needed?

STEP 4: Implications of ideal membership qualities for the type of *membership requirements* and responsibilities the group might have.

STEP 5: *Ranking of members* according to these qualities and skills.

STEP 6: *Examining lack of participation*: if some members are identified as not participating then the reasons for this should be discussed and possible solutions proposed (eg reinforcement of the participatory process guidelines in Part 1).

STEP 7: Examining ways of *broadening leadership*: How can more of the ordinary members be facilitated to take on leadership responsibilities and capacities.

STEP 8: Targets for *increasing participation* of everyone ie how to move the dots at the bottom upwards and also the members into leadership capacities.

HOMEWORK

☑ Each member to draw up their own targets for responsibilities and their own agreement with the group.

☑ The group to meet to discuss these before the next training.

FACILITATOR DOCUMENTATION

The main point of the facilitator documentation from this Module is to provide information to feed into development of Guidelines for group constitutions.

The key points to note are:

☑ Different criteria identified in a form suitable for comparison with criteria identified by other groups.

☑ Numbers and percentage of group members identified in each category (referring back to earlier confidential notes on participation from Module 1).

☑ Types of solutions proposed for increasing participation which are of broader relevance for other groups.

☑ The targets set for this particular group to enable monitoring at a future date.

MODULE 4: PROBLEM/SOLUTION TREES

▶ *To investigate in much more detail the reasons for problems and potential solutions*

This module will use and adapt different types of tree to the issues identified.

OUTPUTS

▶ *Problem and solution trees for the 3 priority issues including gender and poverty considerations.*

WHAT ARE THEY? SOME EXAMPLES

Trees start from a trunk representing an issue or an institution like a household or community. Problems are then shown as roots (and roots of roots) and solutions as branches (and sub-branches).

Some preliminary examples of Trees drawn at the KRC Workshop or used in KRC's Civil Peace programme:
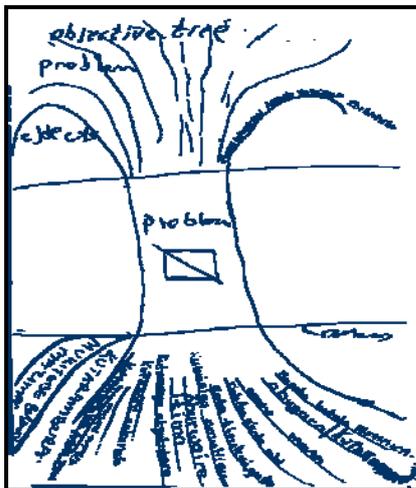

Figure 1: Cause and effect tree showing reason for lack of funds in a group.

TYPES OF TREES

Trees may be of many different types including, but by no means only:

▶ *Problem and solution tree:* Like problem and effects trees this has a particular problem as the trunk. The causes of the problem

are then shown as roots of the tree. The branches in this case are the solutions to the problem.

► *Empowerment or vision tree*: has a particular goal or vision like empowerment or poverty elimination as the trunk. The roots of the tree show the different contributing elements or changes needed. The branches then show the different elements or effects of the vision or the ways in which the changes can be brought about. This could be used as a further elaboration of the Road journey.

► *Problem and effects tree:* Has a particular problem as the trunk. The causes of the problem are then shown as roots of the tree. The effects of the problem are shown as branches. This could be used to examine the importance of particular issues raised and in order to highlight the types of argument which might be used to convince other people eg of the necessity for women to have a greater say in decision-making examing the reasons why women do not have a say, and the effects on the family. A further variation might be a composite Effects – problems – solutions two tier tree drawing problems first, going down to effects as a lower tree roots of roots. Then the solutions as a branches of branches tree on top.

► *Costs and benefit tree* (also input and output tree): Has an activity as the trunk. The roots of the tree represent the costs or inputs and the branches represent the benefits or outputs. This could be used to evaluate particular activities proposed.

► *Income and expenditure tree*: Has a group, household or individual as the trunk. The roots of the tree represent the income from different activities or people and the branches represent the expenditure on different activities or people. This could be used to evaluate any joint collective economic activities proposed.

HOW TO DO IT

☑ Feedback from previous Homework.

☑ Put up the Road journey from Module 1 and ask one of the less articulate participants to summarise the main priority points.

☑ Explain to participants the next stage of going into more detail into 'challenges' and looking for solutions.

☑ Participants should divide into 3 groups depending on the issue they would like to look at.

☑ The steps should be briefly explained. Then the facilitators should go round the 3 groups to help them.

STEP 1: *What is the problem?* Draw the trunk and mark the central problem on it.

STEP 2: *What are the roots?* And roots of roots? Start to draw roots for each of the causes or inputs to the trunk. Mark these with symbols and/or words. Then decide their relative importance. Some may become large or tap roots. Others may become rootlets or roots of roots.

STEP 3: *Refining the roots:* Which roots are most important? Do they apply to everyone (put on numbers where relevant)? Which might relate to women and gender? To poverty? To contextual challenges which will need to be addressed?

STEP 4: *What are the branches?* And branches of branches or leaves? Start to draw branches for each of the solutions. Mark these with symbols and/or words. Again decide their relative importance. Some may become large or main branches. Others may become smaller branches or twigs/leaves off main branches.

STEP 5: *What are the key conclusions?* Do all roots have branches? Are some problems without solution? Revise their size and/or colour accordingly to clearly show biggest problems/ main solutions.

STEP 6: *What are the practical implications* for ways forward? Which solutions should be prioritised? Which require changes in individual behaviour? Which require changes in household/community behaviour? Which require approaching other institutions or collective action? Who will take care of which branch/es as their role in the solution?

HOMEWORK

☑   To do own individual Road Journey in relation to their chosen issues.

MODULE 5: INSTITUTIONAL CIRCLE DIAGRAMS

AIMS

▶ *To identify the different types of institutions in a community*

▶ *To identify which ones are already represented within the group to given them confidence and the vision to look outside the group*

▶ *To identify those key institutions which could be influenced and approached for advocacy and lobbying and how this might be done*

▶ *To decide trackable targets to widen networks and influence of the group.*

OUTPUTS

▶ *Institutional mapping for the different priority activities.*

▶ *Plan of action for widening networks and approaching institutions.*

WHAT ARE THEY?

Circle diagrams (also known as Venn or chapatti diagrams) show the relationships between different elements or institutions represented as overlapping circles of different sizes.

Example of a Circle Diagram of a grassroots women's organization Devgadh Mahila Sangathan supported by ANANDI in India. This shows DMS in the middle and its relationship with other institutions in the area, tracking their increasing influence.
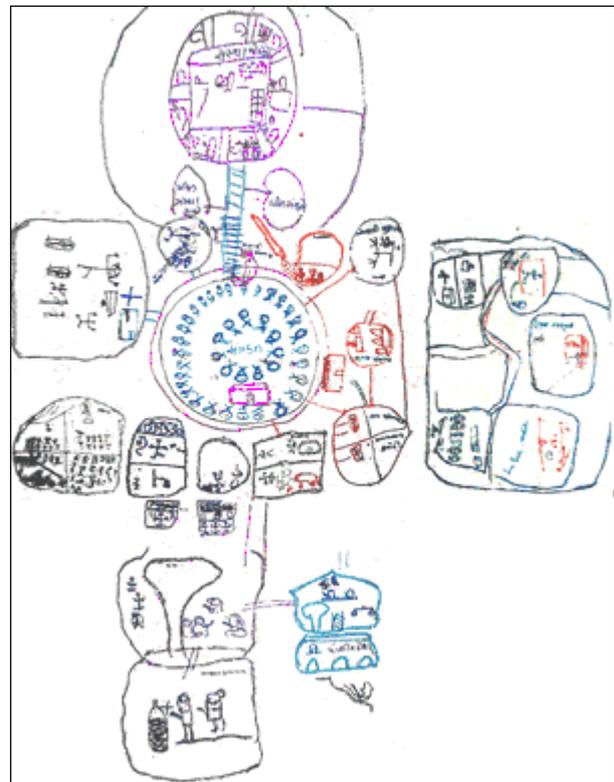
TYPES OF CIRCLE DIAGRAM

Circle diagrams may be of many different types including, but by no means only:

► *Institutional analysis:* Map the different institutions and/or social groups in a village eg community groups, religious groups and institutions, ethnic and other social groups and shows their relative importance, size of membership and degree of overlap.

► *Decision-making analysis:* Shows the different members of a household or group and the decisions made separately by each. Decisions made jointly are marked on overlaps.

HOW TO DO IT

☑　　Feedback from Homework leading into discussion of institutional challenges.

☑　　Explain to participants the importance of widening the networks and influence of the group as wide as possible if they really want to change things affecting their lives.

☑　　Explain the importance of pooling and sharing contacts and information.

☑　　The LEAP project cannot do everything for them with the limited staff and funds. So is is important to develop a proper action plan for the group.

STEP 1: *Pairwise brainstorming:* In pairs women should list as many institutions as they can think of in the community or which affect their lives. Give examples eg Government institutions, ROSCAs, Market associations? Religious organizations? Other NGOs? The pair who come up with the most at the end of 10 minutes should be given a clap or some sort of prize.

STEP 2: *Mapping the main institutions or actors.* Draw circles for each of the institutions.

STEP 3: What are the *relationships between* these institutions? Do any of the overlap? Which are the largest? The most powerful? Those which are open? Those which are closed? Men-only? Women-only etc. Mark these with different sizes, colours, types of line etc.

STEP 4: In which of these organizations are *women* represented where they could widen the networks and influence of the group? Mark the numbers of women in each.

STEP 5: In which of these organizations do women *know people* to help them widen the networks and influence of the group? Mark the people in each.

STEP 6: Which are the key *powerful institutions* where they are completely excluded but which affect their lives? Eg religious hierarchy? Local government? Are there any ways they think these institutions could be approached? Draw symbols to represent the actions which could be taken.

STEP 7: What are the conclusions for an *action plan*? Summarise with some key action steps to broaden the networks and influence of the group.

HOMEWORK

☑ To begin contacting networks and organizations identified.

FACILITATOR DOCUMENTATION

The main point of the facilitator documentation from this Module is to obtain an overview map of the institutional context within which LEAP operates, the types of institutions in which women are members, whether any members have powerful contacts within the administration etc.

The key points to note are:

☑ The different types of institutions in which women are involved and how many of the women.

☑ Names of women with good contacts in powerful institutions.

☑ Women's priorities for extending spheres of influence and the targets they set to track effectiveness over time.

MODULE 6: STRATEGIC ROAD JOURNEY

▶ *To summarise conclusions of previous sessions*

▶ *To revisit first road journey and agree priority goals*

▶ *To identify realizable staged targets for the future*

▶ *To provide a basis for tracking progress over time*

▶ *To vote on logo and favourite songs*

OUTPUTS

▶ *Strategic plan*

▶ *Logo and song*

HOW TO DO IT

By now all the women should be familiar with the different tools and also used to presenting and discussing in a participatory manner. In this final session therefore the facilitators should very much play a back seat role and listen to what the women have to say and watch the participatory process.

STEP 1: One woman who has not yet spoken very much in the group should be asked to act as chair for the meeting. Another woman who has not yet been very vocal should be asked to be in charge of documentation in drawing form.

STEP 2: In pairwise groups randomly allocated, the women should discuss the key things they have learned from the training, the three things they enjoyed most and three remaining questions they have. Everyone must identify these remaining questions and issues. They then report back on what their partners have said by drawing the remaining questions/issues on a Flipchart. The chair and recorder should give their views last.

STEP 3: The women should then divide into the three groups corresponding to the three key issues identified for action. They should draw Road Journeys identifying concrete targets and actions which will be taken.

STEP 4: The LEAP facilitators should go round and make sure gender issues and inclusion issues are discussed and targets set, and that networks and institutions to influence are also identified.

STEP 5: The Road Journey from the first meeting should be put up on the wall. A second Flip Chart should be put next to it with three roads and divided into four columns. The three Road journey should then be copied onto this master plan and discussed in plenary.

STEP 6: The session should be chaired and recorded by the same women as in Step 1. A microphone must be passed around and the guidelines participation followed.

STEP 7: Again the LEAP facilitators should go round and make sure gender issues and inclusion issues are discussed and targets set, and that networks and institutions to influence are also identified.

STEP 8: Evaluation forms for each Training Module using smiley/sad face symbols should be passed around and filled in confidentially.

STEP 9: The women should then vote on the logo and song and finish with the song they choose.

STEP 10: Any certificates should be distributed as the women sing the song.

PART 3

PROGRAM LEVEL

REPORTING

The training process will also provide information for monitoring the LEAP program. However only information which will be used should be recorded, and the use should be clear before spending time recording. Also the confidentiality of information must be respected, as must the right of women to withhold information they do not want to give. It is however hoped that women will willingly give the information which is useful for improving the program, including demonstrating its effectiveness to funders to secure further funds in future.

The information database will be progressively built-up as follows:

STEP 1: All participants in the training must be registered as members of the groups, with **names and address** using their chosen **symbol** at the first meeting. This information should be entered into a database compatible with the existing Information System. This will enable tracking of numbers of women and attendance at the training and give an indication of satisfaction with the training and a benchmark against which to judge the evaluation of the training. at this meeting the following information should also be noted for each member: whether or not they are PASED client, whether or not they were previous in the involved in the Women's Centres. Those members who are obviously likely to be dominant and those who are

less articulate should also be marked to assess progress over the period of the training.

STEP 2: In module 2 self reporting of ***poverty and vulnerability*** status is obtained by member and should also be entered into the database. This should include information on income, literacy, health/disability and gender-related vulnerability and ethnic group.

STEP 3: The ***criteria and targets identified*** for poverty targeting, increasing participation and developing networks and institutions should also be marked on a database for the group, together with digital photographs of the diagrams.

STEP 4: At the ***end of the first year***, the poverty statistics and achievement of targets will be assessed at one of the follow-up group meetings. This will feed into the discussion at the Annual fair.

INDIVIDUAL INFORMATION FOR DATABASE

Name
Address

Social inclusion monitoring:

Age:
Marital status: never married, widowed, divorced/separated, married
Health/disability status:
Literacy level:
Ethnic/place of origin:

Economic inclusion monitoring[2]:

Broad assessment of income to which the woman has access and whether or not this would place her in the extremely poor, poor or better-off categories as locally defined. This would be based on self-assessment, and later cross checked through the loan application process and/or the planned financial management training.

Housing: as main assessment of assets.

GENERAL FACILITATOR CONCLUSION about poverty status .

Experience and previous involvement with PASED?

Loan client?

Involved with earlier Women's Centres?

GROUP INFORMATION FOR DATABASE

Name, location

Number of members

Poverty status of members (numbers and %) according to:

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[2] These will inevitably be only rough estimations to be checked through use of inclusion diamond and income/expenditure trees later on. Collecting some data at this stage will enable an assessment of how accurate the different methods of collecting this information are likely to be and the particular activities or backgrounds for which information is likely to be problematic.

Income criteria (income/housing combined)

Social criteria (separately enumerated for age, literacy, health/disability and gender vulnerability)

Criteria and targets for reaching extremely poor.

Membership and leadership agreements and targets for increasing participation.

Action Targets from Road Journey for the 3 activities including action targets for gender, inclusion, networking and approaching other institutions for each activitiy/issue.

Digital photographs of all diagrams for the group, with key and qualitative notes. These last can also be photographed from handwritten to save time.