Has Popular Education Methodology Contributed to Women's Empowerment in Rural Zambia?

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1. Introduction: Why we conducted this Research

This action research study was guided by one central question, namely, whether and to what extent popular (or participatory) education methodology (PEM) as employed in the work of Women for Change (Zambia) has contributed to women's empowerment- social, economic and political- and therefore built women's leadership in rural Zambia.

In responding to this central research question, three cautions are necessary. First, when dealing with social outcomes it is always tricky to infer causality. The debate on models for attributing social change rages on in the social sciences (Hedström & Ylikoski 2010; Gross 2009). Therefore our response to the central research question for this study is not about proof of causality, but rather, about establishing correlation between WfC's popular education methodology and outcomes that embody empowerment for leadership. The second caution is that we are conscious of the fact that social change is a dynamic rather than linear process, so what we present here as the experiences of WfC members are milestones along personal or collective journeys rather than an 'end point'. Social realities are changing even as we describe them. The third caution is summed up in the question 'what measurement counts?' It is easy to resort to quantifying empowerment for leadership by counting off the number of women who have contested for civic leadership, served on traditional leadership structures, or chaired their District Chamber of Commerce, but what measurement will tell us whether social acceptance of women's political and economic leadership has been deepened? This study tries to capture this more robust measurement.

The study has been conducted under the auspices of a five-year project in partnership with the Coady International Institute, on Women's Leadership for Economic Empowerment and Food Security – the EMPOWER Project. As part of this four-country project, WfC's contribution is to share its experience on how PEM may be employed to empower women for leadership in social, economic and political spheres.

This study is organised into five main sections. Following this introduction, the next section outlines the methodology that was employed. Section 3 discusses the findings. In summary, we found that there is anecdotal evidence from WfC's work at the community level that correlates PEM with empowering transformation at five levels: personal attitudes and behaviour, gender relations within family, participation and leadership within WfC groups and Area Associations, community leadership, and interaction between state and citizens at the macro-political level. Some of this evidence could be strengthened by triangulating data, and we point out the areas that could benefit

from such triangulation. Section 4 provides a detailed reflection on PEM's contribution specifically to economic empowerment. Section 5 focuses on the implications of the findings of this study on three aspects of WfC's work: learning from the field, critical reflection on PEM tools, and adapting WfC's monitoring and evaluation systems to capture outcomes and gradual transformation, in a funding environment that is driven by time-bound project outputs. The final section is a brief conclusion.

2. Methodology: How we conducted this Research

The central question for the research was whether and to what extent popular education methodology (PEM), as employed in the work of Women for Change (Zambia), has contributed to women's empowerment in the social, economic and political spheres, and therefore built women's leadership.

We pursued the inquiry under three specific questions derived from the central research question:

1. How is women's empowerment understood in WfC's work, both by staff and by the rural communities among whom WfC works?
2. How is PEM understood, applied and justified in WfC's work, both at the level of staff and at the level of community group leaders?

     2(a) Is there evidence of critical reflection on PEM (rather than simply routine application) at the level of community mobilization by group leaders?

3. In what terms do WfC staff and community group leaders articulate connections between the most significant changes in their lives and WfC's PEM approach?

     3 (a) Does the articulation point to belief in a correlation between PEM and women's empowerment?

The study relied on both empirical data and a review of WfC literature. The empirical component consisted in:

1. Focus group discussions with leaders of community groups in WfC's operational areas, selected for balance between areas in which WfC has worked for a long time, and new areas.
2. Non-participant observation (by a consultant) of selected WfC activities at community level.
3. In-depth interviews with selected WfC staff in Lusaka.
4. Focus group discussion with selected staff of WfC in Lusaka, selected for balance between long-serving and newer staff, and for variation in depth of experience in PEM.

Three sites were chosen for the empirical component of the study:

- An area of Mumbwa district with established WfC Area Associations (a 'federation' of 10-12 community groups), ranging in age between 9 and 21 years.
- An area of Mumbwa district with very new WfC groups, only set up in 2014, some only in the process of formation. (See Annex 1 for chart summing up information on Area Associations in Mumbwa district and their dates of formation).

- An area of Chongwe district with very new WfC groups, only set up in 2014, also with some in the process of formation.

The focus group discussions employed the Most Significant Change narrative approach, among other participatory tools. The checklists used in facilitating the focus group discussions are attached in Annexes 2 and 3.

With the Chongwe groups we also piloted the idea of involving community group leaders in journaling so that there would be a record of their experiences over time, which would serve both this Action Research as well as the long-term goal of on-going reflection within WfC. We went through the process of explaining and illustrating what journaling is; that it is no different from the stories of 'most significant change' that they had just shared, except that this was on a regular periodic basis. What we got after four weeks were very sketchy pages. The experience has taught us that journaling does not work very well in a context where writing is not part of daily life for most people, and stories of change are more productively captured through visualisation and dramatization. Reflection is also more a collective than solitary exercise. Narratives are shared through a collective process, where there is mutual affirmation and enriching of the narrative as it unfolds.

Conscious of the narrow geographical coverage of the empirical component of the action research, great effort was made to supplement this with a comprehensive review of WfC documents: annual reports, WfC's quarterly newsletter – *Women in Touch*-, previous research and evaluation reports. Of greatest use were the newsletter, and reports of two previous evaluations, one in 2000 (River of Life) and another in 2007. Also useful was a report on a 2012 reflection exercise that preceded WfC's strategic planning for the subsequent five years. These are cited frequently in discussing our research findings in the sections that follow.

A representative group of the participants, along with representatives from the gender and development sector, were invited to a feedback forum in Lusaka in April 2015 to discuss the study findings. Their input has also been incorporated into this report.

3. Research Findings

3.1 Background on Popular Education Methodology and Empowerment

Popular education (or participatory education) (PEM) is an approach to teaching and learning whose purpose is to get people in a community to become conscious of and critically reflect on how their society is structured; its political, economic, social and cultural systems. It approaches learning as reading the 'world', as opposed to simply reading the 'word'.[1] The link to empowerment is that it is intended to help people become 'more active agents in the struggle to achieve a more equal and just society.' (WfC PEM Module, n.d.).

PEM methodology is inspired by the work of Paolo Freire, a Brazilian thinker on the philosophy of education. Freire believed that every human being, no matter how 'submerged' in the 'culture of silence' or resignation to poverty and injustice is capable, with the right tools for a dialogic encounter with others, of looking critically at his/her world. Through such encounter, the person can 'gradually perceive personal and social reality as well as the contradictions in it, become conscious of his or her own perception of that reality, and deal critically with it.'(Freire 1970:32).

For WfC, the entry point is usually historical analysis: collectively analysing the past, questioning to draw out its connection to the present, in order to foster shared understanding of where we are now, how we came to be here (why) and what we need to do about it in the present and future; essentially fostering a shared vision for change (River of Life 2000:10, 11).

Then follows a learning and reflection cycle: Through a series of participatory activities each person is encouraged to take part, share their knowledge and experience, build their confidence, and ultimately build consensus toward collective action. The activities employ tools such as the Development Tree, River Code, and Critical Analysis Loop (WfC PEM Module, n.d.), all drawn from the Freirian inspired *Training for Transformation* manual on popular education. Learning is conducted through accessible media such as songs, role plays/sketches, mapping or story-telling. This is a cycle rather than a one-time event therefore there is an iterative relationship between action and reflection throughout community members' interaction with each other as they take on issue after issue in the life of their community over time. WfC mediates and facilitates this interaction but in principle WfC's role should diminish over time and eventually phase out altogether as the

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[1] The phrase 'reading the world' is attributed to Myles Horton, the founder of the Highlander Research and Education Centre in Tennessee, USA. For information on the centre and its contribution to social justice struggles in the Southern US see http://highlandercenter.org/media/timeline/.

community members form groups, then federate into Area Associations and subsequently District Development Associations. Through these community-based structures the members become adept at facilitating critical analysis, collective action and reflection within their own communities, and eventually become trainers for neighbouring areas.

The emphasis on group formation and strengthening of community-based structures for collective action is seen as being at the very heart of the process of empowerment. WfC's training manual on Critical Analysis and Sustainable Human Development defines empowerment as:
 'The freedom to discuss, share and ultimately gain control over one's life. Empowerment begins with participation. Through participation people gain confidence as well as a mature understanding of the issues and the commitment necessary to choose to do something as a group to improve their situation and the conditions around them.' (WfC 1998:D25)

The 'end result' that WfC intends through its work is expressed as 'women becoming actors and masters of their own destiny' (WfC 1998:A9) so that women and men can 'work together as equal partners in development'[2]. The idea of people becoming masters of their own destiny is a Freirian-inspired view of empowerment. The 'moment' of empowerment, so to speak, is when people come to the realisation that the world to which they relate 'is not a static and closed order, a given reality which [they] must accept and to which [they] must adjust'. An attitude of resignation is not altogether uncommon for marginalised rural communities that have come to accept that their poverty must somehow be God-ordained.[3] People are empowered when they realise that the human being 'is a Subject who acts upon and transforms his [her] world, and in so doing moves toward ever new possibilities of fuller and richer life individually and collectively' (Freire 1970: 32).

In popular education terms, therefore, empowerment is fundamentally about transformation in one's mind set. So when we set out to respond to a research question that demands to know whether popular education methodology as employed by WfC has empowered women for leadership we are really looking for evidence of transformed mind-sets. How do we find evidence of transformed mind-sets? Where does one look?

A transformed mind set manifests itself through transformed power relations. Transformation entails challenging and changing power relations, as a result of having understood that one does not have to

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[2] This is expressed in WfC's Mission Statement.
[3] See, for example, a story about a community in Nkenga, Western Province: 'Poverty is not a norm' *Women in Touch* 2007:7.

take an unjust situation as a given; that it is possible to change it. This entails discarding attitudes that impede self-realisation- and therefore leadership capacity- and embracing attitudes that foster and nurture one's leadership capacity. Transformation manifests itself at various levels, akin to ever-widening ripples, and our research findings are organised according to these levels:

- Transformed personal attitudes and behaviour;
- Transformed family relations;
- Transformation reflected through participation and leadership in WfC groups and Area Associations;
- Transformation reflected through leadership of community collective action;
- Transformation reflected in relations with macro-level structures of governance.

3.2 Empowerment as transformation in personal attitudes and behaviour

'*We had myths and beliefs that women could not speak in front of men and that women should not eat certain parts of a chicken or eat groundnuts. We no longer practice these now due to sensitisation.*' (WfC, *Women in Touch* 2007:1, attributed to Angela Ndhlovu, Mumbwa District Development Association).[4]

Evidence of transformation in personal attitudes and behaviour was gleaned from the 'Most Significant Change' stories of the participants in the FGDs as well as what they had to share concerning their views on what empowerment means to them. We have also drawn from accounts previously documented in *Women in Touch.*

The FGDs yielded a lot of rich insights into transformed personal attitudes and behaviour. The box below highlights the insights that emerged from the FGDs with new groups in Mumbwa.

Box 1: FGD with new groups in Mumbwa: insights on transformation in personal attitudes and behaviour

> *"I used to be hard-hearted, like firewood. I was nicknamed 'donkey' and 'mountain' because I was unmoved; I did not associate with people. The village headman took it upon himself to inform me of community meetings. He informed me about a WfC meeting. I only went the second time he invited me. Then I realised that what I had learnt in school was being fertilized and brought to life. He noticed how I had begun to change, so he nominated me to attend a workshop. Now I can say that I have changed from 'donkey' to 'dove'.* [Young male participant; See Annex 4 for his story sketch]

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[4] In this report quotes are attributed to specific persons only if obtained from an already published source. Quotes from FGD participants and interviewees are not attributed, except to indicate the gender of the speaker and his or her district, as per the confidentiality agreement with the participants.

"I was an unapproachable man. I resolved that the woman I would marry must have at least a grade 5 education. I looked down on uneducated women. The training on gender changed my way of thinking. I learnt that it is not only formal education that matters. A woman can have little formal education and still be 'learned' and continue to learn. Now I am married. Before the training on gender I did not help my wife with the house chores even when she was ill.... We are still learning together and moving together in unity." (Male participant)

"I used to simply cry over my problems; like when my husband would refuse to give me money for fertiliser...There was always conflict in my house. Now I am in a cooperative; I can access fertiliser- and I am no longer helpless and shy." (Female participant)

"My thinking was that my wife should 'give me' only sons. I saw daughters as building someone else's home- since they would marry and leave. I have since learnt that a child is a child. I have daughters and they are now in school." (Male participant)

"I am a divorced single mother of 6. Before, I had resigned myself to waiting for my mother to feed us all. But after I mingled with friends who had joined a WfC group I got a garden. I plant and sell okra. Now I give my mother money. You will find me busy working, not idling my life away." [Female participant; See Annex 5 for her story sketch]

"I used to sell livestock to take the boys to school while the girls sat at home...The teaching against son preference is what really changed me...We used to send the children away whenever my husband and I needed to discuss anything. Now we include all the children in the discussion." (Female participant)

"I was in darkness but my mind has now been opened up, even though I am only a youth. For example, I now know how to plan and organise my life. I used to think that a plan was only about building a house!" (Young male participant)

Among the women there was a shared story of overcoming fear or shyness. One woman depicted herself as a tortoise, whose head had initially been tucked firmly inside its shell, subsequently daring to emerge (see Annex 6 for her story sketch).

"I learnt my rights so now I can do things without fear. I had a dispute with the police and I stood my ground and won."

There was also among the widows, reflection on the moment when interaction with others in WfC groups made them realise that they did not have to feel helpless- that in fact they were not helpless:

Box 2: FGD with older groups in Mumbwa district: Widows overcoming helplessness and fear

"After my husband died his relatives wanted to come and grab my property. [WfC] had trained us on this issue. I got the books out and showed them that the law says it is wrong. I was able to convince them. Because of that training I did not need to feel helpless and be resigned to the situation. I defended my rights and my children's rights.'

> *'I was living in fear but now all fear is gone. I am a widow but I am food secure because I learnt how to plan. I am called upon to advice in managing the community school.'*

The discussion with older groups in Mumbwa district on what empowerment means to them also yielded insights on personal transformation.

Box 3: FGD with older groups in Mumbwa district: insights on transformation in personal attitudes and behaviour

> Empowerment is...
> - *When you have been helped to become aware of where you are and where you could go;*
> - *Having freedom to express yourself, to stand before people, to go to the right offices without fear and ask for assistance that you know you are entitled to;*
> - *When we come to know that even knowledge is empowerment; we used to think it meant being rich;*
> - *When we know our rights as women and no one can suppress us;*
> - *An increase in knowledge, which then has the result of improving your life chances (citing example of knowledge on HIV).*

A transformed mind set helps one to realise that they are not enslaved to their circumstances. A 2009 issue of *Women in Touch* carried a story about a divorced woman in her 50s from an Area Association in Mazabuka district (Southern Province). As a result of the divorce she had lost access to her marital family's fields, and her brothers also denied her access to her birth family's fields. She had managed to negotiate for a rented piece of land with the support of neighbours and Area Association colleagues from which she harvested more than she could consume year after year. She took it upon herself to distribute this surplus to widows, elderly neighbours and orphans: *'I decided I would dedicate my whole life to help people in similar situations like I was.'* (Issue 1, 2009 newsletter: 6).

She did not regard herself as helpless even though her circumstances potentially provided her with justification for just such an attitude. Rather, her view of herself as already empowered translated her circumstances into an opportunity to discover her capacity to empathise with others and facilitate their empowerment.

Even among WfC staff, transformation in personal attitudes and behaviour was prominent as the most significant change:

My starting attitude was 'I will teach these people'. My background as a secondary school teacher influenced this attitude. Then I realised that no one is 'empty'; the best I could do was facilitate. The first time a person in a rural community raised up their hand and said 'I think' it took me aback (WfC staff interview, December 10th 2014).

In summary, the findings of our action research, albeit narrow in geographical scope, do signal evidence of empowerment at this foundational level of one's personal attitude and behaviour.

3.3 Transformation in family relations

Achieving the vision of 'men and women working together as equal partners in development' requires transformation in gender relations at the level of the family. Transformation at the level of family relations is crucial because the family is 'the first sphere of socialisation for children, where human beings first become aware of the differentiated social expectations that are connected to being male or female' (Musembi *et al* 2010:28). Not surprisingly, WfC places a lot of emphasis on transformed gender relations at the level of family as one of the outcomes of its work, and so this level of transformation featured prominently in reflection by WfC members both in this research process, and also in earlier documentation.

Box 4: FGD with new groups in Mumbwa district: transformation in family relations

> *"Before I got married I used to do house chores, but my thinking was that after I marry I should not do house chores, so I stopped. The teaching through WfC has made me change that view, so I am doing chores again."* (Young male participant)
>
> *"Previously my view was that my husband was the leader and owner of everything. It was OK if he just gave me a small plot to grown groundnuts. I have since learnt that I can work together with him and can also take initiative in some things. I can sell second-hand clothes to bring more money into the family and give my ideas."* (Young female participant)
>
> *"Before the training and before joining the group, I was rude to my wife and I used to beat her. I did not see her as having any opinion. Now I treat her with love and I let her share her ideas."* (Male participant; See Annex 7 for his story sketch).
>
> *"I had a bad attitude toward my wife and the whole idea of groups. I was rude in the family; I did not listen to anyone, not even to my brothers. Now I understand leadership differently. I work well with my wife and family. I don't suppress them, so we all benefit more."* (Male participant)
>
> *"Before, I did no house chores. I considered that to be women's work. I did not involve my wife in budgeting. After the gender training I learnt that a man can do these things, and a wife can give ideas. Now neighbours think charms are at work."* (Male participant)

> *"My daughters used to help me with the work in the home. After they got married I had no help; my husband would not let our sons do work in the home. After we both had the training, now we all work. The biggest change is that I am now able to get rest."* (Female participant)

These stories of transformation in family relations are significant in themselves, but more so when we take context into account. A 2014 baseline study of the new area of Mumbwa district conducted by WfC found that 28.6% of survey respondents thought that there are circumstances in which wife beating is justified. In the same survey, 32.2% of respondents were of the view that a woman ought to put up with violence for the sake of preserving a marriage. The same survey revealed that while there was recognition of women's right to use productive resources (land, plough, oxen, seeds and herbicides), support for a wife's control over those resources (expressed in terms of freedom to sell in an emergency, and being able to buy without needing her husband's permission) was only just over 30% on average (WfC 2014).

The change in attitude reflected in these stories of change by WfC group members is the key to the social transformation necessary to undo these statistics.

The older areas of Mumbwa district (areas in which WfC has worked for two decades) have been recording change in family relations for a while:

"In the past, men in my area would never ever hold a baby. A man would never escort a woman taking a child to the hospital, even if the woman herself is also ill. And a woman was not listened to. We heard them, that's all. What they said went with the wind. Now we have women chairing these groups and Area Associations. ... How can we say a woman is inferior to a man?" (Area Association member, quoted in WfC, *River of Life*, 2000:46; also quoted in *Women in Touch,* 2007:9).

Box 5: FGD with older groups: transformation in family relations

> *"Before I joined the group in 2001 I used to farm 4 hectares; now I farm 9.5 hectares. This is because now I involve my entire family in farm planning unlike before where I thought and planned alone as the family head, and they only worked as I told them to. The family could only go as far as my eyes could see."* (Male participant)

> *"Now I understand my husband and he understands me. He has given up the old ways, of saying 'women can't do that'."* (Female participant)

> *'After my husband died his relatives wanted to come and grab my property. WfC trained us on this issue. I got the books out and showed them that the law says it is wrong. I was able to convince them. Because of that training I did not need to be resigned to the situation. I defended my rights and my children's rights.'* (Female participant)

"Gender training really helped my family life. We now work together, with my wife and children, since I became involved [in WfC group] *in 1998."* (Male participant)

"Human rights and gender training enabled me to practice joint decision-making with my husband since 2003 till he died this year." (Female participant)

The theme of transformation in family relations runs through previous WfC documentation as well. Two examples of men defying cultural stereotypes to take a more active role in the home, and affording their wives space to participate in family decision-making will suffice. The first example was recorded in 2007, the other in 2000:

"Cassava processing has always been considered to be a woman's job, meaning men cannot go to the field, dig the cassava roots and take them to the stream for soaking. As for me, because of the knowledge I have acquired through Women for Change on gender equality, I no longer see anything wrong in doing what is considered to be a woman's job. I cook for my wife and kids and do help with other house chores as well. I want to lead by example to show that some cultures and traditions can be changed." (WfC, *Women in Touch,* 2007: 6).

The second example is an in-depth interview featured in *River of Life* (2000), with one local trainer and teacher named Boyd. His is a case-study in how transformed gender relations at the fundamental level of family can have profound influence in shifting attitudes toward broader social acceptance of the ideal of women and men working together as equal partners in development.

Box 6: Transforming gender relations at family level: Boyd's story

During the December 1998 School holidays, Boyd and his family went to Mbale to visit his parents. Despite being with his parents, he continued helping his wife. For example, from the field the wife would go to fetch water and pound cassava leaves while he shelled groundnuts. After a few days, his father ... called him and asked him whether it was his wife who asked him to shell the groundnuts. Boyd told his father that it was at his own will that he did the work. "We are both from the field, we are hungry, so why should I wait for her to do everything while I am just seated? We need to work together to lighten the workload."...He further explained to his father about the importance of sharing workload. Boyd also started fetching water for his elder sister. The father realised that the changes taking place were bringing harmony within the family. He requested Boyd to invite Nkenga Area Association to open groups in Mbale. Ten groups were opened in Mbale in 1999. Boyd's father, mother and brothers are now active group members. The father is now the Cooperative Secretary. Boyd's family is now a model in Mbale area. The whole family shares responsibilities. Boyd's father was chosen to represent Mbale Area Association at the 2000 Women for Change Annual General Meeting in Lusaka (River of Life, 2000:52).

Boyd's story also tells a story about the potential impact of demonstrable change of attitude by those who are considered 'powerful' or 'influential'. WfC has tapped into this potential by targeting traditional leaders in WfC's human rights and gender program. A male Chief involved in WfC's human rights and gender program for traditional leaders admitted that he himself performed many of the roles traditionally considered as women's roles, and that he seizes every opportunity to advise and encourage people in his chiefdom to co-operate as couples in all house chores and to discuss development as equal partners (WfC, *River of Life,* 2000:50). Other chiefdoms declared a ban on negative traditional practices such as sexual cleansing, elopement and property grabbing[5] (*River of Life,* 2000:45). There were also documented instances of 'well off' husbands declaring publicly that they would not take on an additional wife or wives despite living in a culture where polygamy is not simply accepted but encouraged (*River of Life,* 2000: 48).

It bears mention that the process of realising that there was need for transformed attitudes and behaviour at the level of family relations was a shared experience between WfC rural communities and WfC staff alike. The focus group discussion and staff interviews in Lusaka and elicited views such as the following:

> *"My wife is freer than she was before I joined WfC. Before I would have flatly refused to let her set up her own business at the market. Right now she is at the market selling farm produce, and I am not worrying about whether she is doing the right thing or how she will manage the money."*
>
> *"Before WfC I thought that if, as a man, I supplied my wife with the money needed to meet the family's needs, that was enough to empower her; that 'men's empowerment' could somehow trickle down to the wife and to the family."*
>
> *"I come from Tonga land which is a very polygamous community. A person of my status would be expected to have four wives or more. After I became familiar with PEM I vowed that I would not do that. How can you promise a woman that you will love her and that you will build a home together, and then two years later you bring another one with the same promise? So PEM changed me at a personal level."*

The insights shared through the FGDs and WfC's newsletter are but a small window into the changing dynamic of family life in areas in which WfC has worded. Perhaps they might be triangulated by data such as trends in reporting cases of domestic violence, or cases of assaults connected with sexual cleansing and property grabbing from widows. Such data would need to draw

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[5] Property grabbing refers to the practice whereby a dead man's relatives descend on his homestead and help themselves to any property they can find, on the logic that the widow has no capacity to own anything. The feedback forum in April 2015 confirmed that this is a weighty issue, with emerging extremes such as relatives getting a head start on the grabbing while the man is on a sick bed.

from reports brought before both formal and informal dispute resolution forums. Other proxy data might be incidence of child marriage.

3.4 Transformation reflected through participation and leadership in WfC groups and Area Associations

> *"It is very rare to find empowerment as an individual. It is mostly in strength with others."*
> [Male participant, Mumbwa FGD with older groups]

In the areas in which WfC works, community members come together, following sessions of collective analysis, and form groups so that they may work together to address the issues identified. Initially, WfC practice was to start off with only women in the groups, and then gradually integrate men into the group once the women's confidence in their own ability to lead had grown (WfC 1998:D25-D26).With time the practice changed to emphasis on women and men working together from the founding of the group (WfC, *River of Life*, 2000:6). This is on condition that the leadership reflects gender balance: the chairperson of the group is always a woman, as is the treasurer. Men serve as vice-chair and secretary respectively.

Each group has between 35 and 40 members. As the number of groups in one area multiply, they come together to form an Area Association (AA). An AA would have roughly 10-12 groups. Each group nominates two representatives to serve on the AA' leadership. The Area Association (AA) is then registered as a self-governed Community-based Development Organisation (CBO). The AA plays the crucial roles of monitoring and coordination between the groups, conflict resolution, and outreach to the community, as well as fundraising and developing relationships with potential support institutions. The AAs in a district come together to form the District Development Association (WfC, *River of Life,* 2000:6-7). In Mumbwa district the older groups represented at the FGD ranged in age from 21 years to nine years. The new groups had only been established within the year (2014) and were yet to federate into an AA.

Since its founding WfC's operation has resulted in 122 Area Associations, bringing together 1,266 community-based groups spread across four provinces of Zambia. The numbers in and of themselves do not tell us anything about the quality of participation, organisation and leadership within the groups, but they do tell a story about sustaining solidarity and translating 'power within' into 'power with' so as to nurture agency ('power to') (VeneKlasen & Miller, 2002:45; Gaventa, 2006). The continued operation of the groups even in areas where WfC no longer has projects running is itself evidence of an empowering contribution at the grassroots (WfC, 2007 Evaluation; Womankind

2014). They are able to enter into new relationships with other entities as necessary to expand support for their activities. The most striking example is that of seed growers in Kapiri-Mposhi district and in Southern Province, who have proven themselves adept at seeking out new relationships and exploring new markets (WfC, 2012a). There are also examples of groups rejecting relationships that they do not regard as advancing their mission. At the feedback forum in April 2015 a group from Mumbwa narrated their experience of turning down a project on micro-credit after having scrutinised the terms offered and done some background checks on other areas where this organisation had implemented projects. 'We realised that they would simply make money from us and we would risk losing everything we have worked for.'

Multiplication of and continued survival of community-based structures led by women is a basis for hope that it is possible to attain empowered gender-balanced communities.

But women's leadership in the groups was not something that WfC just handed to them on a silver platter. By the testimony of a woman who has played a prominent role in her Area Association in Mumbwa district since the early 1990s, women had to claim that space: *"WfC started in 1993 here.. My secretary was a man, I was chairperson, but the secretary used to chair the meetings. So I went out of the group and most women left. We formed our own group after consulting the field animator."* (*Women in Touch,* 2007:4).

The groups have become a space for sharpening women's leadership skills and imparting confidence: *"When these meetings started, women sat around saying nothing. We had to have them in the groups because WfC insisted on that. Now they make substantial contributions at meetings. The women see to it that men help them instead of merely directing them as to what to do. Co-operation between men and women is not yet widespread."* (WfC, River *of Life* 2000: 49).

Through participation in the groups women see themselves (some for the first time) as having capacity to take part in decision-making and to lead. In depicting her Most Significant Change story in the focus group discussion, one woman from the older groups in Mumbwa drew a picture of a tortoise with its head emerging from its shell, signifying the moment when she joined the group and subsequently began to speak in community meetings [see Annex 6]. All shyness gone, she found herself elected a farmer's coordinator in a conservation farming project: 'I wasn't even present but they all insisted they had to elect me'.

But women are not the only ones who have been transformed through participation in WfC groups:

> *"Those of us (men) found in these groups are derided. Our group was originally a group for women. When WfC took it over, men were invited to join the group. So people still say we're in a women's group, and we're being changed into women. We tell them that women are the ones being changed. They're no longer timid; and the confidence they've gained is quite frightening to men who have suppressed women since time began."*(WfC *River of Life* 2000:49).

Not only have women grown in confidence, but there has also occurred a self-aware transformation in the attitudes of the men involved in the groups, so that they are able to distinguish themselves from the surrounding culture and express views which are supportive of women's empowerment and leadership.

Women and men who participate in WfC groups find that the confidence and leadership skills learnt through the groups position them favourably for leadership in other community based groups or subsequent involvement in entities such as cooperatives. During the FGD, one exercise required the participants to compare their experience of working with WfC and their experience in working with other organisations. The exercise revealed that even in those other organisations, the WfC group members were recognised as natural leaders. As one participant put it: *'These organisations came after WfC had already put down roots, so they get to benefit from WfC's work. So you will find that WfC members will be at the forefront.'*

Many are recruited as civic educators and trainers of choice by other organisations in various areas of rights, mostly gender-based violence and child protection.

There is anecdotal evidence to suggest that the groups themselves have matured in their understanding and practice of leadership. Research conducted by WfC (n.d.) on mentoring of rural women for leadership was candid in documenting a period of turmoil in the groups. It emerged that internal conflict had set in as members began to apply their newly acquired knowledge on leadership qualities to embark on a systematic process of analysis and questioning, which in some cases resulted in rejection of incumbent group leaders. Sustained leadership training ultimately produced accountable leadership in the groups and Area Associations. The groups stabilised and successfully managed subsequent transitions in leadership.

This experience underscores the caution on time frames for measuring social change. A narrowly framed time-bound evaluation during this crucial learning period might have concluded that there

were no viable grassroots structures that could guarantee continuity and sustainability of the empowerment work that WfC undertakes at community level. Yet the lessons drawn from this experience certainly have a ripple effect that translates into questioning poor leadership beyond the groups and AAs to community level, and at macro-level state-citizen interaction, as the two remaining sub-sections on findings will show.

3.5 Transformation reflected through exercise of community leadership

> *"WfC gave us knowledge of Participatory Education Methodologies (PEM), gender analysis, human rights education, child rights, - they woke us up! By giving Community Train-the-Trainer Workshops we have become community animators and everyone has woken up...!*
>
> *Before we had no idea of these things, women could not stand in front of men. Now we are community facilitators and women stand in front at these workshops and communicate all we know to the communities."* (WfC 2007 Evaluation: 35, attributed to an AA chairperson).

WfC groups and Area Associations have impacted their communities through initiating critical analysis and collective organizing. Some of these initiatives have led to local projects aimed at improving their communities' quality of life. Although the question of contribution to community was not posed directly, the FGD with older groups in Mumbwa district elicited numerous examples of this, as participants narrated their stories of change or spoke about their understanding of empowerment.

Box 7: Transformation reflected through exercise of community leadership

> *"In my community the nearest school was 16 Kilometres away but in 2004 we mobilised the community and we built a community school nearby".* (Female participant)
>
> *"In 1999 I mobilised our group and we built a food storage shed; group members use it and other community members can use it at a fee. Now we do not have to sell our produce hurriedly soon after the harvest at throw away prices".* (Female participant)
>
> *"Through advocacy in my community we convinced the MP (Member of Parliament) to get a clinic constructed in our area in 2009. In my capacity as chair of the Area Association I gathered the community members together to analyse the situation. I took them through a critical analysis process. Initially we took the decision to construct a clinic ourselves. We made the bricks and put up a small structure but within a short time we realised it was inadequate. So I gathered them again and when we analysed we saw that this problem needed a bigger solution. That is when we took the decision to approach the MP."* (Female participant)
>
> *"Now I speak freely in women's groups and I preach in church."* (Female participant)

Not surprisingly, the new groups did not register a similar level of community leadership. However, one young widow with young children, who is chairperson of her group was celebrated by her co-participants for having led a community initiative to establish an Early Childhood Learning Centre. The first in the area, the facility was only two weeks old at the time of the FGD.

There are also numerous previously documented examples of AAs taking initiative independent of WfC's programmed intervention to improve life in their communities:

For instance, some were putting their newly acquired knowledge on human rights to use by taking action against violations of rights in community that would previously have drawn little or no attention, such as pursuing child abuse cases despite obstacles such as police lethargy and a slow judicial system (*Women in Touch* 2007:6).

Others critically analysed the problem of school drop-out rates among girls and took appropriate action:

> *"Perhaps the main reason why girls drop out after the first four years of schooling is that schools that offer the next level of education are far, far away. Even the boys had to rent houses close to the school in order to continue their education. As an Area Association, we decided to build a block of rooms that are now being used as dormitories. We were gratified when twenty-six girls who had dropped out of school took up their education again, with the blessing of their parents. That is a welcome change."* (WfC, *River of Life* 2000:53-54; also documented in *Women in Touch,* 2007:11)

Recognition of women's new-found confidence and social acceptance of their leadership has rippled from WfC groups to community governance forums:

> *"Women in Moono area find themselves serving on committees. The Area Association is represented on the District Development Committee, on the Health Committee and on the Parent-Teacher Association. Even five years ago no one could imagine sitting on such committees and being listened to respectfully by men."* (WfC, *River of Life* 2000:53, citing a female interviewee).

There is anecdotal evidence to suggest that their participation in these community governance forums does influence the culture of leadership there. At the feedback forum to discuss these study findings in April 2015 one female AA chairperson from Moono recounted how she had noticed that only men held positions on all the public committees in the area, which sat oddly with the WfC practice that she had recently been exposed to. So she asked in one public meeting why all the committee

members were men. She was told 'since you are the person asking, you will be the one to join.' Shortly after joining, she was uncomfortable about being the only woman on the committee, 'so again I began to ask why'. 'Now one of the committees that I serve on has five women and five men, and that is the way we have maintained it.' She also changed some practices, for instance, where only the committee members got a meal allowance and the participants were not taken into account, even for meetings lasting all day.

Remarkably, women can now be found exercising leadership in areas previously closed (or thought to be closed) to them, such as in traditional leadership structures. This is attributable, in no small measure, to WfC's program on human rights and gender for traditional leaders. Following a workshop on gender and PEM, one female chief sanctioned the inclusion of women in the area's traditional courts. In another area a female chief expressed interest in naming women as *indunas,* an advisory and dispute resolution role conventionally restricted to men. During her period of involvement in WfC's program on training tradition leaders in human rights and gender six women had been installed to head villages (WfC, *River of Life* 2000:50; also documented in *Women in Touch,* 2007:11).

A male chief who had also participated in the program affirmed that women were also capable of being leaders and that there were seven female village head persons in his chiefdom. (WfC, *River of Life* 2000:50). A number of these traditional leaders continue to be active in working to rid their chiefdoms of cultural practices that dis-empower women, such as child marriage.

WfC has also sponsored numerous women over the years to attend national meetings such as forums on constitutional change, as well as international meetings, such as the World Social Forum (*Women in Touch* 2007, 2010). Their empowerment is evident in their active participation in these forums.

3.6 Transformation reflected in macro-level state-citizen relations

Having become aware of their 'power within' and 'power with', people find their voice as citizens and begin to engage with their leaders beyond their immediate community setting. There are a significant number of instances, recorded and unrecorded, of community members who are members of WfC initiating interactions with their Members of Parliament as well as taking aspiring leaders to task over their development agenda. There is even an incident in which a group of women attending WfC's summit in Lusaka sought audience (unsuccessfully) with the president (*River of Life* 2000). This anecdotal evidence points to a shift in mind set from viewing oneself as a subject to viewing

oneself as a citizen. Box 8 below recounts one remarkable story of engagement with a Member of Parliament.

Box 8: Transformation in macro-level state-citizen relations: Speaking truth to power

"In one community, after we had gone through a process of rights analysis with respect to land, water, food security, health and education, they decided that they wanted a forum with their MP. They had never sought audience with their MP before. We facilitated the convening of it. In the course of meeting one old woman brought in a bucket of water that had been drawn from the stream that the community used to draw their water from. She set it down, then scooped a cupful and, kneeling down in the traditional way in which women are expected to show respect to a guest, offered it to the MP: 'You have been speaking a long time; here is some water to quench your thirst.' He politely declined, and the instant change in her posture and demeanour took everyone by surprise. Rising to her feet, hand on her hip she asked him whether she and her children and neighbours were less human than him, for this was the water they had drank every day for years, sharing it with the frogs and snakes. The community got a borehole." (WfC Staff Interview, January 7th 2015; also documented in WfC, *River of Life* 2000:66).

The shift in mind set from subject to citizen is also evident in the way in which people in WfC areas relate with traditional authority. Some chiefdoms have involved residents in processes of strategic planning for the development of the area (although there is no information on whether these strategic development plans were ever actualised) (*Women in Touch,* 2010:17). But the very idea and process of participatory planning changes relations and expectations of leadership.

A 2007 edition of *Women in Touch* profiled a rural community whose engagement with government officials had been transformed: *''Government officials...treated us worse than we treat our goats.'* But as a result of engagement with WfC *'we have regained our dignity; we know our rights'* (WfC, *Women in Touch,* 2007: 9). The same edition also contains anecdotal reports of increase in voter registration and electoral turn-out in areas in which WfC and subsequently WfC community-based trainers in AAs conducted training in human rights, gender and leadership (*Women in Touch,* 2007: 10). However, there is nothing in WfC's literature to suggest that this has ever been independently verified from electoral roll data. This is one example of an issue on which WfC's stories of change data from the community level can be triangulated with macro-level data. We pick up on this in the final section, 'Implications for WfC's work'.

Perhaps the most notable feature of this shift in mind set from subject to citizen is the exercise of political agency by rural women who have had exposure through WfC. The 2000 evaluation noted the growing political participation of women:

> *"Another change is that women are now forthright and are not afraid to contribute to serious debates. This has been recognised and we have two women constituency chairpersons. There is co-operation between women and men, and all the people in the area know their rights. This has given them the courage to approach their members of Parliament and ask them what they have done for their constituencies"* (WfC, *River of Life* 2000:54).

Two examples emerged from the FGD with older groups in Mumbwa district:

> *"My wife was elected as a Ward Councillor in 2011. Since then she has overseen the sinking of 20 boreholes through the Constituency Development Fund (CDF)."*[6]

> *"I contested for a parliamentary seat in 2001, the first woman to ever do that in our constituency."*

It might be worthwhile and inexpensive to compile comprehensive data on WfC members who have contested or held office, whether male or female. This would broaden out beyond political office to associations such as trade unions, cooperatives, chambers of commerce, and school boards. It would give a picture of how WfC members' (particularly) participation and leadership in these forums compares to the general population, and make a specific case for the effectiveness of WfC's approach to empowerment and nurturing of leadership in rural Zambia, which could be replicated elsewhere.

We also noted from available literature and through conversations with women that it is not uncommon to find WfC women who, as young girls, had dropped out of school deciding to re-enrol in afternoon classes, having become aware of the value of this investment for their self-empowerment. Some also have an eye on formal political leadership, and formal education is an eligibility requirement. Examples include the chair of a seed growers' group, two District Development Association chairs and an AA chair, all of them from Mumbwa district and Kapiri-Mposhi districts. This data could be made more precise and comprehensive, gathering information from AAs on their members who have re-enrolled in school.

Box 9: Women equipping themselves to Lead: the Story of Veronica

> The 2010 edition of *Women in Touch* carried the story of Veronica, over 50 years old who decided to go back and enrol in Grade 9, taking five other women along with her: 'Veronica plans to study social work. Already she envisions becoming a Councillor, or better still, a parliamentarian, and is confident of success. She recognises education as the one asset that cannot be stripped from a person, and encourages other women to return to school.' Her example prompted her daughter to return to school. Her daughter had dropped out of school in Grade 10 to

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[6] Referring to Mrs. Chiyabi, the first chair of the Mumbwa District Development Association (MUDDA) whose story was featured in the Women for Change Newsletter *Women in Touch,* Issue No.1, 2013.

get married. So this school had a grandmother in grade 9, her daughter in grade 10 and granddaughter in Grade 1! (WfC, *Women in Touch,* 2010:16).

4. PEM's contribution to economic empowerment

"The entry point must be a change in one's mind set: 'transformation at the personal level-power within; ...a firm conviction that I can stand up for my rights and stand with others to defend theirs. ...Economic empowerment is incidental." [Staff Interview]

It became clear during this research process that the debate on PEM's contribution to economic empowerment carries with it a peculiar sharpness within WfC and beyond, and so we must address it directly.

On account of lessons learnt from evaluations of its predecessor program, WfC is particularly wary of definitions of empowerment that give prominence to the economic dimension, going no further than simply altering material circumstances (WfC 1998:C17-C20). WfC's mission statement therefore underlines its vision for deeper transformation where women are empowered so as to achieve social change (WfC 1998: C20). Therefore while change in material circumstances is welcome it is neither the goal nor the main yardstick for measuring empowerment.

Of course the distinction between 'survival' and 'strategic' needs is a rather blurred one, and often investment in addressing survival needs does pay off in terms of the strategic. WfC practice is not so rigid as to overlook this reality; and WfC *has* undertaken economic empowerment projects. Examples of these are set out in the box below.

Box 10: Examples of Economic Empowerment Projects Supported by WfC

− Investing in skills for youth in carpentry, bricklaying, metal work and construction (WfC, *Women in Touch,* 2010:12);

− Complementing communities' efforts by equipping community schools with books, writing materials and fees and uniforms for orphaned children, as well as advocacy to get government to invest more in incentives for teachers in remote rural areas (WfC, *Women in Touch,* 2010:4);

− Providing a borehole to a community targeted at easing the burden on carers of HIV & AIDS patients (a burden which falls disproportionately on women) and boosting food security (WfC, *Women in Touch,* 2010:3);

− Equipping groups with irrigation pumps, livestock and linking them up with extension services for improved agricultural skills (WfC, *Women in Touch,* 2009:9);

− Linking communities to loan facilities for agricultural inputs, and to available government resources such as the Rural Investment Fund and the National Seed Certification Institute (WfC, *Women in Touch,* 2007:4; WfC 2007 Evaluation: 15).

The question is therefore, not whether economic empowerment matters at all. Rather, it is a question of the order of importance or emphasis, or indeed the starting point. WfC recognises that the remote rural communities in which they work have high poverty levels. However, change in material circumstances does not thereby become the central focus. Rather, 'poverty is not a norm' has become a mantra within WfC: drawing people into critical reflection on their own fatalistic attitude toward their socio-economic circumstances (for example, in Nkenga, Western province, and Haanzala in Southern Province, WfC, *Women in Touch,* 2007:7). Transforming this fatalistic mind set becomes the entry point, leading to solidarity to apply their collective energy to identify the issues and make a plan for action.

WfC programs in these areas did not respond to this reality of poverty through only increasing income. Social change was still seen as the broader framework or context within which economic empowerment could have meaning. WfC's concern went beyond simply income poverty to 'its offshoots of voicelessness, powerlessness, lack of self-esteem, lack of dignity, lack of opportunities and general human deprivation' (WfC, *Women in Touch,* 2009:9). Economic empowerment is celebrated for what it contributes to holistic freedom rather than as an end in itself. For instance, the emphasis is on positive impact for women in relation to the fight against HIV & AIDS:

> 'Most of the women in WfC operational areas are poor. Therefore, women's vulnerability and dependence on men increases their vulnerability to HIV by constraining their ability to negotiate for safer sex. But with economic empowerment ...women are now able to be independent without having to 'exchange' their bodies to earn a living' (WfC, *Women in Touch,* 2009:28).

Interventions such as seed multiplication were intended and justified not simply in terms of boosting income for the farmers, but as crucial in facilitating food sovereignty and challenging entrenched exploitation by commercial hybrid seed growers (WfC, *Women in Touch,* 2009:9).

At the FGD with WfC staff in Lusaka (November 2014) the question of the place of economic empowerment within this broader long-term process of personal and social transformation generated intense discussion. On several occasions women in communities had posed this question to WfC field animators: 'I know now that I am socially empowered; I have the knowledge (e.g. on gender based violence), but I have no fall-back economic security. The knowledge alone will not solve my

problem.' This same debate happened in WfC's early years (WfC 1998: C18; WfC, *River of Life* 2000:47). *River of Life* (2000) documents such a discussion with the first members of the Area Association in Sinazeze in 1993, just one year after WfC had started working in the area. The focus had been on gender analysis and awareness raising on human rights. The community members posed this question:

> *"We realise the importance of these changes- we are now living in harmony [between husbands and wives], we know the importance of sending our children to school (particularly girls) - but we have no source of income. How do we budget without money?"* (WfC, *River of Life* 2000:47).

WfC's response at the time was to engage the community in a process using PEM tools such as critical analysis to identify viable projects. They settled on improved agricultural production. During that farming season, WfC gave loans for agricultural inputs (seed, fertiliser and herbicides), but this did not go too well due to late planting. In the next season, WfC helped groups to purchase shared implements for improved farming. They did so well that group members no longer needed help to buy inputs (WfC, *River of Life*, 2000:47). Arguably it was on account of the foundation that had been laid in social empowerment and building of solidarity ('power with') for a whole year that the people were able to analyse their situation and systematically work through project identification, deepen group solidarity and analyse what had not worked well in order to make the necessary plans and adjustments. Perhaps an income generating activity in the absence of this preparatory work would not have been so successful.

 A section of staff at the FGD (Lusaka, November 2014) favoured varying the entry point depending on context; that in some contexts it might make sense to start with economic empowerment. This was proposed in light of limited flexibility in WfC's current funding context. In the funding context of the last decade or so, the design of a sector-specific, time-bound project largely predetermines the entry point and specifies the parameters, thus limiting the amount of time and resources that WfC might invest in foundational social empowerment activities. WfC's work in Chongwe is, by the admission of some staff, an illustration of this. A USAID funded project to improve community participation in management of natural resources had as its focus tree planting and forest management, with a component on encouraging compatible livelihoods such as bee-keeping. The project was only one year long and has already officially come to an end, yet group cohesion still remains a challenge, and the process of forming an Area Association there still continues to present challenges (Staff interviews February 26th 2015; December 10th 2014). Without the base of solidarity it is difficult to

ascertain the sustainability of whatever gains have been made, even gains in economic empowerment.

Sentiments expressed at community level show that people definitely have an appreciation for this deliberate choice of emphasis. A community member from Mangango Area Association reflected in 2000:

> *"Poverty is still there, but we have learnt the important lesson that we must identify our problems ourselves, and use our own efforts to overcome them. WfC gives us technical advice and is ready to loan us money if they're satisfied that our plans for investment are sound."* (WfC, *River of Life* 2000:53)

And a village headman interviewed for the 2007 evaluation reflected:

> *"WfC gives education that can't be taken away. Other NGOs give and leave. WfC has a radically different way of working that ensures people can use even the smallest thing productively."* (WfC, *River of Life* 2000:44).

In the same year a DDA chairperson speaking at WfC's 15th anniversary celebrations appreciated the fact that income generating activities had enabled people in her district to educate children, some up to university level. However, her most glowing praise was reserved for rural people's new-found ability to engage in constitutional debates and 'understand constitutional matters through sensitisations and awareness campaigns that WfC is carrying out' (WfC, *Women in Touch,* 2007:5).

At the FGDs, deliberations that touched on this issue brought out a stark difference between WfC's older groups and the new areas. It is important to note that no question was posed concerning the place of economic empowerment, but their views on it have been gleaned from their definitions of empowerment and their stories of change. It was not surprising that in the area with established groups, an overwhelming majority of FGD participants spoke of empowerment in terms of personal and social transformation, rather than simply change in material conditions. Box 11 below sums up their definitions of empowerment.

Box 11: FGD with older groups in Mumbwa district: Empowerment as more than change in material conditions

Empowerment means:

- *We used to think of empowerment in terms of someone bringing us wealth, but now we say 'give us knowledge, and we will look for the wealth ourselves and even help others get it.'*

- *when someone gives you advice rather than material assistance: the advice you can continue to use for a long time, rather than sit back and wait for the next dose of material assistance;*

- *an increase in knowledge, which then has the result of improving your life chances (citing example of knowledge on HIV);*

- *becoming aware of where you are and where you could go;*

- *having freedom to express yourself, to stand before people, to go to the right offices without fear and ask for assistance that you know you are entitled to;*

- *joint responsibility over assets between husband and wife; a wife should be able to decide to sell a goat in order to take a child to hospital without fear of being reprimanded for it;*

- *it is very rare to find empowerment as an individual; it is mostly in strength with others (empowerment as solidarity);*

- *when we know our rights and no one can suppress us;*

- *I am empowered because now it is easier for me to explain things to others; having the ability to pass on knowledge.*

What came as a surprise is the contrast between the two new areas, the one in Chongwe and the other in Mumbwa. Although the groups were established in the same year (2014), the discussion in Mumbwa showed deeper reflection on what empowerment means, drawing out elements of personal and social transformation, while the discussion in Chongwe emphasized change in one's personal material circumstances. In Chongwe, the responses on understandings of empowerment as well as on the most significant change dwelt on matters such as higher crop yield, moving from a grass thatched roof to iron sheets, and taking children to school. Some of the discussion among the new community leaders in Mumbwa did refer to material benefits (e.g. being able to expand my field), but it predominantly dwelt on personal and social transformation. Box 12 below sums up their views.

Box 12: FGD with new groups in Mumbwa district: Empowerment as more than change in material conditions

Empowerment means:

- *Women being able to work alongside men and contribute ideas;*

- *To have the power to do something; for example, we now have the power to go into our communities and teach other people what we have learnt;*

- *To have the power to bring change to our community because now our minds glow;*

– To empower someone is to transfer knowledge so that the person can sustain his or her life without depending on handouts, be they handouts from government or from donors, and that person can carry on independently even without you.

The contrast between the two 'new' areas can be directly attributed to mentorship. Despite being new, the Mumbwa groups benefit from their close proximity to established groups in another part of the same district. This proximity permits more regular contact through training events and peer exchanges as well as informal contact not necessarily mediated by WfC. Chongwe on the other hand can only rely on exchanges mediated by WfC, with few opportunities for hands-on mentorship.

To sum up this discussion on the place of economic empowerment within PEM, the evidence available from previous documentation as well as from the field work for this study suggests that a PEM approach positions economic empowerment within a broader holistic conception of empowerment as personal and social transformation. PEM lays the foundation, creating the conditions necessary for initiating economic empowerment projects and for guaranteeing their sustainability.

Previous documentation and the views that emerged from the FGDs with community groups suggests that WfC has a clear and clearly understood position on the issue of how economic empowerment fits into the broader understanding of empowerment as being primarily about change of mind set. However, WfC must find a way to take account of concerns expressed by some staff, namely that the brevity of project timeframes in the current funding environment may make it difficult to lay the social empowerment foundation prior to implementing a project whose sole focus is economic empowerment.

A process of reflection on how PEM's emphasis on personal transformation and social empowerment may still be harnessed under such constraints would contribute to innovation in WfC's approach. The process would be greatly enriched by learning from other organisations, or other country contexts, and with input from communities on their views on priorities and sequencing. Importantly, WfC would become part of a larger conversation exploring the interaction between the multiple dimensions of women's empowerment. The Pathways of Women's Empowerment project (hosted at the Institute of Development Studies, IDS-Sussex) recently released research findings that point to the importance of this conversation. They fault empowerment approaches that stop at giving individual women opportunities for economic and political empowerment without addressing the underlying structural constraints that perpetuate inequality. While underlining that changing attitudes

and values is as important for women's empowerment as changing material circumstances, they also observe that in some contexts, women's ability to exercise voice and control over their lives is linked to the ability to generate a regular and independent income.

5. Implications for WfC's Work

The findings discussed above call for critical reflection and action within WfC in three broad areas:

- Current practice of PEM at community level: how best to support community-based trainers and learning from the field;
- Critical reflection on PEM tools;
- How to adapt WfC's monitoring and evaluation systems so as to capture outcomes and gradual transformation in an output-driven funding environment.

5.1 Supporting PEM at community level and learning from the field

The effectiveness of using PEM to engage with rural communities has been validated over the years, both by the communities in which WfC has worked, and by external evaluations (2007 Evaluation: 74; WfC, *River of Life,* 2000:23, citing 1999 Evaluation). A participant in the FGD with older groups in Mumbwa district singled out inclusiveness as the distinguishing feature that makes PEM the most useful approach:

> *"These PEM tools help everyone to participate, whether I went to Grade 8 or not."*

Central to PEM is the practice of peer learning, rather than the paternalistic transmission of knowledge from a teacher or expert: 'People educate each other through the mediation of the world' (Freire 1970: 32). In WfC's practice this commitment to peer learning is reflected through peer exchanges and training of group and Area Association leaders to train others in their own communities and in new areas.

However, deliberations at the FGDs, as well as previous documentation suggests that not enough is being done to 'learn from the field' and support the efforts of these peer trainers. Concern was raised about long gaps in between the monitoring visits by WfC, and pleas made for more support in the form of transport to get around. The FGD with staff confirmed that dwindling funding has impeded regular monitoring by field staff, which used to be a central feature of WfC operations. In both the 2007 evaluation and in this study, field animators mourned the shrinking of opportunities for regular collective reflection on lessons learnt from their respective areas. Some long-serving staff are nostalgic about the weekly reading hour which is one of the spaces for collective reflection that has now disappeared.

WfC is missing opportunities for appreciating and documenting the impact that its community-based trainers in the AAs are having. This calls for investment in WfC's monitoring system to verify that the training is actually happening, where, when and that content and method are sound, especially where trainers have only had a short period of training themselves, as in the new area in Mumbwa district. This ensures quality control. Also indispensable are institutional spaces that allow for regular reflection among WfC staff. Without these there will be few opportunities for growing the vision of empowerment as holistic transformation, and nurturing among staff an appreciation of PEM as a unique feature of WfC's work that reflects its philosophy of empowerment, rather than simply as a set of tools. The 2007 evaluation also recommended making greater use of the field reports and AA reports to analyse trends over time, in order to draw out 'big picture' lessons on what conditions enable or constrain empowerment (WfC 2007 evaluation: 46, 67).

In addition to creating institutional spaces for learning from the field among WfC staff, there is need for forums that allow for collective reflection among the peer trainers at community level. Interaction among themselves would facilitate mentoring of the newer ones.

5.2 Critical Reflection on PEM Tools

Both WfC staff and community group members had opportunity through the FGDs to reflect on PEM tools, highlighting strengths and weakness and recommending improvements. There is no doubt that there is a sound understanding of PEM at the grassroots level. The group leaders we interacted with in the FGDs in Mumbwa district do not simply know the PEM tools. They also understand why they are used and what they enable people to see and achieve. A few examples from their group work and discussion illustrate this:

Box 13: Community trainers' reflection on PEM tools

(On the River Code):

− *'People learn and see the difference between handouts and being enabled to get the thing for yourself.'*

− *'It teaches group members to fully participate and not wait to be spoon-fed'.*

− *'It affirms that members have the ability to achieve their goals. Someone shows you the way; you don't just stand there, you walk now!'*

− *'You are helped so that you can pass on the knowledge and help others'.*

(On the Development Tree):

− *'People are able to use it to assess their own position, who they are and where they are'.*

Even among the new groups in the district the level of knowledge and depth of analysis was impressive, as was the fact they are already training others. It was clear that once they had caught the vision, they did not see PEM as something one only does on a grant. It emerged spontaneously from the discussion that these are tools that they draw from even in informal interaction. The Development Tree, the Five Friends of Planning, and the River Code stood out as easily applicable to analyse situations in one's own life, with family or with people seeking advice in community:

- *'you can even use for personal reflection at home'*;
- *'it is personal and immediately relevant'*;
- *'Even within family people are using the River Code to stand on their own'*;
- *'Even a housewife can assess* (using the Development Tree): *"when I harvest I am at this level; last year I was at the same level; why am I stagnant?"'*.

When asked what they would improve about the tools they had very specific, clearly thought through suggestions to make, although overall they found them to be clear and effective. To start with, they have innovated on the tools by incorporating music, stories and drama to communicate the message. They are not just passively re-enacting what they have been taught by the WfC field animators. The use of music, stories and drama they have found most useful in reaching out to those who initially choose to be onlookers or bystanders. Some of these they compose themselves, while others draw from familiar folklore to teach new lessons. Suggestions made toward improvement include:

- Inclusion of training on managing group dynamics into the River Code;
- Developing more visuals or practical scenarios to make the Critical Analysis tool less abstract.

Although this is only a partial glimpse based on the experience of community-based trainers in one district, it does reinforce the message that the opportunity to learn from the field must not be missed.

The FGD and interviews with WfC staff also lauded PEM tools mostly for enabling inclusiveness. They yielded the following suggestions on improvement of PEM tools:

-   Think through how PEM tools might be adapted for use outside of a rural setting, for instance, in training sessions with professional groups;

-   Consider translating them into local language for ease of use, particularly by community-based trainers (noting that people have to this 'on the spot' anyway);

-   Broaden the range of participatory methodology tools that WfC uses beyond the ones that WfC currently refers to as PEM tools, and encourage community-based trainers to try out the new tools;

-   Make the PEM reflection and action process truly cyclical, engaging communities in regular periodic processes of participatory review, since currently the process mostly takes place at the beginning of engagement with a community and the 'picture' does not get regularly updated.

Some of these recommendations do have funding implications, and so the next section is particularly relevant.

5.3 Capturing outcomes and gradual transformation in an output-driven funding environment

Significant changes occurred in the funding environment for development work in general, stemming from the Paris Declaration on Aid Effectiveness issued in 2005.[7] Two of these changes have had an effect on the funding of NGOs. The first, that donor funding would be aligned with the governments' national development plans and delivered through the government's systems as the first option for management of aid programmes. This translated into basket funding for a sector, from which both government and NGO programs could draw for specific interventions, for instance the Governance, Justice, Law and Order Sector (GJLOS) program. Organisations then get funded for specific interventions or activities, rather than for programmes. The second change that affected NGOs is that funding for NGOs working in specific sectors would be channelled through a network or umbrella working on an issue or area of interest, rather than to individual organisations. This was in the interest of reversing a trend of fragmentation and duplication. This funding too would be availed only for specific interventions following approval of proposals presented. Significantly for WfC, donors also stopped giving specific funding for 'gender' work, expecting that gender would be mainstreamed in all projects. Funding earmarked for advocacy was also cut back. Concerns about how this changed funding environment would affect the work of WfC, which has always been

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[7] *Paris Declaration on Aid Effectiveness* (2005) and *Accra Agenda for Action* (2008), available at http://www.oecd.org/dac/effectiveness/34428351.pdf.

organised around programmes rather than specific project interventions, were raised in the 2007 evaluation and have been carried through subsequent documentation.

The Paris Declaration also emphasized accounting for results. This accounts in large measure for the shift in development practice toward quantifiable outputs tied to project objectives. Within the specified project time frame results must be attributed directly to the project's activities, on a template designed by the donor's monitoring and evaluation system. One can immediately see how such an emphasis is rather mismatched to work of the transformative kind that we have been discussing here. Work that involves transforming mind sets and translating that transformed mind set into relationships at the various social levels would need more than a five-year project (and some projects are even shorter than that, such as the one-year project on community management of natural resources in Chongwe district).

With this shift in emphasis toward measurable outputs in development, women's rights organisations have come under increasing pressure to demonstrate causal links between their interventions and positive change in the lives of women at community level (Miller & Haylock, 2014; Batliwala & Pittman, 2010). The challenges associated with attempting to fit what is inevitably a long-term goal (transformation in gender relations at cultural, social, economic and political levels) into fixed time-frames within which to report 'results' have been discussed at length (Miller & Haylock, 2014; Batliwala & Pittman, 2010). The discussions have also highlighted the limitations of Monitoring and Evaluation (M&E) approaches that emphasize causality in a linear sense, failing to capture the dynamic nature of social change, and the reality that gains may take a very long time to register. Patricia Chambisha, who served as a field animator from the founding of WfC in 1992 till 2009 reflected: 'Changing people's attitudes, traditions, beliefs, and practices was the most difficult challenge. It takes time for people to be convinced and see the need to change some of their attitudes and beliefs that have a negative impact on development' (WfC, *Women in Touch*, 2010:18-19).

Since change, especially change in attitudes and the reflection of such attitudinal change through transformed power relations, is hard to measure, conventional M&E exercises resort to reporting on activities and the number of beneficiaries reached by those activities. An end-of-project evaluation, for instance, might report that 'Community workshops on human rights, negative cultural practices, entrepreneurship' reached 48,600 people. Unless this can be complemented by a participatory assessment with the people involved, it tells us nothing about what impact this knowledge had on the lives of these people and their communities.

Linear oriented M&E approaches may not allow for recognition of the fact that the very success of women's empowerment programs can generate backlash and setbacks, which risk being reported as 'failures' if evaluation is in the short or medium term, failing to take a long-term and dynamic view of social change. For instance, in the experience of Women for Change (WfC), at the entry stage, men in a community may hold back from participating in groups, or treat the groups with lukewarm distance, only to become enthusiastic supporters much later after they have seen women's groups succeed (WfC, *River of Life,* 2000)[8].

From the field work findings reported here it is clear that WfC's approach is seen as unique and is valued by the communities in which WfC works. Members of the older groups in Mumbwa, who were also involved in projects with other organisations compared their experiences. In brief, WfC's use of participatory methods in a form that is easy to pass on and spark independent (unmediated) critical reflection and action in the communities was singled out as WfC's distinguishing feature, which they valued greatly. So then, in the current time-bound output-driven funding environment, how should WfC honour its commitment to the vision of transformed rural communities in which women and men work together as equal partners for sustainable development?

Both the staff FGD and interviews with staff affirmed that WfC should still maintain this vision despite the circumstances; keep its eyes on the prize amidst the distraction of time-bound outputs of disparate projects. In practice this calls for spotting of opportunities to in-build deeper periodic critical reflection even in the context of a bounded project (Staff interview, January 7th, 2015). For instance, the project in Chongwe was about sensitising the community on forestry, and training in livelihood skills that are compatible with forest conservation, such as tree planting and bee keeping. However, the analysis in community meetings extended to impacts of deforestation that have a bearing on gender relations: women walking longer distances and taking longer to find firewood, resulting in suspicion and tension in the home, leading to higher incidence of gender based violence. This opened up broader discussion of why gender based violence is wrong, in a context where a significant number still view it as justifiable (Staff Interview, February 26th, 2015).

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[8] *River of Life* (2000) is an internal assessment of WfC's work. It is based on interviews conducted with WfC group representatives, group members, local leaders, WfC board members, WfC field animators, donors and some members of the general public.

Ideally, as had been WfC's practice in the past, specific projects such as income generating initiatives, would only be introduced in the second or third year, once the groundwork in gender and PEM had been laid, groups formed, and solidarity established. Staff raised concerns that the current structure of funding often leaves no time for this preparatory work, and therefore takes the focus away from long-term social empowerment and narrows it down to the specific project outputs. However, in interviews, some staff pointed out that even in the context of a time-bound project there is no reason why WfC should not lay out the entirety of its vision clearly before a community, making it clear what its own goals as an organisation are; then lay out the goals of the specific project. A candid conversation with the community should then follow; on what aspect of this long-term transformation can realistically be achieved in the project time-frame, and what they will use as a measure of change over time. This exercise would be greatly enhanced by more rigour at the entry point, in gathering baseline data, an area that has been pinpointed in successive evaluations as one of 'perennial weakness' (WfC 2012b).[9]

It will likely emerge that in addition to reporting the 'outputs' as required by the donor (such as how many people were reached through sensitisation workshops, how many farmers are harvesting how much honey etc.) WfC and the communities they work in will also develop a system for capturing 'outcomes'. A focus on outcomes looks at how the project has contributed to change, rather than attributing results wholly to the project. An outcome focus is about impact, and therefore it also captures unexpected results, and reflects on why a project intervention worked or did not work (Batliwala & Pittman, 2010; Goyal 2010). The insights on gender dynamics that emerged from the discussions with the communities in Chongwe, for instance, will not be reported on the donor's template as an 'output', but they are of crucial importance to WfC's vision. These would need to be captured outside of the project reporting template. Similarly, group cohesion and building of rural social movements is important to the work of WfC, but it is not important to the project's donor. A system of reporting outcomes would also monitor progress made on the movement building dimension.

To a degree, WfC's newsletter *Women in Touch*, is a step in this direction toward a culture of evaluative outcome-driven documentation. Besides the newsletter it is not clear that WfC has a systematic way of collecting and storing such outcome-oriented information for WfC's own use in the long term, outside of the donor's output-driven reporting requirements.

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[9] A reflection exercise in 2012 that preceded WfC's strategic planning highlighted "Inability to fully communicate results on the ground including through some external evaluations partly due to inadequate baseline data" (WfC, 2012b: 2).

The newsletter itself could be put to greater use as a space for reflecting on and communicating outcomes. The 2007 evaluation observed that the newsletter provided a space to recount progress and lessons learned. However, the evaluation also pointed out that the newsletter's role could be strengthened by making it more reflective on goals and impacts: *'In addition to writing about success, the documents should capture the social disruptions taking place as a result of own and others' interventions. Present documentation does not adequately show changes achieved through implementation of activities. Useful documentation would indicate results achieved both successes and difficulties and what lessons can be learned from these experiences.'* (WfC, 2007 evaluation: 31). The newsletter can also serve as a space for documenting and reflecting on WfC's methodology and the lessons learnt from applying it in different contexts, and the conditions that enable or impede its effectiveness.

WfC's monitoring and evaluation systems should also be on permanent alert for research opportunities to triangulate what emerges from 'stories of change' within the communities with macro-level data. Some of these data have been highlighted in preceding sections, namely data on trends in reporting of domestic violence cases, trends in voter registration and voter turn-out, numbers of women contesting for office in WfC areas compared to overall population figures, and numbers of older women re-enrolling in school.

In order to adapt its M&E systems and improve on its ability to demonstrate the impact of its work through clear communication of outcomes, WfC might consider including a request for funds for research and documentation in every project proposal. Where there is no flexibility in the project funding to allow for this, WfC might consider making applications for companion funds from smaller donors who value the kind of change that WfC works for. Examples of such donors include Womankind, Global Fund for Women, and AWID.

The adaptation of its M&E system is important and strategic for WfC for three reasons. First, it will help WfC to reflect on how best to measure outcomes and communicate them both internally and with external audiences. It will give WfC insight, for instance, on when stories of change from the grassroots will suffice to demonstrate transformation, and when those stories of change might need to be augmented by other kinds of data, such as census and other official sources or research findings by third parties working in the same geographical area or subject matter. Second, it positions WfC as one of the leaders in building a community of practice among women's rights organisations to

develop and advocate for adoption of monitoring and evaluation methods that best capture change in women's lives at the grassroots level. Thirdly, it is important in persuading community members, other NGOs, policy makers and funders that engagement with rural communities through popular education methodology (PEM) really does indeed translate into empowerment and enhancement of women's leadership capacity.

6. Conclusion and Summary Recommendations

It seems apt to conclude with the words of a member of the women's movement in Zambia, which sums up this study and its implications for WfC's work:

"The work of WfC is needed everywhere – this kind of empowerment of women using PEM is very helpful. We want it to spread ... other provinces need it. They need to share their successes – especially the difference their approach has brought. They especially need to show their methodology so people can see the map of how to do it – what WfC has done, how they have done it and the depth of the impact that their different approach has brought." (WfC, 2007 evaluation: 45).

This study marks a beginning in responding to the concern expressed in this plea. It has demonstrated that WfC's use of PEM has contributed to the kind of multi-level transformation that leads to women's empowerment and makes it possible for women and men to work together as equal partners in development in rural Zambia.

The specific action points for improvement that have been identified throughout the report are summed up here for ease of reference:

(i) Triangulation of data for more robust documentation of the results of WfC's work. Four examples have been discussed in the report: data on trends in reporting of domestic violence-related cases, data on school re-enrolment by WfC group members, data on contesting for and holding of various offices by WfC members, and data on increase in voter registration and voter turn-out in WfC operational areas. This will move WfC's data from anecdotal to comprehensive. The process need not be expensive. The last three kinds of data can be gathered by AAs on their own members, past and present, and some of it can be gathered from publicly available sources such as the electoral roll.

(ii) WfC must find a way to address concerns expressed by some staff, namely that the brevity of project timeframes in the current funding environment may make it difficult to lay the social empowerment foundation prior to implementing a project whose sole focus is economic empowerment. A process of reflection on how the PEM process may still be harnessed under such constraints, with learning from other organisations, or other country contexts, and with input from communities on priorities and sequencing, will certainly benefit WfC.

(iii) WfC needs to invest in institutional spaces that allow for regular reflection among staff, particularly the field animators. Without these there will be few opportunities for growing the vision of empowerment as holistic transformation, and nurturing among staff an

appreciation of PEM as a unique feature of WfC's work that reflects its philosophy of empowerment, rather than simply as a set of tools. In addition to creating institutional spaces for learning from the field among WfC staff, there is need for forums that allow for collective reflection among the peer trainers at community level to allow for mentoring and increased opportunity for spontaneous and informal interaction that does not depend on facilitation by WfC staff.

(iv)   Review the recommendations made toward improvement of PEM tools and decide what to prioritise.

(v)   Recommendation on adaptation of WfC's M&E systems: adaptation would enable an emphasis on outcomes rather than outputs, and improve on WfC's ability to demonstrate the impact of its work through clear communication of outcomes. WfC might consider including a request for funds for research and documentation in every project proposal. Where there is no flexibility in the project funding to allow for this, WfC might consider making applications for companion funds from smaller donors who value the kind of change that WfC works for. Examples of such donors include Womankind, Global Fund for Women, and AWID.

(vi)   General recommendation: this study's geographical scope was limited. WfC might consider replicating it in other operational areas to make the data more robust and the lessons from it more instructive both for WfC's own work and that of other actors in the sector.
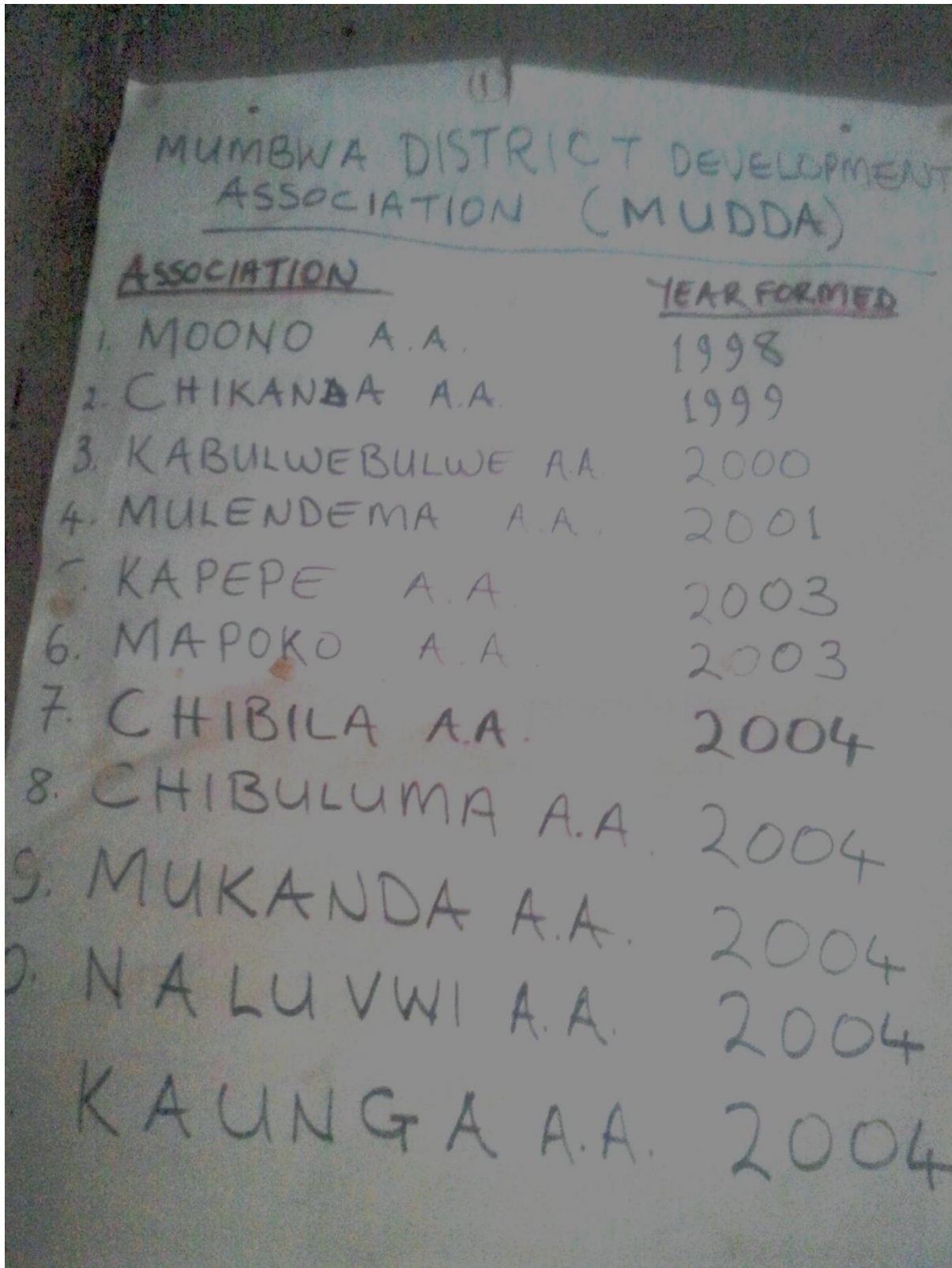
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8. Annexes

Annex 1: Chart on Mumbwa District Area Associations

MUMBWA DISTRICT DEVELOPMENT
ASSOCIATION (MUDDA)

ASSOCIATION	YEAR FORMED
1. MOONO A.A.	1998
2. CHIKANDA A.A.	1999
3. KABULWEBULWE A.A.	2000
4. MULENDEMA A.A.	2001
5. KAPEPE A.A.	2003
6. MAPOKO A.A.	2003
7. CHIBILA A.A.	2004
8. CHIBULUMA A.A.	2004
9. MUKANDA A.A.	2004
10. NALUVWI A.A.	2004
KAUNGA A.A.	2004

Annex 2: Checklist for Focus Group Discussion with WfC staff

Biographical information

[Form will be passed around to fill in details. In addition to this:]

- Brief information on training background
    - Did you have specific training and/or experience in Participatory Education Methodology (PEM) prior to joining WfC?
    - If you did not, how did you acquire the knowledge, skills and attitude needed to become a PEM practitioner?

Views on Empowerment

[give participants time to reflect either individually or in pairs, note down if they wish, then report back]

- What were your views on women's empowerment before you started working for WfC?
    - What symbol, image, analogy or story would accurately represent the view you had?
    - Has your work challenged that view at all?
    - Did you find that your view was consistent with what you encountered in communities you worked in, or different?
    - What symbol, imagery, analogy or story would accurately represent the view you currently hold on women's empowerment?
    - If your current view differs from your view prior to joining WfC, what accounts for this change?

'Most Significant Change' Stories on PEM

[give participants time to reflect either individually or in pairs, note down if they wish, and then report back]

- Tell me a 'most significant change' story that has come out of your application of PEM in the course of your work at WfC. [the story could be about yourself, a community group or individual].
    - What makes this story significant?
    - What attributes of PEM (or specific tools and processes) contributed to this change?
    - What role did you as the user of PEM play in the process?

PEM & learning from the field

[World cafe format]

- What have you found most useful in the PEM resources (manual and modules)?

- What have you had to do (in training) beyond what is contained in the PEM resources?
- If you were to make a change or addition to the resources, what would that be?

Annex 3: Checklist for Focus Group Discussion with community group leaders

<u>Biographical information</u>

[Form will be passed around to fill in details for individuals and for groups]

<u>Views on Empowerment</u>

[give participants time to reflect either individually or in pairs, note down if they wish, then report back]

- What does 'empowerment' mean to you? [discuss translation into local language]
  - o What symbol, image, analogy or story would illustrate what you understand empowerment to mean now?
  - o Is this the same view you had of empowerment before joining your WfC group or has it changed?
  - o If your earlier view is different from the view you hold now, what symbol, imagery, analogy or story would accurately represent your earlier view?
  - o If your earlier view is different from the view you hold now, what made you change your view?

<u>'Most Significant Change' Stories</u>

[give participants time to reflect either individually or in their WfC groups, note down if they wish, and then report back]

- Tell me a 'most significant change' story that has resulted from your involvement in your WfC group.
  - o What makes this story significant?
  - o What was the exact moment of change? (e.g. when something that you had not understood before was explained to you; or when you tried something you had not tried before and learnt something new... Make the story as detailed as possible).

<u>PEM & learning from the field</u>

Have you been involved in training other people in WfC groups/community? [Questions below will only be for those who have been ToTs]

- What materials/tools have you used for such training?
- What materials/tools have you found most useful in such training?
- Among the materials/tools, which ones do people appear to respond to or to understand the most?
- If you were to make a change or addition to the training what would that be?

WfC's approach in comparison

If you are also in a group that receives support from another organization, what would you say is the main difference between the way WfC works with you and the way that other organization works with you?
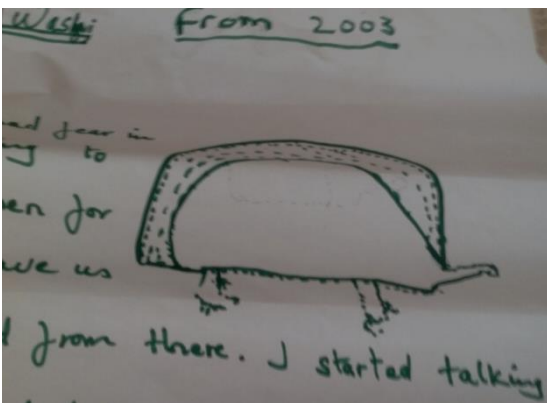
Annex 4: From Donkey to Dove
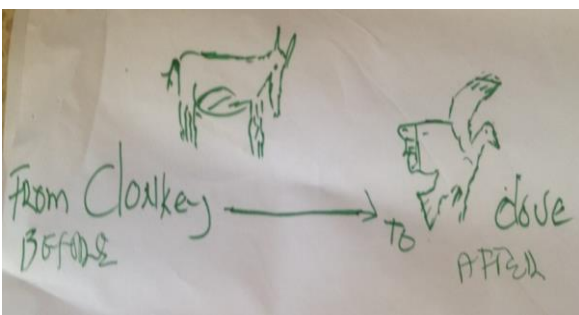
Annex 5: From Resignation to Productive Work
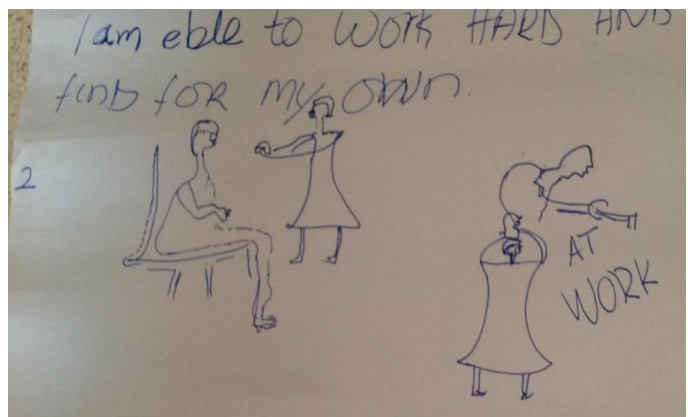
Annex 6: The tortoise shows her head

Annex 7: I stopped beating my wife