Seeking strength from within

The quest for a methodology of endogenous development

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Cover photo: Kalavathi with her daughter at her organically farmed rice field, southern India where she conserves a popular traditional rice variety called 'Rajmudi'. Kalavathi, 140 other individual farmers and 10 farmer groups market their rice and other food products through a producer company called 'Sahaja Organics', inspired amongst others by the endogenous development methodology of the COMPAS Network.
Photo: Krishna Prasad, Sahaja Organics, www.sahajasamrudha.org.

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We hope that this book will make a positive contribution to continuing the quest for endogenous development methodology. Above all, we believe that the processes described will serve to enhance the inner strength of other communities, and convince new local institutions to engage in endogenous development and continue this important work.

Marc P. Lammerink and Sara van Otterloo-Butler

Introduction

Marc P. Lammerink and Sara van Otterloo-Butler

Few books have been written on participatory approaches that integrate local knowledge into development interventions (endogenous development), and which present the experiences of organisations in so many different countries and under such differing circumstances. The purpose of this book is to make available to a wider audience, descriptions of how individuals and organisations go about their work of supporting endogenous development. The experiences recorded, from Sri Lanka, Ghana, Bolivia, India, Peru and Ethiopia, are the result of ten years or more of working in the area, gradually building understanding of the processes involved. Pulling together this wealth of experience has been an arduous task that has taken more than a year; in retrospect though this is a short amount of time compared with the period of observation, practice, experimenting and reflection undergone by the organisations themselves.

The book presents the critical reflections and learning culled from the different experiences and, as such, represents a step towards disseminating the approaches that have been developed in the last ten years in the work of the COMPAS endogenous development programme. Rather than just compiling a range of articles from authors of different nationalities, we have also attempted to distil what makes endogenous development different from other approaches to development (participatory or otherwise), differentiating without generalising too much. Although the experiences described here have been all inspired by a comparable philosophy, the process and phases of implementation differ and are specific to each context.

In a sense therefore, we present a comparative school of participatory approaches related to endogenous development in community development, health, education, and eco-agriculture. Comparison between different worlds and areas of attention makes the case for endogenous development approaches even stronger. The book presents methodologies developed and being used by organisations involved in field programmes of the COMPAS network. We hope that the contributions will inspire and encourage readers to try them out and to adapt aspects from the different endogenous development approaches to their own work situation.

The experiences derived from these different contexts provide sufficient authority to embark on a more overarching systematisation of an approach that integrates local knowledge and worldviews into development interventions. The concluding chapter takes a step in this direction.

Endogenous development and wellbeing approaches

Endogenous development as an approach evolved out of the school of action research and participatory approaches in agriculture and natural resource management, starting in the late 1980s. During the course of the 1990s, the importance of participatory approaches and of integrating local knowledge into development interventions became broadly recognised. However in practice, many of the approaches that had been

developed experienced difficulties in overcoming an implicit 'materialistic' bias, where the focus was on physical and economic development. Since it started in 1998, the COMPAS network has compared and supported endogenous development efforts. Endogenous development seeks to overcome a materialistic bias by making peoples' worldviews and livelihood strategies the starting point for development. Many of these worldviews and livelihood strategies reflect notions of sustainable development as a balance between material, social and spiritual wellbeing. The three dimensions are seen as inseparable.

Thus, the concept of worldviews became central in the COMPAS network: 'real life' is considered as being when communities have capacities to aspire to achieve a balance between material, social and spiritual wellbeing. The main difference between endogenous development and other participatory approaches is thus the consideration of spiritual or cultural aspects in the development process, in addition to the ecological, social and economic aspects. The aim of endogenous development – development from within – is to empower local communities to take control of their own development process in order to achieve their material, social and spiritual wellbeing aspirations.

Endogenous development is mainly based on local strategies, values, institutions and resources. Therefore priorities, needs and criteria for development will differ in each community and may not always be the same as those of the development worker. Key concepts within endogenous development are: local control of the development process; taking cultural values seriously; finding a balance between local and external resources; and appreciating worldviews.

Let us take a closer look at the concept of wellbeing (*vivir bien* in Spanish), which is receiving increased attention in development cooperation[2]. Gross National Happiness approaches focus on national levels and the Wellbeing in Developing Countries (WeD) programme has been developed by researchers, academics and policy makers. In contrast, the niche of COMPAS partner organisations is showing how (and why) worldviews and wellbeing can be incorporated in concrete field programmes. According to the WeD programme, international development needs a practical concept of wellbeing if it is to reach and go beyond the Millennium Development Goals to confront the major and interlinked challenges of poverty, conflict and sustainability. But how can development organisations support the wellbeing aspirations of communities they work with? This has been a constant challenge for the organisations of the COMPAS network too.

How field workers can – learn to – deal with the different dimensions of wellbeing (material, social and spiritual) as expressed in worldviews is the key to endogenous development and therefore the key to the COMPAS network as a whole. Experience had been gained in field programmes, but these experiences had not been well documented as operational approaches and methodological tools, and thus a systematic operational approach with clear steps was lacking. This book tries to fill this gap.

Although the question of learning about endogenous development was addressed in the earlier COMPAS publication 'Learning Endogenous Development –

[2] Examples are the Millennium Ecosystem Assessment, economics of happiness as in Gross National Happiness approaches in Buddhist countries, the Wellbeing in Developing Countries (WeD) as coordinated by the university of Bath, UK, and also the COMPAS network.

Building on Bio-cultural diversity' (Practical Action 2007), the book did not cover methodological aspects. The book is a collection of case studies illustrating the principles of endogenous development and ways of learning, such as appreciating the diversity of worldviews, visioning and planning and supporting local initiatives. The current book describes how some of the principles expressed in Learning Endogenous Development have been applied. The earlier book concludes: '*Endogenous Development implies much more than learning new skills or developing new understandings. It goes beyond the use of the hands and head, and touches people's hearts. It relates to peoples' fundamental views, their basic attitudes to their fellow humans, to their religious feelings sometimes. Learning in Endogenous Development is thus about personal as much as professional development'*[3].

However challenging this might sound, participants at training events expressed time and again the need to gain more hands-on insight into operational approaches and practical tools on how-to-do endogenous development, and how to integrate the three dimensions of wellbeing – material, social and spiritual – in field programmes. Thus, systematising experiences became an important challenge in the COMPAS network to answer the 'how-to-do endogenous development' question.

Learning-by-doing endogenous development

In May 2009 we organised in Monsaraz (Portugal) the Monte Saraz write-shop for a South-South exchange between network partners. The weeklong write-shop created a space where a group of selected field workers[4] could share, confront and discuss their opinions based on mutual trust. It involved a critical engagement in the interpretation of the different experiences, and mutual and collective learning, as well as writing.

During the write-shop, experienced field workers from seven partner organisations, all involved in endogenous development projects, critically reflected on and made sense of their experience, turning the lessons they derived from the reflection into new knowledge, which now will hopefully inform a new round of practice not only in their own work, but also in that of the readers of this book.

Systematisation

The facilitators of the write-shop used a methodology called systematisation ('the act of organising something according to a system or rationale'). Systematisation as a methodology has its origins in Latin America (Oscar Jara, 1998[5]).

Systematisation refers to a process which seeks to organise information resulting from a given field programme, in order to analyze it in detail and draw lessons from it. In English it is often referred to as a documentation process, but it is more than the simple act of recording information, as it involves a process of critical

[3] The book has also been translated into Spanish by the Latin American COMPAS coordinator, AGRUCO (Bolivia): Aprendiendo el desarollo endógeno sostenible (2008).
[4] Selection of the fieldworkers was based on previous prepared materials and developed tools such as manuals, curricula, scenarios for making the endogenous development approach operational in different thematic areas and in different countries or continents.
[5] Jara, O. (1998), Para sistematizar experiencias, ALFORJA, San Jose, Costa Rica

reconstruction and interpretation of the experiences gained in the field programmes of the COMPAS network. The facilitators challenged the participants to explain the logic of their different programmes, the external and internal factors that influenced their experiences and why particular results emerged. This thoughtful process of systematisation encouraged critical and collective reflection on how each experience evolved. It strengthened the abilities, skills and capacities of the field workers present to look at the evolution of their experience and identify steps, lessons and insights for future interventions.

During the write-shop the facilitator and two supporting editors helped the participants to organise the information gathered from their field programmes: analyzing the rationale for the choices made, how and why different factors intervened to shape or change the interventions over time and what processes of change emerged from the experiences. Furthermore, we reflected on the operational approaches and the process of steps and phases, and the methods developed (how-to-do endogenous development). We also reflected on the change process each field worker underwent: what made them become involved in endogenous development work, trying to understand the personal development and learning related to endogenous development. This information has been included in the section on the contributors. At the end of a week of intensive talking, discussion and writing we had six draft contributions. Everyone then returned to their own continent, and the editors continued a long-distance dialogue with the contributors to shape their accounts into the end result here.

Special attention has been devoted to tools that the organisations use to address the different dimensions of wellbeing and their interrelations: material, social and spiritual. During the process of writing we encouraged the participants to describe their operational approaches in a way that would help other NGOs interested in the endogenous development approach to be able to apply them in their own contexts, in particular in their application of a participatory endogenous development approach. Hopefully, the resulting book at least partially fills this gap. However incomplete, it represents the state-of-the-art of doing endogenous development in the COMPAS programme.

The users of this book

Building on its predecessor, Learning Endogenous Development, this book is intended for staff of community-based organisations, development organisations and projects, who work directly with communities, farmers and groups. They may work within government- or non-government organisations and have extension, research or general community development tasks. The focus of their work may be agriculture and land use, education, health or nature conservation, or may be related to livelihood issues. As part of their work, however, these practitioners all interact frequently with communities and are interested to learn how their interaction can be more effective and lead to truly sustainable development at the local level.

Structure of the book

This is a how-to-do book for people who want to understand methods used in going about endogenous development. It is not a manual, however. It is composed of contributions that highlight the steps and phases of operational approaches in different fields of endogenous development efforts, and in different contexts in Asia, Africa and Latin America. The methodologies are presented in the first six chapters. Chapters 1 and 2 describe a broader community approach, followed by chapters 3, 4 and 5, which outline approaches that have been developed in specific areas of work: agro-ecology, health and education. While it is not a methodological description in the strict sense, Chapter 6 is devoted to an interesting case study from Ethiopia, contributed by a member of the Endogenous Livestock Development network. Chapter 7 returns to the contributions of the write-shop participants and considers some global lessons and methodological issues raised.

The chapters

FIOH's social mobilisation facilitates community change

The Sri Lankan NGO Future in our Hands (FIOH) has over 20 years of community development experience in Uva province in Sri Lanka, working with smallholder farmers engaged in dry-land and irrigated rice farming. During this time FIOH has developed a participatory methodology, called the social mobilisation approach, for facilitating change in the communities. At the heart of this approach lies the concept that individuals in a society cannot make a change in their lives unless they have an intrinsic understanding of their own situation. Work in the community starts with the training of a social mobiliser. Subsequently, local-level organisations are strengthened to function independently. Under the COMPAS programme, FIOH started to consciously include a more holistic approach, whereby the community development process is conceived of as a combination of the material, social and spiritual aspects that encompass the genuine aspirations of the community members.

From the inside out: CIKOD's community organisational development

The Centre of Indigenous Knowledge and Organisational Development (CIKOD) is based in Accra, Ghana. CIKOD developed the Community Organisational Development (COD) process, which enables communities to marshal both indigenous and external resources using their traditional leadership and organisational systems for their own development initiatives. COD was developed from the principles of endogenous development – promoting development that involves creatively using all the indigenous potentials of a community but not excluding appropriate external resources. The methods used are based on working with and through the traditional authorities and indigenous institutions, their organisational practices and the natural resources available to them. This enhances the ownership of the development process. However, CIKOD realises that when engaging with traditional authorities one must be aware of the risks and challenges inherent in this relationship.

Agruco strengthens communities' self-esteem and identity

Agro-Ecología Universidad Cochabamba (AGRUCO) is a university-based organisation that has been working since 1999 on strengthening community-based organisation in agro-ecological management of the land in Bolivia. Two field workers, a sociologist and an agronomist, have worked with 350 families in seven indigenous communities, implementing a sustainable endogenous development approach in the Jatun Mayu basin. In AGRUCO's experience the most effective formula for overcoming problems that these rural people faced was to revalidate their own knowledge, to reaffirm their own cultural identity and to begin a real two-way dialogue with outsiders where neither party submits to or is subjugated by the other. The field workers learned that increasing self-esteem turned out to the most valuable outcome achieved in the development process. 'Looking back we have come to understand that endogenous knowledge and organisational strength are like a seed in well-fertilised soil: they form the foundation upon which the development of other productive and social activities is built.'

FRLHT revives local health traditions

The Foundation for the Revitalisation of Local Health Traditions (FRLHT), based in Bangalore, India, designs and implements participatory endogenous development methods to promote local health knowledge and sustain the natural resource base. These include Documentation and Assessment of Local Health Traditions (DALHT) in human health as well as ethno-veterinary health practices. The Home Herbal Garden programme helps to promote and mainstream positively assessed traditional remedies, and in Kashaya Camps decoctions (*kashayas*) are made from herbs that help prevent diseases such as malaria. In India many local health practices are disappearing due to lack of social and policy support. Moreover, the interest in learning and practising local health traditions is waning, especially in rural areas. FRLHT's approach has been successful because it applies local knowledge and resources for local needs. The codified medical traditions and non-codified local health traditions in India share a common worldview, and this helps to promote endogenous solutions to health problems on a large scale – something a country as large as India desperately needs.

Ceprosi creates caring and friendly schools

The Peruvian NGO Centre for the Promotion of Intercultural Wisdom (CEPROSI) is engaged in promoting local wellbeing through secondary education in the Andean highlands of Cusco. Since 2001 CEPROSI has been promoting intercultural dialogue in both primary and secondary education in the area. The organisation works on curriculum development in primary and secondary education to meet the wishes of the indigenous parents. They have developed a successful model of curriculum change based on the 'learn to live life' concept.

PARIMA reintroduces controlled burning, a traditional range management practice

The Pastoral Risk Management programme PARIMA is the coordinating member of the Endogenous Livestock Development (ELD) Network in Ethiopia. PARIMA works with the Borana leaders and pastoral people on the Borana Plateau in Ethiopia to revive indigenous range management practices. This contribution outlines the steps taken to revitalise the use of fire as a range management practice in the Borana rangelands in southern Ethiopia. Controlled burning of bush vegetation was a long-standing practice in the Borana pastoral system before its ban in the late 1970s under the national forest and wildlife conservation strategy of Ethiopia. According to Borana elders, the impacts of the fire ban have been disastrous: the subsequent bush invasion has killed grass (thus reducing domestic animal productivity and the amount of wild grazing animals) and substantially increased livestock loss to predators. Controlled burning has now been reintroduced following a participatory process conducted according to endogenous development principles.

Conclusion: the quest for a methodology of endogenous development

The final chapter of the book reflects on the methods and approaches described in chapters 1 to 6, and takes the process of systematisation a step further. It is clear that the underpinnings of endogenous development do not lend themselves to sweeping generalisations or rigid prescriptions of how to proceed. Nevertheless, patterns emerge and so a five-stage approach for strengthening endogenous development is proposed:

- Diagnosing and identifying local knowledge and practices
- Identifying and testing indigenous knowledge and practices
- Organising towards self-management and local leadership
- Sustaining and self-reliance
- Movement building through advocacy and linking

The editors regard this book as a starting point rather than the final statement on methodologies that integrate local knowledge into development interventions. We hope it will inspire readers to reflect critically on their work and to develop their own approaches and methodologies, building on their experiences, and to share these with colleagues. We would very much appreciate your feedback so that we can continue to learn together.

The contributors

During the write-shop that was the start of shaping the COMPAS partners' experiences into this book, the facilitators asked the participants whether there had been a particular moment when they recognised the value or strength of using an endogenous development approach. We include these short personal accounts from each of the main contributors to this book.

K.A.J. Kahandawa, works for FIOH, and is coordinator of COMPAS Sri Lanka

I attended a meeting of traditional medical practitioners in Mahiyangana, Badulla district. There I saw an old man performing a ritual and blessing a woman who was ill. I tried to talk to him afterwards but he was not interested. I persisted, and finally he explained that he would not talk about what he did in public, but if I was interested I could visit him at home.

The man lived far away in Moneragala, but I managed to go the following weekend. At first he was surprised that I had come, but he treated me as a special guest and I spent the whole day with him discussing his work. The man had a vast knowledge of medicine, herbs, snakebite treatments, bone fractures and more. He talked at length and I listened patiently. The more questions I asked, the more he talked. He described how he treated patients, gave me recipes for snakebite treatments, and showed me his collection of treatment methods and prescriptions for various ailments, written on *ola* (palm) leaves. He also explained how rituals, mantras, deities and meditation are used to treat different illnesses. He had rational, convincing explanations for everything he did.

In the afternoon a young boy came to the house and showed great respect towards the old man. This boy had had a motorcycle accident in which his leg was badly damaged. In hospital the doctors said it would have to be amputated to save his life. His parents objected, to which the doctor responded that he would not be held responsible if the boy were to die. With great difficulty the parents brought their son to this healer. The healer took him in and kept him at his house for more than two months, after which the boy was able to walk again. The healer explained his success, saying that doctors do not have respect for human life as healers do: healing is not only about giving medicine, but the spiritual aspects are also important in this work.

I left the healer's house in the evening, and gave a lift to a few youngsters on the road. As we drove along, one of them asked what I had been doing the whole day in the man's house. I told them about my discussions with the healer and that I had learned a lot. After listening, one of the boys said, 'And we thought that this man was half mad!'

The way this rich traditional knowledge is regarded made a deep impression on me. I wanted to understand more about this man and the work he does. I developed great respect for him and I still maintain a close relationship with him to this day.

Bern Guri, founder and director of CIKOD, Ghana

I started my working life as a facilitator of agriculture extension in 1985. I started as a strong proponent of modernisation of agriculture as a way of improving rural life with a serious interest in intermediate technology development. After five years I became disillusioned because the adoption rate was too low, it had serious adverse effects on rural people's health and did not seem to fit into rural lifestyles. Together with some colleagues we embarked on promoting the concept of Low External Input and Sustainable Agriculture (LEISA) with inspiration from the Dutch NGO ILEIA.

In 1993, together with some colleagues, I founded the Ecumenical Association for Sustainable Agriculture and Rural Development to facilitate the spread of LEISA in Ghana. I saw Participatory Technology Development (PTD) as the way forward and vigorously participated in the development of the process. Farmers were enthusiastic about PTD, but the technologies they developed did not stand the test of time. My disappointment led me to reflect on development from the perspective of the communities I worked in. Then I realised that **in the worldviews of Ghanaians, spirituality and social status are considered equally as important for wellbeing as economic or material gain.** It was then I started to understand that their technologies and development strategies have survived the test of time because they are intrinsically linked to their local environment and their worldviews. COMPAS' proposition of endogenous development as an approach that starts from the internal resources as well as the worldviews of the community appealed to me.

After strenuous efforts to get members of my sustainable agriculture and rural development network to accept the fact that indigenous knowledge and farmers' worldviews are the cornerstone for any progress in sustainable development, I founded CIKOD to be able to promote development that builds on people's internal resources – material resources, social institutions and organisations, and their worldviews.

Cesar Escobar, works for AGRUCO in Bolivia, and is COMPAS coordinator for Latin America

I found the conventional approach to development unsatisfactory, as it often relied on externally imposed priorities and saw modernisation as the solution to problems such as food security, which it was said was due to population growth. All too soon the cracks started to appear, and the problems that had arisen as a result of this approach became clear: a decline in natural resources and social and cultural disjointedness/disruption.

In the face of this, more sustainable and participatory processes started to evolve, but still within the framework of modernisation. I became convinced that it was important to search for development based on local conceptions of development. This led me to ideas like 'vivir bien', where people were saying things like: 'yes, we want food security, yes we want the benefits of modern life, but without losing our own cultural identity (cosmovision)'.

This led me to the idea that external actors could support local processes in a participatory way, based on the notion of complementarity. This means that all innovations and external experiences should be framed within the local worldviews.

These are not processes of cultural archaeology, but are about finding solutions to practical problems faced by local people today: having enough to eat and managing natural resources in a sustainable way. In my view the key themes are organisational strengthening, and preparing external actors to be culturally sensitive and work on the basis of equality.

Hariramamurthi Govindaswamy, heads the Centre for Local Health Traditions at the Institute of Ayurveda and Integrative Medicine (IAIM), Bangalore, India

It was a personal encounter with a healer, Narayanamurthy, in Shimoga District of Karnataka State in 1995 that convinced me that 'development from within' is feasible. Narayanamurthy is a farmer-cum-healer who provides single plant-based remedies to the needy. On my first visit to this healer, I met with a priest from Gokarna who had come to present the healer with traditional gifts of coconut, bananas and new clothes in thanks for saving his voice, enabling him to continue to sing in praise of God. The priest was a retired schoolteacher and had performed all his duties towards his family. He had visited one of the best and modern hospitals in a nearby town for treatment of throat cancer. On being advised by the doctors to undergo a surgical intervention, he sought to know whether he would be able to continue to recite the verses in praise of God, which was his main pursuit in life. The doctors responded that they could not guarantee that he would retain his voice after the surgery. He heard about Narayanamurthy from the doctors and sought treatment from the healer, who told him that his treatment would not involve surgery on the throat. Hence he did not have to fear losing his voice and he would be able to continue to sing in praise of God.

Narayanamurthy treats two to three hundred patients on Thursdays and Sundays every week. Buses that ply through his village empty with patients who stand in a queue for a few hours to receive their medicine from the healer. He listens to each patient and gives a single raw drug, such as a root, leaf, or bark. He explains to the patient how to take the medicine and takes no money for his services. He directs the patients to put their money in a *hundi* box, which is kept in a corner, and the proceeds are given to the temple of his Family God.

When I met Narayanamurthy, I enquired why he does not charge money for his services. He said that the medicine he gives comes to him free of cost, from natural habitats around his dwelling. All the knowledge and skills that he acquired also came to him from his teacher free of cost. He added that since God has given him everything to meet his and family's needs, why would he need money from others to take care of him and his family?

This is one of the many encounters that I have had with healers, farmers and forest dwellers in India, which have convinced me that local knowledge, skills and resources can take care of people's basic needs for food, shelter, livelihood and health.

Elena Pardo Castillo, founder and director of CEPROSI, Peru

Bilingual, inter-cultural education goes back over 20 years in Peru, and has been subjected to the ideas of many different governments. This kind of education is

directed at children in rural communities and the focus was originally on learning and language development, rather than the worldview of the communities.

I worked for eight years on implementing the government's policy. It was an exciting time and I worked on curriculum design and developing materials for 600 schools. A number of years ago, responsibility for the work transferred to the Regional Director in Cusco, and we thought that our work was done. I continued to work in the same field, but at a certain point I noticed that teachers were not using the books, manuals and information sheets we had developed. Nor were they using the methods and techniques we had trained them in. We had also set up orchards, farms and greenhouses, but nothing remained of these: fields had been abandoned or rented out and used to grow hay to feed cattle. I started to wonder what had happened. All these plans we had put so much effort into implementing seemed to mean so little to the teachers, pupils and parents. Where had we gone wrong? What had happened to the regional education directors that we had transferred power to?

Then in 2001, the results of a countrywide study called *How children in the Andes learn* were published. One of the conclusions was that indigenous children following bilingual education did not learn to read and write sufficiently. Because the mother tongue of indigenous children is Quechua, it was very difficult and alienating for them to first learn to read and write in Spanish – the official language at school. Moreover, many of the teachers did not speak the native Quechua language. Contributing to the feeling of alienation was the fact that most educational material presented a reality of a middle-class urban context, totally different from the rural highland world of most children.

I took the research outcomes of the study as a starting point to develop an alternative programme for inter-cultural education. CEPROSI was established, initially with very little funding. In 2002 we started with two schools and five interested schoolteachers, which I selected using my 'intuition'. The main challenges in the beginning were: how to develop a different teaching-learning process? What methodology to use? How to plan a different curriculum for primary education? How to implement it? How to train the teachers? And of course: where to start?
We started by talking to the parents, asking what they wanted their children to learn. Moreover, conscious efforts were made to actively involve the parents in the learning process throughout the programme, for example by including their daily activities in the school programme. *Learning by doing* became the amalgam of the teaching learning process. Children became enthusiastic performers of their own culture, thus enforcing their self-esteem and creativity.

Years went by, and as I searched for answers to these questions I moved into a new phase, continuing to implement the policy but now including bigger challenges like endogenous development within schools and making education truly inter-cultural, as I describe in this book.

Getachew Gebru, livestock expert with PARIMA and coordinator of the ELD Network in Ethiopia

I was trained to understand that development is something that comes from outside. I started work at an institution of higher learning where unidirectional knowledge transfer was the key driver, so this was what I taught my students too. 'You know

what the community needs.' So communities were on the receiving end. The assumption was that the communities themselves have nothing to give. Over the years, however, it became clear that this was a futile exercise. There was something wrong in this, I realised, while doing my PhD work in an agro-pastoral system in Ethiopia, which brought me in direct contact with livestock keepers and also opened an opportunity for me to interact with them. They had a tremendous amount to offer, and had a broader all-encompassing view of their environment and their wealth.

During my years as a senior lecturer at a university, understanding of how communities perceive development was a missing link, but I never realised that. Through time and by interacting with communities, I have really learned that a wealth of knowledge exists within these communities. This knowledge base is also dynamic, and through the years it has evolved to address the varied concerns of the communities. It is holistic in that it considers the social, human, natural as well spiritual aspects. And these different aspects all feed into the worldview of the communities.

I came in touch with practitioners of endogenous development and I had to learn and unlearn. Then I accepted an offer to work in a programme that supports development directions that emanate from the community according the following philosophy: appreciation of endogenous development practices, and identifying opportunities to integrate this knowledge and local resources with appropriate outside input, based on pastoral communities' own culture and worldview. I learnt more about the philosophy more after I joined the Endogenous Livestock Development network. I was also motivated greatly to find so many people involved, as well as activities along these lines globally. It is an on-going process of learning…

Marc P. Lammerink, co-founder and director of FMD Consultants, the Netherlands

After finishing my studies in sociological economics in 1974, I started working as a junior consultant in an Organisation Advisory Group. My main activity was action research in the Dutch brick industry. The project focused on improving the quality of working conditions in this sector. Through a kind of Rapid Industrial Appraisal, using participant observation, semi-structured interviewing, different visual aids (maps and diagrams) and group sessions, I made a thorough analysis of shop-floor conditions in fifteen brick factories. The sub-standard conditions I saw in some of them made a big impression on me, as did the human, technical and economic mistakes that many managers made by not taking workers into account, when seeking higher output. I identified some relatively progressive managers from various factories, who had experienced that a higher quality of workers' participation was essential for proper functioning of their factory. During a number of group sessions we developed an action profile for humanising both the working conditions and management style. Their experiences in the effective integration of the shop floor into the total production organisation were revealed in a mutual-learning inquiry. Practitioners became participants in the research process and the subsequent training process.

Nevertheless, some owners decided to halt the inquiry process. They did not want unprecedented situations, as they were worried they were not prepared to cope. This unexpected termination of the project made it clear to me the risks and disadvantages of a participatory approach organised *'from above'*.

I decided to quit the consultancy firm and to start working *'from below'*. Thirty-five years of participatory action research in many different fields followed, mostly working together with grassroots organisations: local neighbourhood groups, farmers' cooperatives, water committees and fisherman, to name a few. I came to understand the strength of bringing about awareness and change by actively involving people in generating self-knowledge about their own history and conditions for action. I also saw leaders understand the need to share their acquired expertise with the rank and file, and to remain responsive to the feelings and needs of the farmers and common people, whom they are supposed to represent. My role changed to that of a convener, a colleague, a catalyst and sometimes a consultant, who brought in new ideas. I started to develop an approach for supporting local initiatives.

Only recently did I really come to understand the importance of working with *'strength from within'*. The COMPAS Latin American partners were on an exchange visit in a Quechua village, where CEPROSI was involved. During the ceremony organised by some spiritual leaders from Guatemala, which was attended by the whole village, the stick of power was handed over to the village leader. I could see on his face the burden of receiving that power. Some days later he resigned. He happened to be an Adventist and was not very supportive of enhancing local traditions. He was shocked that day by the power of indigenous traditions and understood he was trying to introduce alien values into the community. Such awareness would never have been possible without the strength of spiritual values from within.

Sara van Otterloo-Butler, works as an editor based in the Netherlands

I am not a development practitioner but have been lucky enough to work with many as an editor and translator. I am even less a practitioner of endogenous development, so have no account of a moment when I suddenly understood what the key to it was. Working with COMPAS has, however, woven many strands of my life together: living with and learning about other cultures as an anthropologist, small-scale organic growing done with my father, yoga learned from my mother. I have learned a lot from all the partners of the COMPAS programme, and these various threads came together, when, after a long day in the field in Kancheepuram in Tamil Nadu, visiting farmers and agriculturalists working with villagers, I went to introduce myself to Balu, at that time COMPAS coordinator in India and his wife Viji, in the busy city of Chennai. I was in India doing yoga at the time, but little did I know that they not only were devotees, but that they had followed the same tradition for many years. Sometimes I rejoice at how small the world is. The approach that COMPAS has pioneered in supporting endogenous development provides a strong foundation for enhancing the respect that we as humans have for our fellow inhabitants on this planet, and above all for making the voice of those who are not often heard just a little bit louder. I am grateful for having had the opportunity to work with such caring and interesting people – it has certainly contributed to my own inner strength.

Sri Lanka

FIOH's social mobilisation approach to facilitating change

K.A.J. Kahandawa

Background

A number of local organisations in Sri Lanka have been implementing programmes for supporting endogenous development for some 5-8 years. Their experiences include revitalisation efforts in agriculture, ethno-veterinary practices and Vaasthu (traditional house building and home environment). In order to facilitate endogenous development, these organisations have engaged in a variety of participatory interventions. The purpose of this contribution is to systematise the operational approach that the organisation Future in Our Hands (FIOH) uses to support endogenous development in its communities.

FIOH has over 20 years of community development experience. During this time it has perfected the social mobilisation approach, an intervention strategy it uses in the communities it works with. This approach has always been highly participatory and over the years has become accepted by the communities as one of their own development strategies. FIOH has further improved the social mobilisation approach to include endogenous development aspects.

An indicator of any development strategy is its long-term sustainability once the facilitating agency (often an NGO) is phased out. In many of the locations where it works, FIOH has been able to develop the capacity of the local-level organisations to function independently. Hence the FIOH approach to promoting endogenous development has proven its sustainability.

FIOH implements an integrated development programme in the dry and intermediate zones of Uva province in Sri Lanka. The target group consists mainly of smallholder farmers engaged in both dry-land and irrigated rice farming.

With the promotion of green revolution farming practices and subsidising of hybrid seed varieties, fertiliser and chemical inputs, farmers gradually moved away from traditional farming practices. Traditional seed varieties were lost. The high external input agriculture gave quick returns in the beginning. But as time passed, soil fertility declined substantially and the cost of external inputs increased, turning the new practices into high-cost low-return agriculture. After 40 years of green revolution, the farmers now face a severe crisis in agriculture. There are no more subsidies and farming has become an uneconomic venture.

FIOH works in these villages in partnership with the local community through the intervention strategy of social mobilisation.

Social mobilisation (SM) is a development intervention philosophy. At the heart of this philosophy lies the concept that it is more difficult for individuals in a society to make a change in their lives unless they have confronted the reality of their situation

and understand it from a holistic perspective. This means their knowledge, attitudes and behaviour can only be changed through an intrinsic understanding of their own situation. Social mobilisation can bring about such a change. Social mobilisation is a dynamic personal/individual, social, cultural and political process that is complex in nature.

Steps in FIOH's intervention strategy

FIOH's goal is endogenous development in the communities where it works – i.e. a development process that takes place according to the worldviews and needs of the community. It initiates participatory development methods with the intention of harnessing the active involvement of beneficiaries from the stage of problem identification to sharing the benefits. FIOH uses social mobilisers (SMM) as change agents to achieve this goal. The SMM is the crucial player who initiates the endogenous development process, so selection and training of the SMM is of great importance.

1. Identification of communities

The first step of the methodology is the identification and selection of communities that need development intervention. FIOH selects the communities based on *pre-determined criteria*. The criteria are the remoteness of the villages, no notable development intervention by the government or an NGO, majority of the community members below poverty line (as identified by the government under its Poverty Alleviation programme), and the potential for sustainable agriculture and other livelihood development. One additional criterion is that FIOH works with a cluster of villages, so villages that are close together are selected. Such a cluster usually consists of around 10 villages. The selection is done at FIOH level.

2. Selection and training of Social Mobiliser

Once FIOH decides to work in a particular community, the second step is to select the social mobiliser. The selection starts by placing public advertisements and/or considering recommendations from other field staff in the organisation. The FIOH coordinator interviews the candidate and contacts different sources to investigate the candidate's suitability. Younger persons are preferred. They need not have high educational qualifications but should have fairly good reading and writing ability. One of the important qualities of the prospective SMM is the person's acceptability to the communities in which she or he will perform. If possible, the mobiliser is selected from the village. Where there is no suitable candidate in the particular village, the SMM can be selected from a nearby village.

Once selected, the mobiliser receives training. Initial training of social mobilisers generally lasts six months. The training is conducted in such a way that during the training programme itself the mobiliser starts interaction with the community. The training process involves six training modules. (FIOH has a detailed curriculum for this purpose, and only the major steps are described here.)

The selected mobilisers are trained in small groups of 10-15 participants. The training starts with five days in the classroom, during which the trainees are

introduced to the general skills and attitude requirements for promoting an endogenous development process in the community. The most important skills at this stage are: building rapport with the community with respect to their knowledge and culture, and conducting interviews/discussions. After this initial training the mobilisers receive additional training on how to conduct interviews, use Participatory Rural Appraisal (PRA) and visual tools for discussions, and keeping records of the discussions.

The SMMs then go to the community for a 15-20 day stay. During this period, they meet and discuss with the community members in the village and gather basic information about the community's social, cultural, religious/spiritual background and economy.

The SMMs then return for another classroom session of five days, where they share experiences with fellow SMMs and the trainer. The trainer helps them to analyse and understand the information they bring back from the community. Apart from what the SMMs learn by living within the village, they gradually build up additional skills and knowledge as the trainer familiarises them with a variety of teaching/learning methods in each classroom session. These methods provide the SMMs with further probing skills so that they can elicit a more detailed and holistic picture of the lives of people in the community. Having reflected and acquired new knowledge from the trainer, the SMMs go back to the community again with the assignment of understanding more about the lives of the community members.

This process of being with the community and coming back to classroom for reflection is repeated six times, ideally over a period of six months. In each session the facilitator provides the SMM with guidance on how to live in the community and initiate analytical discussions with individual community members in order to help them understand their situation better. The SMM also receives training on how to use participatory tools for deeper analysis and understanding of the community's situation. Mapping is one such example. Maps are made with the participation of the community members. At the initial stage this map is basically a resource map, which the mobiliser uses to represent the baseline situation. Apart from collecting geographical information, mapping is also done to collect social information.

The kind of information the mobiliser collects during the six-month period includes:

- history of the village and trends identified
- land and resource distribution in the village
- utilisation patterns of these resources and related problems
- different organisations in and outside the village
- formal and informal social institutions that are vital in village life (caste, religion, festivals, rituals and beliefs)
- family income and expenditure patterns
- savings and credit
- indebtedness and dependencies

The information that has been collected in the beginning is further elaborated and analysed each time the mobiliser comes to the classroom training. This information does not differ much from conventional analyses, but the discussions initiated by the social mobiliser make the difference, as the example in the box shows. As the

mobiliser continues to elicit information, s/he facilitates understanding of the spiritual dimension too.

Box 1. Social mobilisers initiate critical reflection and discussion
In conventional information collection, the informant would mention that they do not have any savings. Additionally they might also mention that they are indebted to local moneylenders, an indication of their inability to save. But when the SMM initiates the discussion, she or he discusses about unnecessary expenditures like smoking, betel chewing, buying things from the shops that they can easily produce themselves, and not using available land efficiently. In this way the SMM does not accept inability to save as a de facto status. An SMM will challenge such a statement in order to initiate critical discussion.

The objective of the training strategy is to develop a change of attitude in the mobiliser so that she or he comes to understand and appreciate the worldview of the community. Worldviews vary from community to community, and therefore they cannot be explained by an outsider to the mobiliser. So each time an SMM spends time in the community, their understanding is strengthened by the community members. The trainer has the task of providing the necessary skills and tools to make this more effective. In short, the trainer provides the tools and it is the social mobiliser who comes to mutually understand the worldview of the community in which she or he will continue, facilitating and supporting the community's development initiatives.

3. Social mobilisation in group/organisation formation

During the process in which the social mobiliser interacts with the community as part of the training, the community members and the SMM identify the areas where intervention is required to be able to move towards their wellbeing aspirations. The SMM is trained not to impose external views about wellbeing onto community members. His/her role is to facilitate discussions so that the community members understand and define their own wellbeing aspirations. SMM uses discussions and appropriate PRA tools for visualisation and deeper analysis. Many communities explain wellbeing in economic terms. At the same time there is a tendency to accept things as they are and not to question why or to seek the root causes of problems. But when the discussions are facilitated towards looking at the situation in a holistic perspective, the community members start analysing things differently and start to seek a deeper understanding of their realities. SMMs facilitate here, analysing the present situation and the root causes of the situation and eliciting possible actions to overcome them. By analysing their situation with SMMs, community members may come to understand, for example, that an increase in income might not bring the wellbeing they aspire to, as they also understand wellbeing in terms of social and spiritual dimensions

Extensive discussion and analysis eventually leads to action. As the SMM facilitates deeper and deeper understanding together with the community, members of the community start to feel the need for taking action in order to overcome the unfavourable situations they are in. We indicate below the typical chronological order of the actions that take place.

1. *Revitalising traditional collective activities*
   During the latter part of the training the SMM facilitates the community members so that they start to revitalise traditional collective activities in all aspects of their daily life. One example is *attam* (a labour sharing/exchange system). This is a traditional practice for labour sharing in agriculture that existed in the villages before hiring of labour was introduced. During the cultivation season, when labour was in short supply, all the farmers got together and worked each other's paddy lands. This labour sharing system died out during the green revolution when chemicals and machines started to be promoted and used. The SMM initiates discussion about the useful institutions that existed in the past and facilitates so that the community members analyse positive aspects of these. The SMM raises the questions about the poverty trap and how to get out of it. She or he also facilitates discussion about individual versus collective action as ways of getting out of poverty trap. As a result of this dialogue, the community sees the advantages of the traditional system in terms of re-kindling the collective spirit. Through this type of activity individuals become convinced that the way out of the poverty trap is through collective effort. The SMM then facilitates a process through which like-minded community members form into small groups of 5-10 people. The decision to be in a particular group is made by the community members themselves. The criteria include living in close vicinity, equal social economic status and the willingness to be in the same group.

2. *Initiating collective activities*
   Once groups have been formed, many collective activities are initiated in order to cement the group feeling. Weekly meetings are held and each household takes turns to host them. The responsibilities of record keeping are shared so that consultation and collective feeling are strengthened. The mobiliser initiates discussions at each meeting so that issues are discussed in relation to the material, social and spiritual aspects.

3. *Facilitating saving and credit*
   As a crucial step of working together, and also as a way of finding a remedy for indebtedness, methods of saving and credit are facilitated. The community members normally express that they are unable to save because they are poor. But the mobiliser facilitates traditional savings methods such as saving in kind. These are used as a basis upon which further savings can be built. This generally takes the form of a group savings scheme, which further strengthens the collective feeling within the group.

4. Organisation building

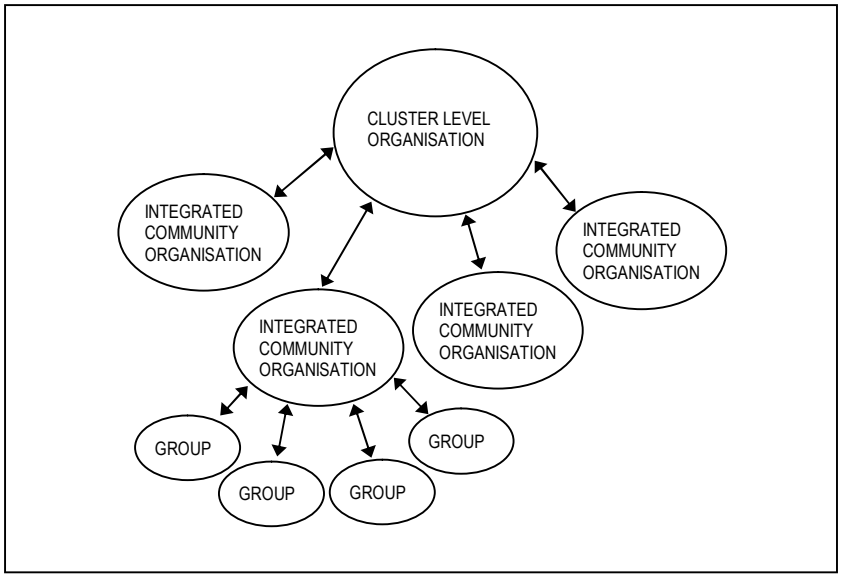
In order to facilitate the realisation of development aspirations that have been elicited by mobilised community members during the detailed planning process, FIOH has initiated the formation of organisations at different levels, shown in the diagram below.

First is the formation of groups at the very local level. Groups are mostly made up of people living close to one another, and members tend to be self selected, based

on similar interests and economic and social status. These are the groups at the bottom of the diagram. In 2009 there were 630 such groups in approximately 80 villages with a total membership of 4556 people, an average of 7-8 members in one group.

Once the groups are mature enough to work externally, (in 6-12 months) they are facilitated to become a village level organisation, named integrated community organisation (ICO). There are 57 such village-level ICOs, with an average of 11-12 groups per ICO. The groups are the members of the ICO. Groups each send two representatives to ICO meetings. These two members rotate on a yearly basis so that all the members have the opportunity to participate. A membership fee is charged for joining an ICO. The ICO also collects excess funds from member groups as deposits and uses these as a revolving fund. The ICO also mobilises funds from outside sources (credit institutions, NGOs) and provides them to members as credit for income generation activities.

How the Cluster Level Organisation is formed



Once many villages within one division (consisting of 10- 20 villages) have been mobilised, the ICOs form into a cluster level organisation (CLO). A CLO covers an administrative division. There are six CLOs in FIOH's working area. That means there are 9-10 ICOs in one CLO. The CLO is also a member-based organisation. The ICOs become members by paying a membership fee. They elect three representatives to be sent to the CLO. The board of management of CLO is made up of these ICO representatives. The main officers in the CLO (chair, secretary, and treasurer) are elected.

The objective of the CLO is to be a divisional level organisation that provides services to its members at a higher level. These include lobbying with government officers and obtaining infrastructure services for the villages. The CLO is also the planning unit that has direct contacts with FIOH and other agencies.

5. Planning process: from household level to group level

FIOH's experience of taking the planning process from household level to group level, and then on to the village and higher levels, is unique. FIOH used this planning methodology in its development interventions before its involvement with the COMPAS programme. The change that took place when FIOH joined the COMPAS programme was the adoption of the approach of looking at the community from a holistic perspective (material, social, spiritual). The planning process takes place in the following steps.

Step I Household plan

As explained above, the SMM engages in deep analytical discussions with community members. These usually take place with one family member (husband or wife), most often the person to whom the SMM has easiest access in the beginning. For example, in the areas where FIOH works, most of the men commute to work outside the village and women are the ones who are available in the household for regular discussions. These discussions continue at individual level even after groups have been formed. The individual discussions are important for a certain period so that the individuals gain a good understanding about the group process. Discussions and situation analysis lead the community members to understand the need for a more systematic way of planning and working will help them to overcome their present problems and achieve a higher state of wellbeing. Once this basic understanding has been gained, the mobiliser can facilitate planning at household level through discussions in the group setting.

With the situation analysis as the background, each household member develops a wish list, which is discussed, prioritised and put into a 1-2 year perspective. The activities proposed by the households are based on the discussions facilitated by the social mobiliser. The wish list is not to be submitted to any outside organisation. It is meant to be implemented by the household and groups, using their own resources.

As the mobiliser uses a holistic approach when facilitating (i.e. including material, social and spiritual aspects), the plan also reflects the participants' wellbeing aspirations. These might include aspirations such as completing the house, digging a well, construction of a toilet, education of a child, or cultivating the land. Spirituality is not explicitly mentioned in the plans, because it is not easy to translate into written plans at the beginning. This is where SMM and FIOH interventions are done. So in the implementation phase, the social and spiritual aspects are strengthened. This is most convenient, as all the planned activities, although they appear in household plans, are actually implemented as a group.

Step II Group plan

In group discussions, the household plans are discussed and three categories are identified. First, the individual household activities, which are implemented with minimal group support. Second are the activities that are collective in nature.

Collective activities are of major importance to the group plan. For example, savings can appear in the household plan, but also in the group plan as a collective activity. *Attam* (labour sharing) during the cultivation season also shows up as a collective activity. The group may also mention the external interventions they need in their plan. The third category is the community activities (done by the whole village) that are conducive for supporting the collective aspects; these are more important in the endogenous development process, and include for example the rituals and ceremonies for starting the cultivation season, in which all farmers have to participate (including non-group members).

Step III Village-level plan

When the SMM has been able to mobilise all the target families into groups, and once the groups are at least six months old (or considered mature enough to interact with other groups), the SMM facilitates a village-level forum. All the mature groups are invited into this village forum. The maturity of the groups is defined according to criteria accepted by the group members. These criteria include the amount of savings, number of savings methods used, amount of credit given, number of group activities conducted per month. Different villages may add other criteria too. Experiences show that it is possible to hold a village forum within a period of 12 to 15 months from the date SMM starts the facilitation process. In the initial stages of the village level forum, problems occur because of dissimilarities between the groups that are coming together. Some groups may attempt to dominate, as newer groups show less maturity than others. This is where the SMM and FIOH coordinators can intervene and promote better governance through more discussions, thus ironing out differences through understanding.

Between 1 and 3 members from each group participate in the village forum. Approximately 7-10 groups participate in the village forum. (In the area where FIOH works they are known as Integrated Community Organisations, ICOs). The village forum also goes through a similar planning process as the groups. The plan at village level includes those activities identified from the groups that require greater intervention at village level (see chart, Planning Process CLO). These are typically the supporting activities that need to be promoted in order to achieve endogenous development goals. The group plans may include how the members are planning to revitalise traditional paddy farming practices. They also may include the necessity for implementation of traditional rituals and ceremonies to be performed at the beginning and during different stages of cultivation season. Most of these practices are done by all the farmers. Such common activities, which need the participation of all or a majority of farmers, are identified from the group plans and included in the ICO plans. So the contents of the final ICO plan can be divided into two categories: resources and services its members (groups) need and resources and services the ICO has to mobilise from outside in order to fulfil the needs of the members.

Step IV Cluster-level plan

The higher level planning promoted by FIOH is at the divisional level, which is above village level. The divisional organisation is known as a Cluster Level Organisation (CLO). A CLO is a federation of all the ICOs in one Divisional Secretary area (the administrative hierarchy of government above village level consisting about 100-150 villages). All the key office bearers in ICOs become members of the CLO. The CLO develops a plan incorporating all the interventions requested by the ICOs. Hence a CLO plan mostly concerns mobilisation of external resources that are required by the member organisations. This plan is aimed at activities of a more political nature.

When working out the CLO plan, the ICO members need to have a clear picture of what they can achieve using their own resources. They identify areas which need wider outside support in order to facilitate their planned activities. For example: the groups and ICOs can manage loans to members up to a certain level. The CLO plan will be about getting larger sums of credit to members through different means. Another example involves training on different aspects of farming. Training on traditional farming can be handled at village level, and is therefore reflected in the ICO plan. Training at higher level, or exchanging experiences with another village in a different region, would be subjects included in the CLO plan. At the same time external organisations, Government or Non-government, look for well-organised and formalised set-ups in order to channel their resources. A Cluster Level Organisation has this capacity.

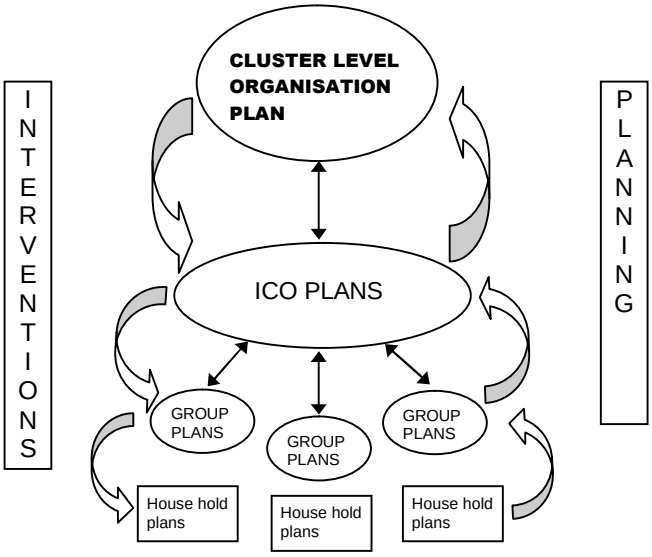
Step V Monitoring

As mentioned above, the planning process that starts from the household and goes up to cluster level is highly participatory and reflects wellbeing aspects as perceived by the communities. These aspirations are well connected with the participants' worldview, because the mobilisers' facilitation helps them to identify and highlight them in this way. The next important step is to monitor the participants' own activities using a participatory monitoring and evaluation system. FIOH provides participatory monitoring and evaluation training for the social mobiliser. This enables the mobiliser to help develop indicators for monitoring with the community members during the planning process. As not all community members are equally able to read and write, the monitoring is done using visual charts and tables, depending on what is most convenient to the particular group.

Monitoring the community members' own achievements is done by using indicators identified by the participants themselves. For instance, wellbeing is understood to mean having ample food at any given time at home. Ample food not only means having enough for family consumption. It also includes having enough for alms giving to the monks in the temple as well as for giving to the needy. (Both of these are ways of accumulating merit according to Buddhist teaching). The use of the traditional farming system in highlands is monitored by noting the plant and animal diversity. The greater the diversity, the less the farming practices have harmed any living creature. Simple systems of

monitoring charts are used to monitor progress. Groups as well as higher-level organisations monitor their own progress continuously in monthly meetings.

Planning process – CLO



6. Planning and implementation at FIOH level

The plans prepared by FIOH in order to support and facilitate the endogenous development process initiated by communities are based on the ICO and CLO plans. Once the ICO and CLO plans are ready, it is possible to identify intervention needs of the communities. FIOH's annual planning involves the amalgamation of the financially and otherwise feasible interventions that have been requested by CLOs. CLOs and ICOs consider FIOH as one of the many external organisations that they have through which to mobilise support. FIOH has used the emergence of the CLOs to phase out its interventions, gradually handing over the responsibilities to CLOs.

Box 2. Example of how the social mobilisation process facilitates ED

Organic farming/nature farming: One of the main constraints that both highland and lowland farmers face today is their dependence on external inputs caused by the green revolution. The problems now prevalent are lack of soil fertility, extensive pest damage and the high cost of fertiliser and pesticides.

Farmers know that the present practices are not wholesome. They experience that these practices go against their worldview and the five precepts of Buddhism (refrain from killing, stealing, sexual misconduct, lying and taking intoxicants). But these modern agriculture practices compel them to use pesticides in order to kill the 'pests'.

Not only are modern farming practices uneconomic, they also go against their worldviews. The mobiliser raises these issues so that they become the subject of discussions, with individual farmers as well as in the group discussions.

The discussions continue and the farmers are encouraged to discuss the traditional farming systems that existed before the introduction of the green revolution. As a result of this analysis and interventions by the mobiliser, there are a large number of farmers who have revitalised their traditional farming practices.

Traditional farming practices (also known as natural farming) are derived from the worldview of the communities, but they also in turn support this worldview. Traditional farming used to be based on the fundamental Buddhist concepts of *ahimsa* (doing no harm) and *mettha* (loving kindness). Under this system there are no 'pests'. All creatures have a function in nature. Farmers used astrology and religious practices to safeguard the crops. They also used nature-friendly techniques to chase away these creatures. Working with nature made the system sustainable.

Revitalisation of the traditional farming practices involved re-visiting the social/cultural system in which they had been nurtured. Although it is not possible to bring back exactly the same cultural system into the present, certain elements could be adapted. Collective action was a pre-condition to most cultural practices and the group formation and organisational formation has contributed to revitalising certain elements of the collectivity that existed in the past.

Farming as a collective practice was re-started with the group system. Most cultural practices that were part of farming have now been revitalised. The spiritual aspects and the practices associated with farming guarded crops and people through the practice of loving kindness and non-harming actions.

FIOH's experience shows that with this type of intervention by the mobiliser, farmers have been able to revitalise traditional practices. FIOH has facilitated this process by providing certain kinds of training and providing opportunities to learn about some farming methods from other similar farming communities.

The group- and village-level forums provide a solid platform for implementing traditional agriculture. Traditional farming is a collective system. As the mobiliser facilitates collective activities, the organisational capacity needed for re-introducing traditional practices is revitalised.

Conclusion

Social mobilisation is an approach for facilitating change in a particular community. The methodology exists and is used by different organisations as a development intervention strategy.

The attitudes, knowledge and the facilitation skills of the mobiliser are crucial for the effectiveness of the approach. Social mobilisation has long been used for many types of development intervention, and FIOH also used this as its main intervention methodology.

Under the COMPAS programme, FIOH underwent a change and started to adopt a holistic approach (including material, social *and* spiritual aspects) to its development work. This change was made possible by providing the mobilisers with the appropriate training. The success of the intervention depends entirely on the attitudes and skills of the social mobiliser and the capacity of the organisations to provide the appropriate skills to the mobilisers. The most important skills and attitudes are the capacity to work in the community through participatory intervention and the respect for traditional knowledge and practices.

Ghana

From the inside out: CIKOD's Community Organisational Development

Bernard Guri and Wilberforce Laate

Background

The Centre for Indigenous Knowledge and Organisational Development (CIKOD) and its associates developed the Community Organisational Development (COD) approach as a way of enabling development facilitators to work with people's cultural resources (material, social and spiritual in the context of their own worldviews) and external resources to attain endogenous development. COD is about enabling communities to mobilise and utilise their cultural assets to manage and direct their own affairs and use them more effectively and interact meaningfully with the outside world for resources for their development initiatives.

The COD approach comprises a systematic set of methods:

- Community Institutions and Resources Mapping (CIRM)
- Community Visioning and Action Planning (CVAP)
- Community Organisational Self Assessment (COSA)
- Community Institutional Strengthening (CIS)
- Learning, Sharing and Assessment (LeSA)
- Festivals as a space for development dialogue with power bearers

The difference between these methods and their conventional counterparts is the fact that they are premised on working with and through the traditional authorities and indigenous institutions and their organisational practices and resources. This enhances ownership and inclusion of the whole community in the development process.

In CIKOD's view, endogenous development can be realised only by adopting the appropriate personal attitude that allows for the inclusion of the worldviews, culture and local resources of local communities. This contribution starts with a description of the guiding principles of COD, explaining how field staff can develop and use the appropriate attitude to enhance endogenous development, and why CIKOD finds it important to work with traditional authorities. Then follows an outline of the six different methods that CIKOD uses to realise Community Organisational Development. The final part is devoted to a discussion of the risks and challenges of working with traditional institutions.

Guiding principles of Community Organisational Development

COMPAS defines endogenous development as 'development from within, based mainly, though not exclusively, on locally available resources, values, institutions and knowledge'. From the CIKOD perspective, endogenous development is seen as a framework for using people's indigenous institutions, knowledge, resources and spirituality for community development. It is an inside-out approach that takes the community resource base, or assets, as the starting point for development interventions. This resource base includes not only physical resources but also the community's institutions, local knowledge, local organisational practices and local spirituality. It is an approach in which people's worldviews and worldview are taken into consideration in the design of any interventions. Endogenous development from the CIKOD perspective is also seen as 'Using what we have to get what we want'. Thus endogenous development is not a hybrid of indigenous and modern as perceived by some people, but rather a means by which people use *their* internal strengths to gain from or influence external resources to meet *their* development needs.

In order for CIKOD to make its concept of endogenous development operational, it needed to develop methods that would enable communities to be able to identify their internal resources based on the 'three world' perspective of endogenous development: the natural, the social and the spiritual as the starting point for the development of any interventions or initiatives. To do this CIKOD, together with its associates in Ghana and the Universities for Development Studies in Tamale and the Center for Development studies of the University of Cape Coast, undertook action research to identify indigenous institutions and knowledge systems in Ghana and how they contribute to natural resources management, local governance and livelihood development. Based on the practical experiences gained through further participatory action research and development with the communities over the years, six processes or methods were evolved. This endeavour sprang from a desire to let development projects unfold within the worldview of the community instead of that of the development agent. COD is premised on the fact that, to create development within the worldview of the community strengthens the local ownership and relevance of the project and thereby creates sustainability and widespread development. Before describing the COD methods we first address the steps we regard as necessary preparation to using these methods and the principles underpinning Community Organisational Development.

Preparation of the self

Some mental and socio-cultural preparation is likely to be necessary before entering a community. This reduces the risk of acting out of synch with the worldviews of the community and therefore increases the chances of incorporating the values, norms and spirituality of community members as envisaged in endogenous development.

The preparation of the self includes the following:

- *Attitudes and behaviour:* Appropriate behaviour is essential to a successful COD process – but this can't be taught in a manual! The most important thing is to

be humble and respectful at all times. Show your gratitude and remember that you are the visitor and keep in mind that 'when in Rome, do as the Romans'.

- *Research:* Intuition and common sense will take you far, but knowledge on the community's norms is also required. Therefore, do some research on the community's norms, protocols and traditions. Find out as much as possible about the local situation. However, be aware that on arrival you might find that the information you collected isn't accurate. So prepare to adjust your perception to the actual situation.
- *Open mindedness:* Prepare to accept and work within the community's way of doing things – spiritually as well as traditionally. Don't let prejudice or your educational training dominate your perception of the traditions and values of the community and always show respect for community norms. Prepare to set your educational and professional background aside so as to recognise the traditional authorities and indigenous institutions as the ones who know their situation best.
- *Flexibility:* Prepare to change and adjust your schedule. Unexpected incidents can easily occur so you must be flexible in your planning. Expect unexpected incidents such as funerals or child naming which could happen after a planned activity.
- *Patience:* Community work can be a very fruitful exercise – if you take your time! Always go at the pace of the community. Rushing to meet targets and deadlines will not create the participatory process that is at the core of the COD methodology. So be patient – and the results will come.

Preparation of the community

For a successful COD process, the community itself needs some prior preparation before the commencement of the process.

The practical preparation includes:

- *Initial community visit:* It is always necessary to make an initial visit to the community to introduce yourself and your agenda.
- *Community entry:* Always obtain permission before entering a community. Find out about customs on community entry from a reliable source and stick to these rules, e.g. when formally greeting a Ghanaian chief, protocol demands that you offer him a bottle of schnapps (gin). If possible, identify a respected person from the community to lead you. If you return to the community with a new agenda you should make a new community entry – and bring a new bottle of schnapps.
- *Time and place:* Sort out all practicalities for the initial meeting beforehand: When is the best time/season to visit? Who should you meet on arrival? Where is the most suitable place for a meeting? What should you bring? Be sensitive to the schedules of the participants. As far as possible schedule meetings to coincide with their usual meeting times – for example avoiding taboo days when people normally stay at home. If that is not possible, negotiate tactfully for alternative meeting times.
- *Interpretation:* If you don't speak the local language make sure to find an interpreter that fully understands your agenda, so that no misunderstandings will corrupt your work. Make sure that you (or an interpreter) can explain the

COD process and the terminology in the local language. In the case of multiple language groups, use the simultaneous multiple self-translation process[6]

- *Contact person:* It can be very helpful to identify a credible contact person of high social standing in the community (e.g. a village teacher, an opinion leader) to introduce you to the chiefs and elders. The contact person can also be helpful in introducing you to the community norms and beliefs, as well as for planning meetings and other practicalities.

Overall guiding principles for using COD

Every community is a unique entity with their own way of doing things, which means that every COD-facilitation process should be moulded to suit the individual community. However, some overall guiding principles apply to most situations. These are outlined below and it will be helpful to stick to these when facilitating the COD methodology.

- *Inclusion:* Work with the whole community. Harness collective action and elicit the support of key players in the community.
- *Individuality:* Each community or social group is an individual entity. Therefore the COD methodology cannot be applied blindly but might need some contextual adjustments. Keep in mind that the community is not a homogenous entity. It is made up of different social groups and it is therefore important to identify these different groups and address and/or empower them individually.
- *Open forums:* If possible use open collective forums, which are inclusive in nature e.g. traditional festivals, taboo days. In all cases use a person from outside the community (most likely you will be the outsider yourself) to facilitate open forums – there is an Ashanti proverb saying that 'it is the stranger who brings new knowledge'.
- *Communication:* Rely on oral communication and culturally sensitive approaches such as songs, stories, proverbs, drama or images to ensure that illiteracy will not exclude people from participation.
- *Participation:* Let participants exercise influence on the course of the workshop, for example formation of groups for group work and time for breaks, so that they feel ownership of the workshop.
- *Local language:* Encourage participants to perform group work in their local language, as this will bring out the true issues at stake in the community.
- *Religion:* Be sensitive to religious aspects – start and end with a prayer (traditional or formal as the community wishes), ideally performed by a participant.
- *Sensitivity:* Be culturally sensitive at all times. In anything you do you should always bear the culture and values of the people you work with in mind and let these be your guide.
- *The facilitator:* Take on the role of a facilitator – not a teacher. By doing this you encourage the community to participate actively, which will empower them to take charge of their own development. As a facilitator you should

[6] People are made to sit in language groups and one of them acts as a simultaneous translator for the group.

regard yourself as a midwife: you are assisting a process of birth and creation. Your task is to help the community come up with answers and solutions themselves – you should only provide the support.

- *Transparency:* Be transparent and honest about your development agenda so that the community can take an informed decision to participate in it or not. Be part of the community's agenda – not the other way around.
- *Time:* Try to start at the agreed time and stick to your schedule – participants might have a long way home and you could end up not finishing your programme.
- *And finally:* Always go at the pace of the community!

Box 1. The role of traditional authorities in Ghana as understood by COD

Traditional authorities in Ghana comprise all the traditional leadership institutions in the community. When implementing the COD, the traditional authorities play an important role. It is therefore crucial to have a good understanding why you should work with these institutions.

Why work with traditional authorities?

In general, there are two schools of thought with regard to discussion on whether or not chiefs and other traditional authorities should play a role in development work, namely: **the ornamental** and **the functional.**

The former sees traditional authorities as a leftover from the past, an undemocratic and old-fashioned institution that should not be included in development work. The latter, however, sees the traditional authorities as a functional and still vibrant power holder that cannot be excluded if one wants to promote sustainable, efficient development. In Ghana as in many other African countries, in spite of a modern political system at the national level, the majority of the population living in the rural areas are still organised around the traditional authority systems and the indigenous institutions. A study carried out in 2008 in Ghana by CIKOD and the Centre for Development Studies at the University of Cape Coast, showed that 96% of 400 respondents see the traditional authorities as relevant for development. Chiefs still play a vital role in the everyday lives of the rural population and if one wants to promote sustainable and long lasting development, inclusion of the chief and other traditional authorities is essential.

The chief and his female counterpart, the queen mother, can be described as the embodiment of the customs and values of the people. The chief holds a range of legislative, executive, judicial and spiritual functions under the traditional system. Chiefs see to the day-to-day running of the rural communities and unlike government authorities, they have the comparative advantage of closeness to the people and therefore they can quickly react if trouble erupts. Chiefs are the first to know when there is water pollution, bush fires, environmental degradation from the use of chemicals or conflicts erupting. Therefore chiefs can also be the first to stop such abuses – that is if they are formally empowered to do so.

The methods used for Community Organisational Development

1. Community Institutions and Resource Mapping (CIRM)

The purpose of CIRM is for communities to map out the existing institutions, both indigenous and formal, and the natural, socio-cultural and spiritual resources in the community, and their potentials as starting points for community development.

CIRM is a participatory method for community entry and diagnosis as it guides the community through a self-examination process and exposes what structures and resources, human as well as natural that are already at hand in the community. CIRM can be further facilitated to motivate community visioning on possible self-reliant community initiatives and action plans to achieve the vision with support from external resources.

CIRM steps

1. *Community orientation*
   The first step is a community orientation meeting where the idea of the CIRM is introduced to the community members. A cross-section of the community, at an open forum facilitated by a development facilitator, brainstorms and lists the traditional institutions and resources that exist in the community. The resources should include the social, natural and spiritual resources that are of significance to the development of the community. The community jointly come out with a vernacular terminology and checklist of questions to work with and conduct a historical analysis of their institutions and resources to identify their relevance and existence in the past, present and for the future.

2. *Formation and preparation of CIRM Team*
   The community then puts together a team (of five to seven people, at least two of whom should be women and at least one should be literate enough to take notes). The development facilitator (usually an external person from a partner development organisation) then trains the team on how to use basic Participatory Rural Appraisal (PRA) tools for information gathering. Then the team dramatises, or does a role-play on how they are going to conduct their work. This gives the community members a chance to make comments and agree with the process before the team gets to work.

3. *Field data collection by CIRM Team*
   The team goes out into the community to collect information from elders, women, youth and spiritual leaders on the formal and informal institutions and social, natural and spiritual resources, and their potentials, challenges, location, availability and social significance. Tools used include open discussion, community walk, analysis of flow relationships, family unit studies, and structured interviews. A physical map is made of the locations of the resources. The team brings all this information back to a plenary meeting presided by the Chief and elders, where the information on the various institutions and resources is presented and validated by the community.

4. *Systematisation*
   Where necessary, it may be necessary to carry out a formal follow-up study to confirm or fill in information gaps that were left from the CIRM and to help articulate and document the results in writing. This may be done by the field facilitator or a hired consultant.

Time frame for the CIRM

The timing of the CIRM process is flexible and depends on its defined purpose and the size of the community. Where the CIRM is for identifying all resources in the community for general community development planning, it will normally take up to one month. Where it is to collect information for the development of a specific development domain, for example seed development, or traditional health development, it will take about one week.

Outputs of CIRM

The outcome of the CIRM is a written report and physical maps that show:

- The existing indigenous institutions (e.g. traditional councils of elders, asafo companies, hunters groups, clan groups, leadership institutions, traditional mutual support groups) and contemporary institutions (e.g. faith-based groups, youth associations, peer groups, women groups, local government institutions such as unit committees, area councils), and their relevance, potential and challenges.
- Spiritual institutions and knowledge on the spiritual resources (e.g. shrines, sacred sites, sacred trees and water points, churches, mosques) and their relevance and challenges for the development of the community.
- Physical map of the resources available in the community (e.g. agricultural land, forest, water, money, labour), their relative quantities, availability and development potential.

2. Community visioning and programming (CVAP)

CVAP is the next step after the CIRM, as it helps the community decide how best to make use of its resources. The purpose is to have the community make a vision about the future based on its available resources and develop an action plan to help it make the vision come true, elaborating the steps needed to get there in the context of the institutions and resources available in the community. If the community can formulate a concrete development programme or action plan and fit it in to the political agenda of the local government, much can be obtained.

The CVAP consists of two parts. First there is a visioning-process where the community brings up visions and dreams relating to the resources at its hands. At the core of the visioning process is to have the community reflect on where it wants to go as a community - what future it sees for itself. After the visioning process follows the programming, where the community prioritises its development needs, develops concrete action plans and agrees on how best to make use of the resources identified through the CIRM.

CVAP steps

1. *Visioning*
   A facilitated discussion is arranged among community members and traditional authorities. Participants should be encouraged to express their dreams and visions for the community relating to the resources at hand. ('Don't dream of an oil-plant if it's gold you have found in your community'). The core of the visioning process is to have the community reflect on where it wants to go as a community. The facilitator helps with structured questioning. Questions to be considered could include:
   - Where was our community 10 years ago?
   - Where is our community now?
   - Where do we want our community to be in 10 years?

2. *Programming*
   This is a process that guides the community to prioritise its development needs, develops concrete action plans and agrees on how best to make use of the resources identified through the CIRM to achieve the vision of the community. The decisions should centre around questions such as:
   - How do we use the resources we have identified to make this dream come true?
   - What practical activities must we carry out to achieve this dream?
   - When do we want to implement these activities?
   - Who will do what and how do we ensure that we all carry out our responsibilities (community contract)?

A concrete action programme should be formulated and written down, reflecting the discussion and providing a time frame to reach the goal. Make sure that all participants agree on the programme to ensure broad based consensus. The role of the facilitator is to support the community in how best they can plan and carry out their own development.

Outputs of CVAP

- Vision statement/ community dream
- Detailed action plan
- Community contract/MOU

Box 2. Community Visioning and Programming in Mampong
In Mampong, Eastern Region the CVAP resulted in the queen mothers setting up virgin clubs in order to minimise pregnancies among teenage girls.

3. Community Organisational Self-Assessment (COSA)

Having developed a vision of where the community wants to go and having set out how it might go about this, work needs to be done on the community's organisation. The purpose of the COSA is to guide the community group through a self-examination process to identify its organisational capacity potentials and/or gaps. It is based on the underlying assumption that communities already have some organisational capacities, which they have been and still are using to manage their own

development processes. During a COSA workshop the community will become aware of its current capacities and what capacities it lacks in order to make the vision identified in the CVAP come true. COSA can be carried out with the whole community or individual groups that have been specifically tasked with implementing the action plan. A thorough awareness of the organisational potentials and gaps will help the community group identify and address the organisational challenges of the community. It should be noted that the focus of COSA is to assess the human resources and various skills that exist, but that physical resources and infrastructure also deserve attention and should not be left out. COSA can be carried out as part of a CVAP process or as a separate activity.

COSA workshop

This is a facilitated workshop for the community to reflect on their development plans. The reflection may be guided by the following questions:

- How have you carried out previous development projects in the community?
- What problems did you face in the implementation?
- What did you implement properly and what could you not implement and why?
- What problems do you foresee in the implementation of the new development programme?
- What will you be able to do properly and for what will you need some support.
- What type of support do you need?
- Where can you get this support from?

The discussions may be done through focus group discussions, where different categories of the community, e.g. women, men or young people, work in separate groups to ensure that everyone participates. Based on reports and the observations of the facilitator, the whole group can together analyze and assess the capacity needs of the group. Through this process, the community or group should now become aware of their own capacities as well as the gaps.

Outputs of COSA

The expected outputs of the COSA process are: a stronger motivation of the community to use the organisational capacity potentials already at its disposal; a self-selected list of the organisational capacities and capacity gaps/needs of the community; ideas on how to fill the capacity gaps and where to get support for that.

Box 3. Community Organisational Self-Assessment in Forikron
After identifying and strengthening its organisational capacity needs, the community of Forikrom in the Brong Ahafo Region successfully engaged the District Assembly and has now obtained sufficient electric poles to provide the whole of Forikrom community with electricity.

4. Community Institutional Strengthening (CIS)

Through the CIRM a wide range of local institutions might be identified. However some of these may not be strong enough to carry out their functions or take on new responsibilities that emerge from the visioning. The purpose of CIS is to address the organisational gaps of community groups identified during the organisational self-assessment, and to enhance their capacity to take on new responsibilities related to

the development of the community, and thus take a step towards implementing development initiatives.

An important aspect of CIS is the revitalisation of dying institutions, which may be facilitated around the following questions:

- What was your group/community like 10 years ago and what activities was it engaged in?
- What is it like today and what activities is it engaged in?
- What other roles can it perform today in relation to the development of the community?
- What capacity support does it need to be able to perform these new roles?

CIS can take the form of training workshops and exposure visits to provide technical skills, inspirational lectures by invited resource persons (e.g. politicians, university lecturers), and can also include logistical and financial support for livelihood development. CIS has also been facilitated through storytelling, where a story (fictional or real) can form the basis of a group discussion.

Outputs of CIS

The main output of CIS is well-motivated communities that have been empowered to address their own development initiatives. This is usually evidenced by the emergence of revitalised local institutions in the community, which have a voice they can use to engage in community mobilisation as well as engaging external development agents like district authorities NGOs etc. for resources to implement their action plans.

Box 4. Community Institutional Strengthening in Tanchara

After having gone through a CIS process the ten sections of Tanchara, the Upper West Region are now reorganised and revitalised under their sectional heads and hold bi-annual community forums at which government development agencies and NGOs are invited for dialogue on the development needs of the village.

5. Learning, Sharing And Assessing (LeSA)

LeSA is a community peer review method that enables communities with similar development agendas to exchange developmental experiences and knowledge. This method has been developed in order to guide communities to learn from each other and share experiences amongst themselves – Learning, Sharing and Assessing (LeSA). The background of LeSA is the fact that most evaluations of development projects leave little or no opportunity for the community itself to actually learn from the knowledge derived.

LeSA rests on three pillars. At the core of the LeSA framework is the **assessment of** the work of other communities. Participants are also expected to **learn** about how other communities identify and address their problems and thirdly they are to **share** their experience and knowledge with others on how they addressed similar problems.

LeSA takes the form of exchange visits between communities or facilitated meetings involving a number of communities to share experiences around issues of common interest. It is different from ordinary community visits in that it is a facilitated process structured to enhance maximum learning, assessing and sharing between the community groups.

The LeSA process is normally made up of two exchange visits. However, it should be noted that it is important to find a form that suits the needs and capacities of the communities involved.

LeSA steps include:

1. Initially the community should decide on the persons who are to go on the LeSA visit. Traditional authorities, leaders of indigenous institutions and other community representatives are the obvious choices. Get the community to consider whether other groups or individuals could also benefit from attending the meeting, or might wish to contribute in one way or the other to the exercise.
2. The visiting team should, for economic reasons, consist of a maximum of four people. This is also a way to ensure that the number of participants from the two exchange communities is the same.
3. Representation should moreover be gender (men and women) and generational (youth and elders) balanced so that the whole community is represented.
4. The time-frame of each LeSA visit is one to two days. This does not include travelling time.
5. In order to create ownership and responsibility of the process among the communities involved, some degree of cost sharing is advisable, e.g. you as a facilitating institution can pay for transportation, while the host community provides accommodation and food.
6. The communities can carry out the LeSA visits without any supervision. However, as a facilitator you might have an interest in supervising or following up on the visits in order to document their contents.
7. During the LeSA visit, the visiting community reports on the host community's activities, achievements, challenges and how they addressed the challenges and vice versa.
8. By the end of the LeSA visit the two communities should have evaluated their development experiences and held the process up against the action plan. Have they obtained their goal? If yes – how? If no - why not?
9. If possible, involve the community radio so that the outcome of the visits can be shared with the whole community.

Improving the LeSA method

If several communities have all participated in a LeSA programme, arranging an experience-sharing workshop after the LeSA visits have been conducted might be helpful for a facilitator to obtain knowledge on the methodology and improve it. Here participants can narrate and discuss their experience with the LeSA visits.

Outputs of LeSA

It is important to note that the LeSA is carried out during the implementation of the action plans of the communities, where the goal of the intervention has not necessarily yet been achieved. The major outputs are experience- and knowledge-sharing on possible solutions to the problems communities face. The outputs are usually documented in photos of the meetings and activities. Audio recordings and participatory video clips have also been used. Written reports are sometimes produced

but seldom used by communities themselves. Audio recordings can be played back to the communities through community radio.

Festivals as space for development dialogue

Throughout the process of COD, there are different moments where the whole community needs to be included in the dialogue process on decisions to be taken, or needs to be informed of the progress attained. Festivals are important spaces for this dialogue with the community.

In Ghana, as in many other developing countries, every community has traditional festivals, for example harvest festivals. These festivals are events that bring together all community members, including those living outside the community itself. Because of their inclusive nature, such traditional festivals can provide an embracing platform for a development dialogue to unfold, where all categories of people (chiefs, elders, women, children) can voice their development concerns and needs. Festivals provide an opportune moment to facilitate a dialogue on development that engages the whole community and external actors. The chief and elders may invite government officials or development agencies operating in the area. As such, these occasions can also be used as an advocacy platform.

Facilitating festivals as space for development dialogue comprises four basic steps:

- Preparing communities to be pro-active and able to articulate their developmental priorities.
- Softening the ground, to cultivate the interest of development agents so that they are willing to participate.
- Organising a one-day forum during the festival and facilitating a win-win dialogue between the community and development agents.
- Supporting the communities to develop follow-up activities so that the development agents responsive to the demands presented.

Using festivals as space for community dialogue usually takes place after the implementation of other COD methods, however they can also be organised as a stand-alone development intervention.

Box 5. Organisational Development versus Community Organisational Development

Organisational Development	Community Organisational Development, based in endogenous development principles
Focuses on individual person or institutions in community	Focuses on both individuals, institutions and the community as a whole
Emphasis on rational self-interested individual	Aims at building relationships and social capital, and bringing about social cohesion
Results in strengthening of individual choices	Integrates the indigenous and the modern, resulting in broader community support
Carried out by external consultants	Collective approach involving members of the community and outsiders, that addresses both individual and community interests
Requires group entry requirements that may be exclusionary of some category of the poor (e.g. entry fees, educational status, dress code) as in the case of cooperative societies	All inclusive and open to all categories of people in the community, as the sole entry requirement is to be a member of the community
Based on western rational principles of competitiveness and efficiency	Importance to the material as well as spiritual wellbeing and social cohesion

Reflection: risks and challenges in working with indigenous institutions

CIKOD does not doubt that indigenous institutions and traditional authorities have the potential to act as strong and efficient development actors in collaboration with NGOs and other civil society organisations. However, when engaging with traditional authorities one must be aware of the risks and challenges that is part of this relationship. We list some of these here, but bear in mind that unforeseen challenges can come up at all times when working at the local level.

- **Don't romanticise:** When working at the local level, take care not to romanticise the indigenous knowledge and institutions. Traditional authorities might have high local legitimacy, but that doesn't mean they shouldn't live up to certain standards e.g. transparency and accountability.
- **Don't underestimate:** Indigenous institutions should not be underestimated. They might differ from other 'conventional' development partners, but they normally carry great potentials for creating change in the community.
- **Assess your work:** Always consider the actual outcome of your work. Engaging with traditional authorities is an exciting and challenging exercise, however there is a risk that the outcome might not correspond with the energy and resources you put into it. Make sure that you outline your expected outputs before engaging with the community and that, at the end of the day, you take an objective look at the actual outcome. The 'hot-air trap' is easy to fall into.
- **Have confidence in traditional institutions:** Rely on the traditional institutions – and help them develop their organisational capacities. This is at

the core of the COD framework. It can be tempting to set up new institutions specially designed for the specific development purpose at stake, but such new institutions are likely to die a natural death after you have left – and they are most unlikely to resurrect!

- **Be realistic:** COD is a catalyst for locally-led change. The community explores its problems collectively, share ideas and begin to believe in its own ability to make change. However, take care not to build up the expectations of the community. Always make sure that the expectations of the community correspond with the expected outputs of the COD process so that the community's self esteem in the developmental field will be boosted – not lowered.

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Ghana

The Tanchara project: a practical application of Community Organisational Development

In this essay a CIKOD field facilitator tells how he applied the COD process in Tanchara and the results so far.

The village of Tanchara lies in the northern part of Ghana, not far from the Black Volta River. The name Tanchara means 'between the mountains' in Dagaare, the local language spoken there. The village is made up of ten small communities scattered in the dry savannah landscape. Employment opportunities are limited, illiteracy is widespread and as the weather is hot and dry and the rainfall unreliable, farming, which is the common income-generating activity, can at times be a complicated affair. The traditional system of governance in Tanchara centres around the chief, the Tanchara Naa, who is supported by 10 sub-chiefs.

In 2003 CIKOD started working in Tanchara in collaboration with the Tanchara Youth and Development Association (TYDA). The purpose was to support the village to revitalise and use their indigenous institutions and knowledge base to better manage their natural resources and use them for their livelihood development. The following is a narration by a CIKOD field facilitator on how he facilitated Community Organisational Development (COD) in Tanchara.

Preparation of the self

We started with a retreat for all the field staff in the CIKOD office. It was the most important step in the COD as it enabled me to adopt the right attitude necessary for promoting endogenous development. My colleagues and I reflected on the COD guide, in particular on the 'preparation of the self" for working with the community: on the steps that would be required to ensure that we would be able to work from within the worldviews of the community. Each of us identified possible challenges we could face and prepared ourselves to address those challenges. We identified our knowledge gaps by peer-reviewing each other and filled the gaps through open discussions.

Preparation of the community

I made an initial reconnaissance visit to Tanchara to meet the chief to inform him about the programme. I first telephoned the chairman of the Tanchara-Youth and Development Association who made the appointment and took me to meet the chief. After being introduced to the chief and his elders, the chief asked about my mission. I

presented CIKOD and its work, explaining the concept of endogenous development as a new approach that centres around respecting and including the cultural values and assets of the community as the starting point for their development initiatives. We talked about previous development interventions, which apparently had only led to disunity in the village. The chief agreed that it would be a good idea to work with CIKOD and try out the endogenous development approach. We agreed on a day to meet with the rest of the community to discuss the issue further.

Community orientation

On the agreed date, I returned to the community, first reporting to my contact person who took me to the chief to announce my presence in the village. The chief had already sent a message to all his ten sub-chiefs to inform their people to gather at his palace for this meeting. At the meeting, I presented the endogenous development concept and explained CIKOD's interest in running a pilot in Tanchara. This generated a discussion about the institutions present in the community and their continued relevance for development. Some people lamented previous interventions by some NGOs in the village, which had left the village worse off. I then presented the COD approach, and explained my role as a facilitator and what would be expected of community members. When everybody was clear on this, they invited me to come again on another day to set up a team to carry out the Community Institutions and Resource Mapping (CIRM) in the community. A date was fixed for another community meeting and commitments made by all to be at the meeting on time.

Formation and preparation of the CIRM team

On the agreed date, I returned to Tanchara to meet during an already organised community forum at the chief's palace. I did a recap with the community on what had been discussed at the last meeting. I further explained the CIRM process and what would be needed to carry out a CIRM in Tanchara. Through a consensus process, the community selected five people – two women and three men – to form the Tanchara CIRM team. The members were selected on the basis of the commitment they had demonstrated in community activities. One was a teacher, and he was given the responsibility of recording the team's work. I then facilitated a discussion about the institutions and resources, and the kind of information they would want to collect about these. The discussion centred on the following issues:

a. The existing Indigenous Institutions (IIs), Traditional Authorities (TAs), as well as the formal institutions, such as non-governmental organisations, that provide services for or facilitate the development of livelihood activities.

b. All assets in the community:
   - Biological assets (threatened tree species, crop and animal species, medicinal herbs)
   - Natural assets (clay deposits, natural water sources, raw materials for local crafts, natural sites for water collection)

- Cultural assets (traditional architecture, local crafts, traditional artefacts, indigenous technologies, traditional medicine in the community)
- Social assets (festivals, health centres, educational facilities, social centres, markets)
- Spiritual assets (shrines, sacred groves, forests, tree, water points)

c. The livelihood activities undertaken by youth and women that depend on community assets, and prioritising these.

Based on the discussions, the team came up with a list of questions (checklist) that would guide their information collection. The list was prepared in the vernacular language to be sure everyone understood the issues and process.

I took the team through different tools they could use to collect information in the community: PRA techniques including focused group discussions, individual interviews, field observations, transect walks, resource mapping. The team was made to present the way they would carry out their assignment using the PRA tools through role-play. This was a very lively session with lots of discussions and suggestions on what the team should be doing in the field. At the end of this, the CIRM team led the discussion to agree on a timetable for visits to various sections of the community to collect the information. They also agreed on when the team would report their findings back to the community.

Implementation of the CIRM

Following the plan that the team had drawn up, they agreed to work as one team. The team visited each of the ten Tanchara communities as a group. In each community they visited households and discussed the questions on the checklist. They also met the *tindana* (the spiritual leader) of each section, and the paramount *tindana*. The teacher in the team recorded the results of the meetings. In the process of collecting the information, I visited the team twice – on the first day, when the team went out into the community, and on the last day. On the first visit, I assisted in clarifying the assignment and addressed organisational problems they were facing. On the fifth day when the data collection phase was done, I collected all the information from the teacher and, together with an expert from the University for Development Studies, we put together a coherent report. In writing up the report, we asked more questions to fill in gaps that we noticed in the data collected by the team. In addition, I took along a video camera and recorded some of the resources they had identified.

Community visioning and design of action plans

On a date agreed by the chief and community leaders, a community meeting was held where the CIRM team and me as the facilitator presented the report of the CIRM exercise to the whole community. This took the form of listing the social institutions, the natural resources and the spiritual resources that the team had found. I also played back the video clip to them. Community members commented on the reports, disagreed with some information, added new information and modified some

information. At the end of the meeting, the report was accepted and adopted as a document for the community. Then I drew an outline of the village on a flip sheet and people were encouraged to locate the various resources on the map. After a lot of lively debates, a community map of their resources was drawn up. I led a discussion to come up with a community vision based on the resources identified. I asked the following simple questions to direct the discussion:

- Where was our community 10 years ago?
- Where is our community now?
- Where do we want our community to be in 10 years?

I captured the responses and presented them in the form of a vision statement. I again led a discussion to facilitate the development of programmes and action plans to be able to reach their vision. I asked the following simple questions:

- How do we use the resources we have identified to make this dream come true?
- What practical activities must we carry out to achieve this dream?
- When do we want to implement these activities?
- Who will do what and how do we ensure that we all carry out our responsibilities (community contract)?

I used the responses to formulate development issues the community might want to address. These were prioritised following further discussions and developed into clear development activities with a time-frame for implementation. A community contract was also agreed on with rules to guide the implementation of the planned programmes.

Implementation of the action plans

For implementing the development plans, the chief proposed that community members would provide all the labour requirements. They should also use the local resources they had identified where relevant. This matter was discussed and agreed to. I informed the community that if they could organise themselves very well, they would be able to demand resources from the District Assembly and other development agents for the implementation of those activities that needed external support. The chief decided that he would organise durbars during Easter and Christmas, and he would invite government officials and development organisations so that the community could present their demands and dialogue with them for support. This was accepted by all, adding that this would also be an opportunity for the sons and daughters working outside the village to come home and make contributions towards the development of the village. This has since been institutionalised and during Easter and Christmas, community forums are organised to review the village activities and present the projects to external agencies.

The impact so far

The achievements so far are best described by the two oral testimonies from members of the Tanchara community, recorded in an evaluation in 2008:

- 'We had a mapping out programme where we looked at the strategic resources in the village. We had a forum where people brought all the types of hidden crops that were not known by the people in the village. We also decided to map out where we have traditional medicine, the sacred groves and water points, clay deposits, as well as traditional healers and all kinds of things that were almost forgotten. That was one of the most tremendous impacts CIKOD made and we decided to go further with them.' **B.B. Saseri, opinion leader, involved in many activities in Tanchara**

- 'As a result of CIKOD, we have now realised the value of the 25 sacred groves and four water sources in the village. We have an opportunity to conserve indigenous fruits and plants that are no longer seen outside these groves because of bushfires. We have decided to plant fruit trees around them to ensure their protection and contribute to food security.' **Daniel Banuoko, Coordinator of the Tanchara Project**

Bolivia

AGRUCO strengthens communities' self-esteem and identity

'There is so much to do that all the resources become exhausted, except those arising from within ourselves'

Cesar Escobar

Background

This contribution describes AGRUCO's experiences in implementing the project entitled 'Self-Management and Endogenous Development in the Jatun Mayu Basin'. Started in 1999, the project supported 350 families from seven communities to strengthen their local organisations and diversify their agro-ecological production. The communities are spread over an area of 235 km². Activities related to food security, improving irrigation systems, agroforestry and small animal production were also undertaken.

The project involved a process of constant reflection with the indigenous small-scale farmers, hereafter referred to as peasants (*campesinos*), on the importance of revitalising and applying local knowledge and organisational strength as the keys to overcoming problems of agricultural productivity, food security and difficulties encountered with state organisations such as municipal governments and prefectures. Looking back we have come to understand that endogenous knowledge and organisational strength are like a seed in well-fertilised soil: they form the foundation upon which the development of other productive and social activities is built.

Furthermore, during this period various studies were conducted which helped AGRUCO to evaluate specific projects, and gain in-depth knowledge of the cosmovision and livelihood strategies in the communities. Students from different disciplines within the University followed courses in which they conducted practical exercises on knowledge revitalisation and formulated productive projects in collaboration with the communities.

Currently, we are evaluating the results of the fieldwork; this includes an assessment of the aims achieved and the projects' impact, taking into account social, material and spiritual aspects.

It is worth highlighting that previous experiences in rural development projects in the area were implemented by NGOs, guided by what we refer to as 'conventional instrumental thinking', where the outside actors (NGO) are 'the ones who know, the ones who finance, and the ones who do'. Conversely, local actors (the indigenous peasant communities) are 'the ones who learn, the ones who receive, the ones who

watch how things have to be done'. This vision has influenced the development experiences of rural communities in Bolivia for the last 40 years.

The origin of the project

AGRUCO is a centre based in the Universidad Mayor de San Simón in Cochabamba, Bolivia. Since its establishment in 1986, it has been involved in sustainable rural development, agroecology and the revitalisation of local knowledge. Peasant organisations have come to know us through these themes. Over the years, we have come to realise that the themes we have worked on with the communities will have no future if they are not adopted in government policies (at all levels), and, most importantly, if the understanding of development does not change. We have undergone an internal process as an institution, and have adopted a concept of development based on the idea of wellbeing (*vivir bien*) to guide us along the path of endogenous sustainable development.

Specifically, and in relation to the emergence of the Jatun Mayu project, the knowledge we had gained on natural resource management was an important factor. Our monitoring of natural resources situations indicated that most ecosystems in the country are in crisis, and we are certain that local knowledge and self-esteem are 'resources' that are also in crisis.

AGRUCO has worked in communities near the Jatun Mayu basin area since 1990, focusing on soil and water conservation. The Jatun Mayu communities heard about our work and invited us to work with them. Within our team we had agreed that we wanted to adopt a more integral approach that would go beyond immediate goals of soil and water conservation. Although the latter are very important issues, they are also limited in terms of the scope they offer for real transformation in communities. The conclusion of the AGRUCO team was that we should work more deeply, adopting an approach based on revitalising local knowledge and interculturality.

The complexity of rural development means that implementing individual projects in isolation has resulted in negligible impact. The various projects adopted different approaches, causing the efforts of all actors to be spread too thinly. At AGRUCO we started to see the need to implement integral projects based on endogenous sustainable development.

We understand endogenous sustainable development to be the strengthening of local potential, capacities and perspectives for development, complemented by external elements.

The course of the project implementation

As an AGRUCO team (initially composed of a sociologist and an agronomist, both of whom had extensive experience of working in peasant communities), we attended a meeting of the indigenous peasant organisation, where the heads of seven communities were present and where we were formally introduced for the first time. Previous to this we had had some casual meetings in which we had suggested the possibility of working together.

The peasant organisation meeting is attended by representatives of all the families in the community, most of whom are men. Some women represent their husbands. These meetings take place regularly every month and attendance is obligatory for the families of the community. Topics are discussed such as the school situation, road repairs, outstanding debts of members, or the resolution of problems between families. At the meeting we attended we were assigned the second item on the agenda, indicating that the community regarded our participation as an important subject.

Once it was our turn to speak, we explained in general terms the kind of work we intended to do, and that we were interested to learn what their expectations were of working with AGRUCO. The themes that emerged were improving agricultural production and organisational strengthening. Then we agreed on the first steps to take, and listed the activities we would undertake in the following months, until we could secure the necessary funding.

When drafting the action list, we were constantly aware that there are some tasks that are more overarching and permanent in nature, and not necessarily related to previously established stages or steps. These include the enhancement of self-esteem, local potential, cultural identity and revitalisation of local knowledge. We will explain later how we tackled these themes.

It is important to note that we used *Quechua*, the mother tongue of all the families of the community, for all levels of interaction.

The following steps were agreed upon with the communities: to carry out a community diagnosis and to agree upon which activities we would carry out within the project.

1. From community diagnosis to community self-evaluation

From our point of view, the purpose of the community diagnosis was to gain an understanding of the three following spheres:

Natural arena: current state of natural resources, current productivity of agricultural and agroforestry systems, their productive potential, and the main diseases and pests of animals and plants.

Social arena: organisation forms, social relations of production, product destination, migratory dynamics, annual household income.

Spiritual arena: ritual calendars for the agricultural cycle, description of important rituals and debate about the community members' vision of their natural and social environment.

These were elements we felt we had to learn about if we were to get closer to the community's knowledge. But it was also important to keep the agenda open so that the community could establish the points that they considered important for executing the diagnosis. The community suggested the following theme that were not included in the agenda:

- the role of elders in the revitalisation of local knowledge;
- the situation of young people and the need to support them in the processes of professional development;
- the importance of inculcating respect in young people for their elders and adults, and appreciation of their cultural identity and the values associated with this.

We then combined the two agendas to make a single guide for the community diagnosis, in which the contents were separated into the three spheres: social, material and spiritual.

The community diagnosis/self-evaluation took about five months of fieldwork, during which time the AGRUCO staff stayed in the community for about three or four days per week. In two of the seven communities, the leaders gave us a place to sleep, cook our meals and rest at the end of the workday. Over the years, these places have become the permanent accommodation for the AGRUCO team, which expanded gradually to include two agronomists, a sociologist and a communicator.

Thus the diagnosis process unfolded along two simultaneous tracks. One followed what we regarded as important, already oriented towards endogenous sustainable development. The other followed the local perspective that included explicit interests, and perhaps some implicit ones such as regaining control over their own potential, and eventually, over external inputs such as funding and opening up of opportunities for commercialisation of agricultural products.

Table 1. Techniques used for community diagnosis/community self-evaluation

Techniques	**Aspects common to ED and the participative approach**	**Aspects where ED differs from the participative approach**
Interviews	Structured and semi-structured interviews with key informants, workshops with focus groups. Questions formulated using simple terminology in local language.	Gaining confidence through an attitude of equality in the relationship, support to families, and informal dialogue with the families (case studies). Interviews with at least of the 20% of community members.
Transects	Joint participation (of local and external actors) in local evaluation (uses, local names) and external evaluation (scientific names, density, taxonomic classification) of natural resources.	Deepening and promoting cultural appreciation and relevance: ritual, medical and landscape uses. More and richer local criteria in classification (e.g. of soils: colour, location, stoniness, use, temperature, humidity, relief).
Talking maps	Appreciation and local relevance of resources available in the community.	Location of sacred places included. Local understanding of spatial organisation of production, based on humidity, temperature, relief.
Joining in social and spiritual activities	Participation in events that are not directly related to objectives of the field programme.	Sharing the same social 'values' and participation in customs: dance, drink, food. Not trying to be a member of the community, but avoiding sense of distance and superiority.
Socialisation workshops	Results of interviews and perceptions of the technical team are presented and community gives feedback on outcomes.	Prompting of debate on topics of local knowledge that highlight importance of self-esteem and cultural identity in programme implementation.

In general, the process resulted in important quantitative data being obtained; but then we realised that the qualitative information did not live up to expectations. This

was related to the level of confidence the informants had towards the team: the local actors intentionally omitted much of the information related to local knowledge, cosmovision and rituality. In other words, in the first data entries, they told us what they thought we wanted to hear.

Although the community had confidence in AGRUCO, it wasn't sufficient for the community to feel they could share topics such as their religious beliefs, values and knowledge regarding nature and forms of production. Generally, communities have thought it is their 'own' characteristics that lie at the cause of their economic limitations. This also applies to the issue of spirituality: they consider their rituals as being bad or being rejected by city people. We invested time in fraternising with members of the community so that they came to understand that AGRUCO technicians worked not only on topics such as agroecology, but that they also respected and supported the local culture, rituality and knowledge.

After some months, by accompanying community members and becoming more involved in community activities, the quality of information for the diagnosis improved and included more specific details. At this point the first obstacles to communication and gaining confidence had been overcome, thanks to the time invested in fraternising and sharing experiences between the communities and the technical team.

The most interesting thing we observed was that the best moments to share knowledge and cosmovision did not occur in the formal spaces like workshops and tours of the community, but rather during informal moments (e.g. breaks, lunch in a family home, or while chewing coca leaf together during long walks), or during conversations on other subjects (e.g. weather, the country's political situation, health problems of a community member, or other daily problems) rather than the themes that made up the 'narrow agenda' of the diagnosis.

Subjects that came up in those moments included knowledge, perceptions of and visions on different themes, such as soils, water, rituality and internal social relations. That is to say, an agenda of the community itself emerged, in the form of a self-evaluation or themes they wanted to deal with. These were the first experiences where AGRUCO (within the COMPAS framework) started to develop a methodology through which the local actors could formulate their own agenda. In short, the combination of the formal diagnosis with local themes led to the idea of a self-evaluation or an agenda owned by the community.

At this stage, we learned a methodological lesson: it was the outside actors' involvement with, and sensitivity and commitment to the issues of importance the community, and not only 'our' own points of interest, that enabled mutual confidence and, thus, generated openness. We liken this to the relationship between a married couple, which is one of complementarity. Given that the Andean vision of the world is conceived as being in pairs (*Chachawarmi*, *Yanantin* = two lovers together), we continued to build on this metaphor. Local actors *and* external actors had to be as one but without ceasing to retain their own identity, different but complementary. To achieve this, the technical teams needed to possess a high level of sensitivity towards the culture and the people's problems. The team had to have a good understanding, not only of the technical, but also the social, cultural and political reality of the indigenous peasant communities.

2. Agreed actions and responsibilities

Once the community diagnosis/self-evaluation had been completed, the AGRUCO team synthesised the results and shared them during the regular meetings in each of the communities. Some critical points were identified collectively in these meetings, such as soil degradation, biodiversity loss and a strong level of social organisation, all of which were lacking in the community's agricultural activities.

We presented the results using flip charts and slide presentations. It is known that visualising what we want to share is very useful when it comes to working with peasant communities. But going by the response of the participants during the meeting, we learned that it was the communal debate concerning future steps from that point on and what role social organisation should play that was the true mobilising factor. Intuitively, communities knew that social organisation is the axis around which the community dynamic revolves. We know, through our experiences in other communities, that involvement in development projects tends to be at the level of the individual or family, and rarely is the community as a whole involved. However, experiences that are at the family level and that do not involve the whole community are often inefficient when it comes to resolving local problems, even when these problems are specific and not necessarily structural.

In subsequent meetings, we left aside the pretty pictures and schemes, and we focused instead on identifying the points of convergence or conflict in the community, encouraging debate and sparking the participants' interest. For example, we presented the case of the participation of some of the delegates of the community in the meeting with the municipal government, where AGRUCO had also been present. Community delegates meet with the municipal government every six months. We noticed, first, that the delegates did not speak much; second, their proposals were not clearly stated; and third, they requested that chemical fertilisers be provided.

This generated a debate in the community, where the former heads and the women of the community questioned the fact that the delegates had been so submissive toward the municipal authorities at the meeting. We questioned the fact that they kept promoting the use of synthetic chemicals and underlined the harm these chemicals cause to people's health and the soil. There was a lively debate in which members of the audience defended both positions, until, after an hour of discussion, they had come to the conclusion that what was needed were communal leaders with better knowledge of issues external to the community and more self-confidence. And since they had invited AGRUCO, they couldn't keep on asking for synthetic agrochemicals to support their conventional agriculture.

Another technique used to arrive at agreement on activities was the participative development of ritual calendars for the agricultural production cycle, where the amount of time that would be needed to implement the activities was included. This tool was very useful because it became clear that we (community members and AGRUCO technicians) had been setting our targets too high, given the large amount of time of the families devoted to their various activities. We learned that we had to adjust activities and targets to their real time, where the community members committed themselves to take time from other activities to fulfil the agreements we were working towards.

The ritual nature of the calendars has to do with the importance of activities such as the time to observe signs and/or indicators for weather prediction,

determining the date for starting agricultural activities. Other rituals include the celebration of the first harvest, when verification takes place of whether the yield will be good, regular or bad. This in turn determines the migration cycle and its intensity. If the ritual indicates that it will be a bad harvest, then the family will have to prepare for more intense temporary migration. Another very important ritual is the asking for rain, since favourable distribution and intensity of rain during the cultivation season depends on this ritual. These are just some examples of the contribution of the ritual calendars for the agricultural production cycle to the implementation of endogenous development.

Thus, we finally identified work areas, activities and targets to be reached both at the community level and for each family. The work areas and activities were very diverse, and many years of work in the communities and many external resources were needed to achieve some impact.

For this reason we had to establish what AGRUCO would be able to contribute, and what it was necessary to ask the municipal government to contribute. And we had to continuously seek other funding sources until the community had fulfilled some of the conditions to be able to carry out activities by itself and with its own resources (above all, human resources). Looking back, we estimate that AGRUCO contributed no more than 5% of the requirements planned for in the diagnosis at that time. The community understood this and we set out the limits of what it would be possible to achieve in the following four years of work within the AGRUCO project, given the available financial resources and time. We develop some lessons from this experience in the conclusion.

Many of the activities planned for as a result of the diagnosis have since been implemented by the municipal government, NGOs and by the community itself. Nevertheless, we estimate that at least 50% of the activities identified in the diagnosis are still pending. There has been change though. Today the communities have established a very strong management foundation (solid organisation and self-esteem) from which to implement the outstanding activities with their own resources, or they have enough capacity to manage external resources from the state or private sources.

This process of identifying work areas and activities we now refer to as Integrated Community Programmes for Self-management and Sustainable Development (PICADS, using the Spanish acronym), our fieldwork method. In the case of Jatun Mayu, the PICADS themes of organisational strengthening, food security and cultural revalidation formed the three main areas of work. In each area, specific projects were established. For example, in the area of food security, it was agreed to set up projects on soil conservation, agro-ecological production, agroforestry and small animal production. In the area of cultural revalidation, projects for cultural festivals, creating information-sheets for revitalising knowledge, and knowledge and experience exchange workshops were agreed upon. In spite of the 'ambitiousness' of the projects, once again, they take up no more than 5% of the community requirements.

Some of the PICADS projects were structured into the proposal we developed later with COMPAS in Work Phase I (1999 - 2002). Other projects were taken up by the municipal government and others have been shelved for lack of funding.

Table 2. Techniques used in the second phase of work, apportioning actions and responsibilities

Techniques	Aspects common to endogenous development and the participative approach	Aspects where endogenous development differs from the participative approach
Debate	Used to collect local criteria and to coordinate activities.	Local criteria guide the work to be done. Used for self-evaluation of the community work and to evaluate the work of the outsider technical team (AGRUCO-COMPAS).
Ritual calendars for the agricultural cycle	Used to establish periods and deadlines for achieving programme activities, depending on community availability and technical appropriateness.	Incorporation of the ritual calendar itself, which determines the productive activity of the community.
Joining in the social and spiritual activities	Participation in events not directly related to the coordination of activities and delimitation of co-responsibilities.	Sharing the same 'values' in socialising and customs: dance, drink, food. Not trying to be a member of the community, but avoiding sense of distance and superiority.

Finally, in this stage we agreed on which roles would be the responsibility of the communities and which would be the responsibility of the AGRUCO staff. This was done at the same community meetings and using the same debating methods: provocations, listening to everyone's opinion, contrasting positions, and adopting conclusions that were accepted by more or less everyone. In this way, main responsibility was assigned to the families regarding the work to be done on the parcels (sowing, soil conservation, crop disease treatment). Leaders of the community were assigned the responsibility of following up the families' goal achievement, of organising meetings and workshops, developing rituals and communal works. All of these would be agreed in the meetings and then guided by the leaders.

Responsibilities assigned to the AGRUCO staff included technical support activities, supplies purchase in the cities, support to and work with families, organisation of partial evaluations and writing of technical and financial reports.

This process lasted approximately a year and yielded the following lesson: obtaining the widest possible participation and encouraging debate are the keys to establishing joint responsibilities for carrying out activities. Conducting a debate enabled us to learn that the most important elements for good implementation of projects are local knowledge and organisational strength.

3. The implementation itself

Techniques used in the social arena

Field activities started once the external funding had been secured. The first actions were oriented towards setting up learning sessions. Previously, these had been called 'training workshops', but the team realised that this term was inappropriate because what was actually going on was an *exchange* of knowledge between local and external actors; hence the name 'learning sessions'.

Learning sessions were carried out for each of the activities. Generally speaking they were included in the regular monthly meetings of the communities. Parallel to this, the field workers regularly joined in with the families of the community and their activities, the intention being to reinforce what had been developed in the learning sessions. To this end we recorded the results of this process of sharing. The results that came from the peasants were recorded in the form of 'information-sheets to revitalise local knowledge'. The results that came from the field workers were recorded as 'information-sheets to disseminate experience', or small informative handbills on topics such as the preparation of organic mulch, small-animal husbandry, or pruning of fruit trees.

Occasionally, and at request of the families of the communities, specific workshops were held on political and social topics of national impact, which were of interest to the communities. These events consisted of a talk on a particular subject usually given by the field technicians (for example, the state call to create supervisory committees for municipal governments), followed by a broad debate and discussion on the topic, and finally draft conclusions written down by the secretary of the community organisation, which were later sent to the boards of regional organisations of peasants.

The techniques we used that pertain to the social sphere are:

- learning sessions;
- political-social debate workshops;
- support to families by joining in with their activities;
- information-sheets to revitalise knowledge and disseminate experience.

Techniques used in the spiritual arena

On key dates in the community calendar, we performed collective or family rituals, depending on the significance of the date. When it was a question of initiating an agricultural activity (for example, planting vegetables for product diversification to ensure food security), or weeding potato or maize crops, the family performed the rituals. For collective activities concerning the whole community, which were not necessarily agricultural ones, everyone participated in the rituals. The technical team always provided the supplies for these.

We counted at least ten family rituals and seven collective ones that took place in the space of one year. Collective rituals were carried out to honour the dead, plants, trees, rivers and protective mountains. In the process of sharing with the communities, we learned that rituality and spirituality were much important than we had previously understood.

During the time spent with families, when knowledge about specific topics related to the project (e.g. conservation of soils, agroforestry) was exchanged, we observed that the communities' space is delimited by sacred or 'forbidden' areas (*sajras* in the local language), where caution is prescribed. Before walking or resting in these places, permission must first be asked from the spirits of the place. Requesting permission is a personal act and is done in silence, preferably while chewing coca leaves. The latter offers protection against evil spirits that may cause physical damage (such as pain in some part of the body) or psychological damage (discomfort, depression, nostalgia, inexplicable tiredness). Our tools were asking for permission to move around in the area and chewing coca leaves. These had good results, as we suffered no physical or spiritual sickness.

The techniques we used that pertain to the spiritual sphere are:

- family and collective rituals;
- asking for permission in sacred places;
- chewing coca leaves constantly;
- an attitude of respect towards the people and the natural environment.

Table 3. Techniques most commonly used during project implementation

Technique	**Aspects common to endogenous development and the participative approach**	**Aspects where endogenous development differs from the participative approach**
Learning sessions	Demonstrating appropriate, locally adapted techniques for implementing a particular activity. Explaining and discussing them, arriving at conclusions based on local perceptions.	Technical personnel also learn much from the community. Being open to learning from the community and reaching agreements that are compatible with the community's own rhythms and material possibilities.
Info-sheets for revitalising local knowledge	Collecting local knowledge.	Disseminating and validating local knowledge in learning sessions. Reconstructing and giving it a collective value, thus increasing community's self-esteem.
Info-sheets for disseminating experience	Dissemination leaflets with basic teaching elements: photos, figures and simple words.	Materials developed from local perspective, with examples from community's own reality. Systematic presentation and dissemination of successful local experiences of a technique provided by the AGRUCO team.
Meetings for political/social debate	Presentation of a topic of local interest. Questions and answers.	Presentation of a topic, on which community debates and determines its position. Position taken then disseminated in higher peasant management circles.
Family and collective rituals	Respect for local rituals and practices. Matching project activities to rhythm of local rituals.	Encouragement of ritual practices as a mechanism for cultural revalidation; building confidence between locals and outsiders. Project activities are guided by ritual calendar.
Chewing coca leaves	Sharing with the community and showing respect towards local practices.	Sharing, fraternisation and spiritual connection, creating moments to talk about daily themes in a friendly and informal way.
Attitude of respect towards environment	Not going against local social etiquette and rituals; respecting them and adapting to them.	Participating in revalidation of social and cultural protocols. Adapting to them and trying to understand them as central to community development.

Technique	Aspects common to endogenous development and the participative approach	Aspects where endogenous development differs from the participative approach
Demonstration areas in zones/sectors	Participatory development of technologies.	Participatory development of technologies appropriate to each ecological niche in community, and to family potentials and limitations.
Shared experience (*accompañiamento*)	Incorporation of family dynamics in implementation of a particular technology.	Participation, revalidation, mutual learning and cooperative in developing production technologies.

Techniques used in the material arena

Demonstration plots and model installations on some families' land were used to increase understanding of practices such as soil conservation, agroforestry plantations, setting up infrastructure for small-animal husbandry, vegetable crops, disease and pest control. Although these techniques come from other research and development streams, we found them useful because they are very practical and didactical ways of sharing knowledge.

Generally, the community is divided into sectors according to social criteria (clans or family groups), or geographic criteria (ecological niches, highlands, midlands or lowlands). Demonstration plots and model installations were set up in each one of these areas, with the participation of the families in that area. Didactically, we had already learned with other communities that it is not possible to work with too large groups. The ideal number of people is about ten. We found that adopting the community's sectors (which reflect the traditional productive and organisational system of the community itself) was helpful.

After seeing what was going on in demonstration areas, each family replicated the work on their own family areas. Our role was to share in the experiences of the families and to provide technical guidance when necessary. Support was provided not only during specific activities of the project but also for daily activities like grazing and weeding of plots.

Although the technique of support through intensive sharing and working together (*acompañiamento* in Spanish) helps to deepen relationships, and helps actors to get to know each other better and gain better understanding of living conditions in the community, we found it to be very restrictive. It only directly involves a small number of families in the community. Sometimes this issue caused jealousy between families, or people thought that we, as technicians were biased towards or had 'business' interests with certain families, and that this was why we used this *acompañiamento* technique with specific people. However, both our work providing support to some families and the criteria for selection were based on chance, not on personal empathy. We solved the problem by decreasing the time we shared with the families whose participation in the project activities had become 'consolidated', and started to work with families that asked for more support and *acompañiamento* .

During this process of *acompañiamento* the families involved in the implementation of the project activities, we encountered common problems, such as calculating the application doses for natural insecticides, or the quality of soil conservation work. To solve these problems, and concluding that they may well occur

in most families, we referred to them regularly in the monthly meetings where we tried to provide clarification and solutions.

In conclusion, the techniques we used that pertain to the spiritual sphere are:

- learning sessions;
- experiences in demonstration areas (plots and facilities);
- division of the community into social and ecological zones;
- provision of support (*acompañiamento*) for families.

In general terms, project implementation consisted of gaining deep confidence (trust, friendship), respecting the other's values, and above all learning a lot from the communities, not only through info-sheets for revitalising knowledge, but also from working collectively, decision making, from their rituality and from the high interest in improving the conditions of agricultural production. We hope that they have also learned from us not just how to construct terraces and how to do biological pest and disease control, but, rather that there are technical staff who are committed to their culture, rituality, and social and economic expectations. We learned that their future is our future (*Ubuntu*, in the words of our African brothers).

4. Monitoring and evaluation during the course of the project

All the activities were conducted in a spirit of participation, mutual learning, revitalising knowledge, co-responsibility, respect and trust concerning rituals and cultural identity. After three years of implementing the project, it was time to evaluate the results achieved through the field activities.

As time passed, we came to realise that the informal and casual moments of social contact, and especially the community's own initiative in carrying out some activities, are good indicators of the degree of positive validation given to AGRUCO's work by the communities, as well as their willingness to execute a project.

The project assessment consisted of two elements: interviews with families and measurement of goals accomplished. The community leaders assessed the extent to which each family had achieved the established objectives. We interviewed the families, focusing on the opinions they expressed about the field activities and about other more crucial elements, such as AGRUCO'S work and behaviour in the community. The families were asked to classify which they regarded as most important, which had worked better for them and which ones had not.

About 20% of the families in the community were interviewed. These were chosen at random. We transcribed the results of the interviews and presented these at a regular community meeting. The leaders also presented the results of their measurement of the physical progress of the work and the degree to which the goals set out at the beginning had been achieved.

We set out both the initial aims and the results of the measurements and interviews concerning the achievements. The families voiced their opinions about the results, in some cases justifying delays and lack of progress, and in others highlighting the most important achievements. The result of the discussion was interesting. The conclusion was that the most important learning point in the process was the need for a strong social organisation to support and if possible conduct projects which would be productive, so as not to be too dependent on outsiders.

Another conclusion was that achievement of the objectives had been possible because they were based on local practices, on the experiences of the families themselves, with the help of the technical team on specific points.

While the communities may not have emerged from their material poverty, nor achieved all of the millennium development goals, they *have* begun a process whereby the area under organic cultivation, the area conserved, the amount of planting done or the number of small animals produced are no longer the most important factor, but rather the understanding that their own abilities, culture and way of doing things are not bad and are not the cause of their poverty. And that these form the basis from which to start out on the path towards wellbeing. Increasing self-esteem turned out to be the best outcome achieved, rather than accomplishing the aims and objectives initially proposed.

Conclusions: self-esteem and cultural identity

In racist societies such as that of Bolivia, where backwardness, poverty and ignorance are associated with the indigenous worldview and this prejudice is transmitted through the educational system, the media and monotheistic religions (which have their own chosen people), it is common to find indigenous communities, Catholic and poor, that believe their culture and knowledge are the causes of their poverty. They feel they have to learn from outsiders and behave like them, rejecting their own beliefs and identity, if they are to escape from poverty and social exclusion.

However, the most effective formula for overcoming these problems seems to be the opposite: to revalidate their knowledge, to reaffirm their cultural identity and to start a real two-way dialogue based on complementarity with outsiders, where neither party submits to or is subjugated by the other.

Following this line of thinking, activities were carried out that focused on reaffirming cultural identity and strengthening self-esteem. We produced information-sheets to revitalise knowledge, held collective discussions about the results and about the relevance of their 'scientific' verification. Other regular activities included reflecting on the origin, history and potential of the local culture, highlighting the values that are no longer found in Western culture, such as the preservation of community solidarity and the respect for nature as a living entity.

Another activity that helped cultural revalidation was our participation in and encouragement of the rituals surrounding the Pachamama (Mother Earth). This participation symbolises outsiders' appreciation of local rituality, and constituted a strong motivation for the communities. We emphasise here that the Pachamama rituals were not just another 'methodological step', but a sincere sign that the team shares common beliefs with the community.

Research was also carried out on peasants' fields, where local and external knowledge were combined. Very good results were obtained in pest control, increases in productivity and effectiveness of resource use. This way of working allowed community members to realise that outsiders appreciate their knowledge, and application of this knowledge results in productivity improvements. The exchange visits were also important experiences because the appreciation expressed by other communities of their own knowledge and experience, made the communities reassess and appreciate their own values.

The community's self-esteem regarding its culture and knowledge increased thanks to the frequent visits by university students, the peasants' participation in trade fairs in urban centres, and the recording of their knowledge in videos and publications. Above all, it was the outsiders' appreciation of the community members' knowledge and experiences that contributed to the latter's self-esteem.

The revalidation of local culture and knowledge is not framed within a paternalist or fundamentalist logic that highlights differences. On the contrary, endogenous knowledge, and the culture it comes from, offers more and better solutions for local problems when complemented by external elements, instead of simply converting peasants into 'farmers'. The view of indigenous peasants as being simple and ignorant was a consequence of the Green Revolution and other rural development policies, which rejected much of the endogenous knowledge that we have now come to recognise as valuable.

With regard to the community diagnosis and satisfying local expectations, we learned that it is good to measure the magnitude of the possibilities (financial and human) represented by outside actors at the start. This can prevent a situation from arising in which expectations are created that cannot be fulfilled in the time available. On the one hand, the community diagnosis makes evident the great needs in relation to the little help available. And on the other hand, it shows that local knowledge potential, natural resources and the essential work of strengthening local self-esteem are the keys for the development of indigenous peasant communities.

For sure, we did things that went against the grain of everything we had ever heard of and knew. In the AGRUCO project, cultural identity and the people's knowledge were not just recognised as being important, they formed the starting points for overcoming the community's problems, for the sustainability of their actions, and for their own initiative in implementing endogenous development.

India

FRLHT revives local health traditions

G. Hariramamurthi and P.M. Unnikrishnan

Background

In the 63 years since independence, India's achievements in healthcare have mostly benefited people living in urban areas. Around two-thirds of the public health facilities are concentrated in small towns and cities. Hence, many people who live in remotely situated rural villages are unable to make use of the public health services. Due to lack of disposable income, they are not able to afford the private health services either. The private sector has been in the forefront of healthcare delivery with around 80% of the population using it. Only 3% of the population has health insurance: the rest meet their health expenses through out of pocket spending. The Indian National Rural Health Mission (2005-2012) Document7 reports that over 25% of hospitalised Indians fall below the poverty line because of the hospital expenses they incur. This is an indication that conventional public and private health care services in India are creating new problems for its people, instead of solving health problems. Much of these conventional healthcare services are based on exogenous biomedical knowledge that is largely dependent on highly capital and technology intensive resources.

India has its own rich medical heritage, however. Traditional Indian medicine consists of two distinct knowledge streams: the codified and non-codified. The codified streams are Ayurveda, Siddha, Unani and Swarig-pa medicine and transmitted through formal education and training. The non-codified systems of folk medicine, such as those practised by local health practitioners of general medicine, bonesetters, birth attendants, paediatricians and ethno-veterinary practitioners, are mostly transferred orally from one generation to the next. The non-codified local health traditions are largely ethnic-community and ecosystem-specific. They are part of the cultural and spiritual traditions of the respective communities and use locally available medicinal plants from amongst 6200 medicinal plant species and diverse animal parts, metals and minerals. Many of the medicinal plants are used in spiritual and customary rituals and festivals.

India finds itself in a situation where local health practitioners have continued to practise through social legitimacy and community support, but have not been adequately recognised or utilised by the formal health system for delivering primary healthcare. In fact, there is no comprehensive plan to support local health practitioners or local health traditions, yet they continue to provide health services to the rural populations almost free of cost or, sometimes, supported by the beneficiaries. In simple monetary terms, if the Government were to pay even a symbolic monthly honorarium of Rs. 1000 to each of the one million local health practitioners, this would amount to a staggering sum of 20 million US dollars per year.

7 www.mohfw.nic.in/NRHM/Documents/Mission_Document.pdf

Unfortunately, many of these local health practices, which are highly relevant to the current health sector problems, are disappearing due to lack of social and policy support. Interest in learning about and practising local health traditions is waning, especially in rural areas. It is against this background that the Institute of Ayurveda and Integrative Medicine at the Foundation for Revitalisation of Local Health Traditions (FRLHT) designs and implements field programmes that demonstrate the relevance of mainstreaming an endogenous approach to a sustainable healthcare strategy, based on Indian medical heritage and building on local knowledge, skills and resources. The COMPAS network has been supporting this initiative since 1998.

The three thrust areas of FRLHT's work are:

- Conservation of natural resources used for traditional medicine
- Demonstrating the contemporary relevance of traditional knowledge
- Revitalisation of social processes for transmission of heritage

FRLHT has pioneered endogenous research, training and development processes related to traditional health sciences. It has built up a reputation in this field and has started collaborative activities with other research and development centres in India, including the Government and abroad.

FRLHT's approach to strengthening local health traditions

The cornerstone of FRLHT's approach is a programme called Documentation and Assessment of Local Health Traditions (DALHT), a set of methods applied to both human health and ethno-veterinary health practices. The basic objectives of this programme are twofold:

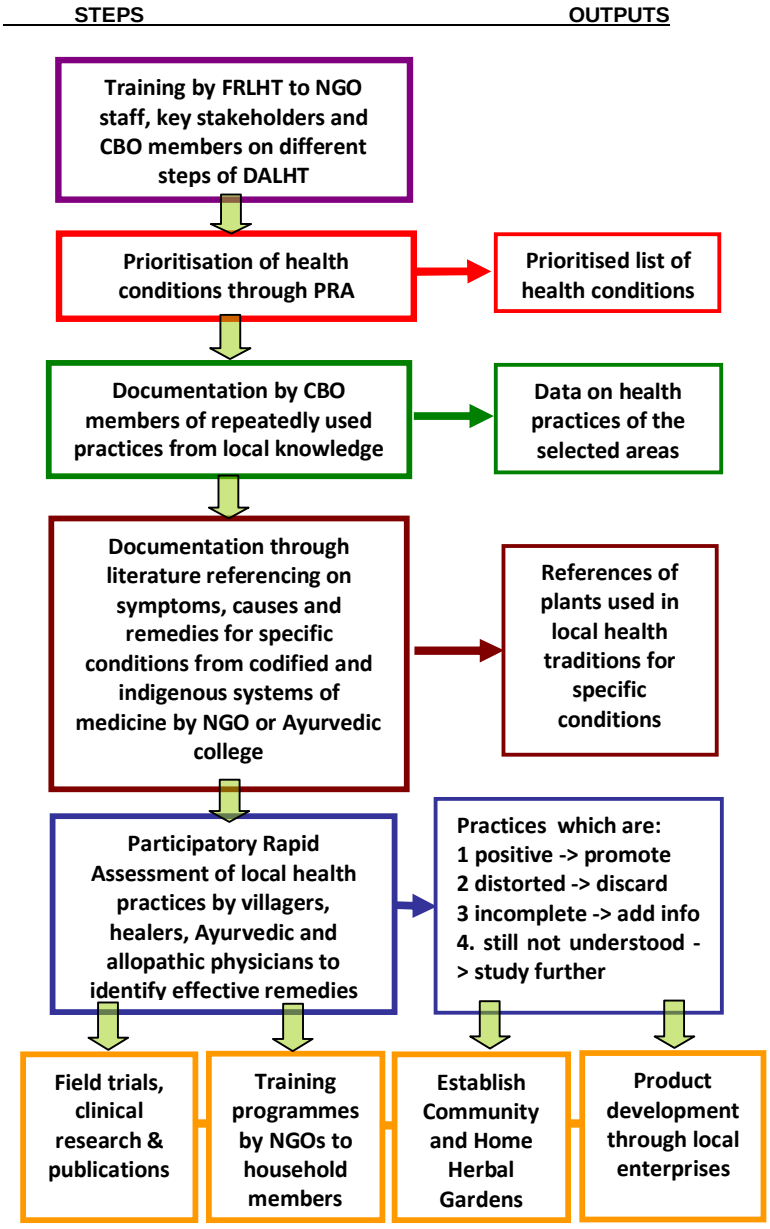
- Comprehensively identify, assess and revitalise local health practices that are of contemporary relevance.
- Protect such knowledge through documentation in the form of community knowledge registers (under the National Biodiversity Law) as well as promoting them as living social traditions.

We first summarise briefly the steps that FRLHT follows when implementing the DALHT programme with local organisations, and then describe in more detail the three training modules involved:

- What are Local Health Traditions?
- Documentation of Local Health Traditions
- How to do Rapid Assessment of Local Health Traditions

Finally, we describe how FRLHT takes its work a step further and promotes best traditional health practices, the Home Herbal Garden Programme being an example.

Steps taken for Documentation and Assessment of Local Health Traditions to help rural communities access healthcare at their doorsteps



Step 1. Before starting

FRLHT is approached regularly by organisations seeking support. In addition, FRLHT itself identifies geographical areas where it wants to work because of specific health challenges. An example is FRLHT's work on traditional anti-malarial treatments in Orissa, a region with a high prevalence of malaria and strong healing traditions. FRLHT works in partnership with non-governmental organisations (NGO) that are willing to design and implement field-based programmes through community-based organisations (CBO), where the NGO uses the key principles of endogenous development, i.e. applying local knowledge and resources for local needs.

Once a partner has been found, the process starts, beginning with training of trainers so that they can document and promote local health traditions among a wider public. In different sessions, NGO staff, key stakeholders and CBO members are trained in the steps that DALHT comprises. Examples of CBOs that receive training are folk healers associations, women's self-help groups, village watershed committees, and village forest protection committees. The flow chart provides a schematic overview of the DALHT process.

Step 2: Training of trainers

The training of trainers lasts three days. A typical group that will be training others in the DALHT process consists of a maximum of 10 NGO staff as well as key leaders and representatives of the CBO involved. The participants receive training in planning and implementation of the field programme: Baseline survey, Participatory prioritisation of health conditions, and Documentation, Assessment and Promotion of Local Health Traditions. During the sessions on local health traditions, aspects of endogenous development, such as building on local knowledge and resources, revitalisation of traditional knowledge holders and diversity of worldviews, are discussed.

Step 3: Baseline survey

Community members, usually youth, are trained to implement a baseline survey. The survey captures the extent to which local communities have belief or faith in their own knowledge and have resources to meet their primary health needs. It normally takes around two to three weeks for the youth to collect the data from the survey households and about a week or two to consolidate and analyse the findings. A standard format is used for the baseline survey to determine food habits, general practitioners, specific conditions, healer-specific practices and natural resources.

Step 4: Participatory prioritisation of health conditions

Folk healers (mostly men) and knowledgeable elderly women utilise Participatory Rural Appraisal (PRA) tools to map the available natural resources during a transect walk. In another session, community members list and prioritise their health problems using their own criteria. These criteria may include frequency of diseases, cost of treatment, effective home remedies and which remedies are women specific. A special category of 'women-specific conditions' is included, because in rural villages women tend to hide their ailments as most doctors working in rural primary health centres are men, and local cultural values prevent women from being open about such

complaints in public. Selection of problems follows a rigorous discussion among the community members facilitated by the local organisations. By the end of the exercise, the community has identified the top five to fifteen primary health conditions. It concludes with a situational analysis of problems of accessibility, availability and affordability of public and private health facilities to meet the healthcare needs of their households. External experts – Ayurvedic and allopathic doctors – join the process as passive observers.

Step 5: Documentation of local health practices

The next step is to conduct a comprehensive documentation with the healers and elderly women in the selected villages to gather complete information on the health practices used locally for the prioritised conditions. The documentation of healers is normally done by the same CBO members who did the baseline study. Normally, the documentation is carried out over a period of two to three consecutive days, and around 5 to 10 healers are interviewed. The local health practices are documented using a standard format of an interview schedule, which captures details about the healer or knowledgeable woman, such as name, and describes the health conditions, signs and symptoms, causes, diagnostic methods and prognosis, as well as treatment and administration of traditional herbal formulations prepared and administered to manage the prioritised health conditions. The format also includes space for do's and don'ts of food and lifestyle regimen that will facilitate healing, for describing details on procedures for collection and/or purification of raw materials used in the preparation of herbal formulations. The knowledge documented is compiled into a Community Health Knowledge Register, a copy of which is released in a symbolic occasion involving the Biodiversity Management Committee or the Panchayat (Village level Governance System) and retained in the community.

The data on the documented traditional herbal remedies are then compiled along with references for their quality and action according to pharmacological parameters defined in the texts of codified systems of medicine such as Ayurveda, Siddha or Unani, and biomedicine. The desk research report is then presented to a collective assembly of all the stakeholders in a Workshop for participatory rapid assessment. The stakeholders include representatives of community members, knowledgeable women, traditional healers and practitioners of codified systems of medicine.

Step 6: Participatory rapid assessment workshop

In the workshop on Rapid Assessment of Local Health Traditions (RALHT) participatory methods of assessment are used to involve all relevant stakeholders. The exercise is called 'rapid' because it does not involve detailed laboratory or clinical studies. The participants are presented with the details of the documented remedies, along with the information regarding their quality and action based on textual references from texts of codified systems of medicine mentioned above. They then discuss the safety and efficacy of use of these remedies for the selected condition, based on their empirical evidence, supported by clinical experience of healers and practitioners of codified systems of medicine. Local health practices that are considered to be safe and efficacious are recommended for wider promotion. Some of the practices that had not been fully documented are made complete with inputs

provided by folk medicine healers and practitioners of codified systems of medicine. The practices that lack empirical evidence are kept aside for further study, while the distorted practices are discouraged.

Step 7: Promotion of local health traditions

Remedies with strong empirical evidence from the community and the folk healers are now promoted, irrespective of whether they receive support from other medical systems. Methods of promotion are:

- field trials, clinical research and publication
- training programmes by the NGO to household members. For example
  - Home Herbal Garden programmes
  - Product development through local enterprises

Training on local health traditions in more detail

FRLHT's approach to assessing the safety and efficacy of health practices has been evolved from research based on Indian codified systems of medicine, which have developed through the centuries out of these local health practices. Both the codified and non-codified streams of medicine share a common worldview, based on a holistic concept.

In this holistic worldview, all living beings - the microcosm, consisting of plants, animals and human beings - share principal elements with the outside world - the macrocosm. These five principal elements consist of the earth, water, fire, wind and ether, and are referred to as *pancha mahaboothas*. According to the philosophical foundation of Ayurveda, one of the codified systems of medicine, the means of knowledge are verbal testimony (*apta*), direct perception (*pratyaksha*), inference (*anumana*) and analogy (*upamana*). In Ayurvedic pharmacology (*Dravyaguna sastra*), the plant and/or its parts (leaves, stem, roots, bark, flowers, fruits and seeds) are studied as a whole in terms of parameters such as taste (*Rasa*), character or quality (*Guna*), potency (*Veerya*), post-digestive state (*Vipaka*) and unique biological activity (*Prabhava*). Each of these parameters indicates a biological and therapeutic activity.

Even though the logic of local health traditions lacks the theoretical rigour of Ayurveda or biomedicine, there is an inherent relationship between classical textual knowledge and local health traditions. Unlike the worldview and the theoretical foundation of western biomedicine, which provides a structural and reductionist understanding of nature, the Indian codified medical traditions and the non-codified stream of local health traditions share a common worldview. This common worldview relates to the deep understanding of natural processes (and health), through a complex web of influences generated by ecosystem, cultural histories and spiritual understanding of human-nature relationships. This makes it possible to formulate an endogenous approach to assess the safety and efficacy of local health traditions, which makes use of the understanding of health in the codified tradition. The common worldview also enables promotion of solutions to health problems on a large scale, in a cost effective manner that requires little time and is affordable to a resource poor country such as India.

Folk healing traditions are seemingly informal traditions that exist in ethnic and traditional communities. They include practices conducted by folk healers, home

remedies, customs and rituals that are passed on over generations. In the Indian tradition, household traditions and folk healers are the two levels where the folk health traditions exist. At household level they take the form of daily diet, food for different occasions, and household remedies for illnesses. At the more specialised and professional level, local health traditions are represented by folk healers including bonesetters, poison healers, ethno-veterinarians and traditional birth attendants.

Box 1. First Module: Local Health Traditions

Session 1: Understanding Indian medical heritage from the participants' own experiences.
Participants do a free listing of folk healers whom they know as health care providers in their community
Analyze this information by putting healers under the various streams of health care. In India, this can be Ayurveda, Siddha, Unani or Swarig-pa (Tibetan) healers; folk healers like bonesetters, birth attendants, paediatricians or ethno-veterinary practitioners; or a western bio-medical doctor.

Session 2: Understanding codified system of Indian medical heritage
a. Presentation by physicians from the different medical traditions who explain their healing practice
b. Analyzing ancient medical texts and properties of medicinal plants
c. Demonstration of certain medical diagnostic or curative practices by practitioners of different medical traditions

Session 3: Understanding non-codified systems of Indian medical heritage
a. Presentation by folk healers who provide health services to the local communities with their healing practice
b. Demonstration of certain medical diagnostic or curative practices
c. Field visit to understand how a folk healer practices his profession

Session 4: Understanding natural resources used in local health traditions
a. Ask participants to list plant and animal resources used in their region for medical purposes
b. Possibly arrange natural resources related to health conditions

Session 5: Understanding cultural resources used in local health traditions
a. Exploration of participants' understanding of worldviews - assumed relationships between material, social and spiritual dimensions in their tradition: what is health; how is healing perceived; how are healing properties of medicinal plants understood; how are taste, potency, appearance and other characteristics expressions of the nomenclature of folk knowledge; importance of life style and relation to the spiritual world; how healing knowledge is transmitted; how healers are embedded in the community.
b. Discussion on how the material, social and spiritual aspects interact in the context of healing in the ethnic community of the target group
c. Discussion on appreciation of the diversity of cultural knowledge and possible complementarities of western biomedicine, codified traditions and local health traditions in sustainable health care.

Session 6: The promise of local health traditions for sustainable health care
a. Presentation on promise of local health traditions to deliver health security in rural communities
b. Presentation and discussion of positive aspects and challenges of local health traditions and western bio-medicine: efficacy, research support, economics
c. Discussion of the promise of local health traditions in the communities of the participants

Documentation of local health traditions

Documentation is the systematic collection and recording of hitherto unwritten knowledge. This knowledge may relate to natural resources used, practices followed, belief systems related to healing, cultural resources and social processes of revitalisation of traditional knowledge. A comprehensive documentation of local health traditions will include knowledge on diseases, natural resources and aspects of health traditions.

Whereas local health traditions are still transmitted through oral narration of histories and songs, and a teacher-student relation, socio-political developments are leading to a rapid decline of healing traditions. A considerable amount of knowledge is being lost due to inadequate transmission of traditional health care knowledge.

Before documenting any knowledge, it is necessary to obtain free, prior informed consent and to conform to certain ethical norms, such as benefit sharing and source acknowledgement, when using data. If the knowledge obtained belongs to a specific community, e.g. a group of healers, a Biocultural Community Protocol may be a helpful document. It can act as a fair and transparent instrument to enable the knowledge providers to state their own terms and conditions for sharing the knowledge with the receiver of such traditional knowledge.

The report of the documented remedies is compiled in the local language before being released as a Community Health Knowledge Register in a symbolic public event marked by the presence of village leaders and local health and/or forest department officials.

Box 2. Second Module: Documentation of Local Health Traditions

Session 1: Need for documentation

a. Discussion on combating erosion of oral traditions
b. Introduction to intellectual property rights, prior informed consent and benefit sharing arrangements

Session 2: Ethics related to documentation

a. Discussion on protecting traditional knowledge
b. Presentation of agreement for seeking approval of healers to document and assess their knowledge
c. Introduce other tools for protecting traditional knowledge, e.g. Bio-cultural Community Protocols
d. Discuss guidelines for data collection: preparation, timing, etiquette, explaining reasons, how to begin, who should be the informants, confirming clarity of data, checking authenticity of data, 'good' and 'bad' practices in data collection, gender sensitive questioning, culture and worldview sensitive questioning

Session 3: Methods of documentation

a. Present and discuss appropriate participatory documentation tools such as questionnaires, interviews, focus group discussions, transect walks, participatory ranking tools to assess health conditions or effectiveness of remedies among community members, using audio visual tools, herbarium and specimen collection
b. Sample exercises in the training: prepare and test a questionnaire; role play on interviews to discuss how to pose (open) questions; do a transect walk in the village; formulate a matrix and do a ranking exercise; collect, dry and press plants for a herbarium.
c. Clarify how to analyse data and how to write a report
d. Share and discuss sample forms of Prior Informed Consent

Rapid Assessment of Local Health Traditions (RALHT)

There are various reasons to assess local health traditions. Many are eroding at an alarming rate. Reasons include changes in life style, such as food habits, over-dependency on modern medicine – even in rural areas, depletion of natural resources, and a dwindling number of recruits to the traditional healing practice. Political and social attitudes towards Local Health Traditions are not always positive, which contributes to a decrease in self-confidence in users and practitioners. Assessment of practices determines their safety and efficacy. Practices that are widely used in the community can be taken up for further promotion. Assessment differentiates the sound from the unsound practices, and the results can be used to convince people who believe only in 'scientific' proof of efficacy.

Several illnesses are likely to be prevalent in any community. However, there is a group of primary conditions that are more prevalent than others. These are usually conditions upon which the largest amounts of money are spent. Rapid Assessment of Local Health Traditions (RALHT) identifies the conditions that need most immediate attention. Health conditions are ranked, causes and symptoms are recorded, remedies are recorded, and finally resources used for remedies are recorded and specimen collected.

The complete set of documented data is taken for desk research to look for supporting literature evidence pertaining to the safety and efficacy of the remedies. This desk research is conducted by a group of health practitioners who practice in the vicinity of the community or NGO.

The RALHT workshop is a community level workshop in which ideally one practitioner from each of the Indian Systems of Medicine (Ayurveda, Siddha, Unani and Swarig-pa (Tibetan) medicine), a western biomedical doctors, and a botanist join in with the community members and folk healers to discuss the conditions, confirm the resources used for the medicine and present their assessment of the safety and efficacy of the practice. Out of such a RALHT workshop, an analysis chart emerges, allowing conclusions to be drawn about which safe and efficacious remedies can be taken up for promotion, which remedies cannot be recommended or commented upon and need further research, and which remedies have no empirical evidence.

Box 3. Third Module: Rapid Assessment of Local Health Traditions

Session 1: Prioritisation of health conditions and remedies

a. List health conditions in a community meeting. For example: What health problems do women face? Or men? Or children? Or the elderly? List the conditions mentioned by the community in the local language on a large piece of paper. Allow the community or local healer to explain the disease in their own terms. When listing down the illness, do not interpret it but list it in the manner it is mentioned. Give enough time for the community and folk healers to discuss among themselves so as to come to a satisfactory list of prevalent conditions.
b. Prioritise health conditions. Allow the community and local healer(s) to choose the health conditions according to their perception of what is important. List down community's criteria for selecting the conditions, such as: commonality, causing economic loss, frequency, treatable with local remedies. Do a ranking exercise with a matrix showing conditions and criteria. The community gives scores, for example from 1 to 5, using local resources such as pebbles for ranking.

Criteria Condition	Unbearable	Mentally worried	Number of household remedies available	Contagious	Frequently occurring in children	Total
Indigestion	*****	***			*****	13
Headache	***	**	****		**	11
Toothache	*****		****			9

c. Record causes and symptoms. Use a simple format table that lists per condition: symptom, stages, causes, other details (if any).
d. Record remedies. Use a simple table to list remedies: local name of the health condition, ingredients (parts used/portion used), preparation, mode of administration, how much/how many times/how long? Do's/don'ts? How effective is it? Still in use today?
e. Record and collect specimen of resources used. Use a simple table to describe: specimen no., local name of the resource, botanical name, habit, collected from.
f. Process report. Describe in a report how the workshop took place, people attending, profile of participants, results from the different sessions. The facilitators' analysis and interpretations should come at the end. Share it with community members who can read.

Session 2: Desk Research

a. Copies of data sheets on causes and symptoms and on remedies are forwarded to medical practitioners from Indian Systems of Medicine. A reference format is developed for Ayurveda, Siddha and Unani assessment and western biomedicine of causes and remedies.
b. Pharmacologists are asked to indicate active constituents, biological activity, clinical reports, remarks and references.
c. Botanists are asked to identify plants that need clarification.
d. In a report, the interpretations of Indian Systems of Medicine and western biomedicine are presented: pharmacological analysis of ingredients of the remedies, leading to conclusions on safety and efficacy.

Session 3: Rapid Assessment Workshop

a. Different stakeholder groups involved in previous sessions are invited for the workshop. Participants normally consist of medical practitioners from Indian Systems of Medicine and western biomedicine, botanists, community members, folk healers and facilitators. The facilitators inform the stakeholder groups on the workshop process and their expected role.
b. Expected roles of the community: to give comments on the remedies to be promoted on the basis of the health tradition and worldview they represent, and to correct identification of the resources used by them, if needed. The practitioner groups are expected to comment on the community's practices based on their worldview, clinical practices, botanical understanding and personal experiences after adequate introduction and interaction with the community.
c. The prioritised list of health conditions is presented to the panel of practitioners present. The panel discusses with the community (in case of household remedies) and with folk healers (in case of folk remedies). The members of the panel fill their respective LHT data sheets
d. The practitioners present the data sheet to the other workshop participants (in writing or reading).

e. Discussion of the condition, summarised in a table:

Condition	Local healer	Ayurveda	Siddha	Unani	Western biomedicine
Causes					
Symptoms					
Others					
Conclusion					
Experts name					

f. Confirmation of resources used in a table
g. Details on preparation and dosage of medication in a table.
h. Effectiveness of the practice as judged by the community and the folk healers and by the practitioners of Indian Systems of Medicine and western biomedicine

Practice	Folk Healers	Community
Effect		
Affordability		
Availability of resource		

Practice	Ayurveda	Siddha	Unani	Western biomedicine
Comments on effect				
Why?				
Is this a safe remedy?				
Expert's name				

i. Conclusion using an analysis chart, through which agreement is reached on a set of remedies that are effective, remedies that cannot be commented on or recommended, and remedies with no comments.

Remedies assessed	No. 1	No. 2	No. 3	No. 4	No. 5	No. 6	No. 7	No. 8	No. 9	No. 10
Community	√	√	√	√	√	√	√	√	√	•
Folk healer	√	√	√	√			√	√	√	
Ayurveda practitioner	√	√	√	√					√	√
Siddha practitioner	√	√		√					√	√
Unani practitioner	√	√		√					√	√
Western biomedicine practitioner	√	√								
Assessment: P□m□tion	√	√	√	√		√	√	√	√	
Remarks						Further research needed			Further research needed	

• = No comments
= cannot recommend / cannot comment
√ = can be recommended / can be promoted

Promotion of local health traditions: Home Herbal Gardens

Remedies with strong empirical evidence from the community and the folk healers are now promoted, irrespective of whether they receive support from other medical systems. Distorted practices are discouraged. Remedies with strong positive empirical evidence from the communities, but negative assessment from the other medical systems, are subjected to further research among the communities. This category is referred to as 'data-deficient'. The remedies that have been selected positively are subjected to rapid pre-clinical trials in the rural locality, with the active involvement of folk healers, community and representatives from different medical traditions. In each cluster of villages, around 15-20 medicinal plants are selected from the positively assessed home remedies documented for the health conditions prioritised by the community. The NGO then recommends that the local households plant them in their home herbal gardens, as a step towards promoting local health traditions.

The households themselves establish Home Herbal Gardens (HHGs) to ensure the ready availability of medicinal plants for use as and when required. Village Resource Persons called *Grama Arogya Mithras* are selected from the village household women who are literate. They receive training once a fortnight from the NGO on how to discuss problems related to maintaining the home herbal gardens, such as lack of water and grazing for cattle and providing solutions such as use of domestic waste water and fencing. They also are trained to train the household women in preparation and administration of home remedies for the top-priority primary health conditions. This is done through practical demonstrations, which are organised every two to three weeks.

The average household level of training and package containing 15-20 medicinal plant seedlings costs about Rs.150 (USD 3), if outreached to tens of thousands of households within a period of three to five years. This also includes the costs of raising and supplying plants to the households, training and the administrative costs of the CBO/NGO. The minimum benefit of annual savings in terms of primary healthcare related expenses through use of HHG is reported to be somewhere between Rs.150 and Rs.750 for one to five episodes of treatment costs incurred by an average family of 5 members.

The Home Herbal Garden programme contributes to poverty alleviation by reducing costs and indebtedness caused due to health expenditure. Several monitoring and review studies have also shown that the HHG programme is adopted by the poorest of the poor, namely the landless (33 percent), marginal landholding (37 percent) and small landholding (21 percent) farmers. At least 85 percent of adopters belong to the socially deprived communities, while 72 percent of the adopters were affiliated to women's self-help groups (Hariramamurthi et al, 2007).

The programme can also support local livelihoods as small-scale nurseries start and processing of medicinal plants becomes an activity. Network members (NGOs, CBOs and communities) confirm the economic benefits in the form of cost saving of health care related expenses. In the areas where HHG programmes have been active, visits to doctors have declined and local pharmacy shop entrepreneurs complain of reduction in their sales. The benefits from one HHG are reaped by not only the family members but by relatives, friends and neighbours also. Non-adopters of the programme start to use the raw materials from their adopter neighbours and thus

benefit too. Rural women with gynaecological problems have particularly benefitted from the programme, as they were previously reluctant to approach male doctors.

The conventional biomedical approach of pre-clinical laboratory and population-based clinical trials requires considerable financial resources and it is often many years before the safety and efficacy of local health practices can be confirmed. FRLHT uses its DALHT programme to document and assess the safety and efficacy of orally transmitted local health traditions. The methods used had to be acceptable to all the key stakeholders who adhere to divergent worldviews, such as community members, local health practitioners and knowledgeable women, civic society organisations as well as public health policy makers and implementers in and outside the government. Emphasis is placed on communities themselves being capable of promoting the use of safe and efficacious local health practices to meet their own primary health care priorities, as they have been doing in the past.

Quite a lot can be done to improve the DALHT programme including refining the validation processes and standardisation of form and dosage of HHG remedies. Since regular clinical trials are prohibitively expensive, novel, culturally and contextually sensitive 'participatory clinical trial' methodologies need to be developed to test the HHG solutions and rebuild confidence in traditional medicines. For this, a long-term public health strategy based on field experiences needs to be pursued, involving collective action by government departments, private institutions and non-governmental organisations at the national and state levels.

Whereas the initial DALHT process took three to four months, FRLHT has utilised the DALHT methods in recent years to look at specific diseases such as malaria, ethno-veterinary practices and anaemia. As it has been possible to reduce the time needed for participatory appraisal, the process now takes some two to three weeks.

Mainstreaming the endogenous approach

The DALHT set of methods, including the Home Herbal Garden (HHG) programme for promotion, is becoming integrated into a public health awareness and education programme through primary health centres and sub-centres in some locations. Similarly, the HHG programme was also initiated in southern districts of Karnataka with the support from the National Dairy Development Board to address the gaps in delivery of public veterinary healthcare services. The method that is used to prioritise home remedies is also being used to manage veterinary health problems of cattle, and Home Herbal Gardens can easily be designed to include herbs for veterinary and agriculture care.

As next immediate steps, it has been suggested that all the Accredited Social Health Activist (ASHA) workers and Auxiliary Nurse cum Midwives (ANMs) be trained in DALHT for five to ten high-priority conditions. This could be supported with the help of the Department of Ayurveda, Yoga, Unani, Siddha and Homeopathy (AYUSH, which is part of the Ministry of Health, Government of India) and Allopathic Colleges. FRLHT is lobbying to integrate the Home Herbal Garden and Community Herbal Garden Programmes through all the government supported Primary Healthcare Centres and Sub-Centres. Progress was made in 2010, when the Department of AYUSH established the North Eastern Institute of Folk Medicine in

the state of Arunachal Pradesh, where it is planning to implement the DALHT programme involving the folk healers and nodal institutions in the eight states of North Eastern India.

Similarly, a pilot intervention for documentation, rapid assessment and promotion of traditional recipes for management of iron deficiency anaemia, supported by the Department of AYUSH, has just begun in the tribal villages of Tirupathur Taluka of Vellore District. Folk healers associations and women's self-help groups are to be supported by the ASHA Workers and midwives, facilitated by the community based organisation, Tamil Nadu Parampariya Siddha Vaidya Maha Sangham (a Tamil Nadu State-level Apex Body of grassroots folk healers), in collaboration with the local Primary Health Centres, the Central Research Institute in Siddha, Government of India, in Chennai, and supported by Community Health Experts from the Christian Medical College, Vellore.

Similar experiments on DALHT for primary healthcare are in progress in Ramakuppam PHC and Paipalem PHC areas in Kuppam constituency of Andhra Pradesh. In these locations, the block level folk healers' associations and women's self-help groups are supported by the ASHA Workers and ANMs, facilitated by the grassroots NGOs Praja Abyudaya Samastha and Jana Abyudaya Seva Sanstha, where they are promoting the use of home remedies through Home Herbal Gardens as well as a participatory clinical study on the safety and efficacy of a herbal formulation based local health practice for management of iron deficiency anaemia.

In Orissa, prevention of malaria with the help of traditional anti-malarials is being clinically evaluated by FRLHT using the DALHT set of methods, and with the involvement and support from community based organisations and grassroots NGOs. In one intervention area of Dandapadia village in Orissa, the initial findings reported by the NGO partner, Sambandh, are very encouraging. While the control group (which used no malaria prevention drugs) reported 12 cases of malaria, only one case was reported amongst the volunteers that used traditional anti-malarials (Prakash & Unnikrishnan, 2007). Here the DALHT methods help us to explore the potential of malaria prophylaxis based on traditional, local health knowledge, which is easy to access, cheap and culturally more compatible with the people who reside in malaria endemic areas.

The above programme is being supported under the ETC COMPAS supported Programme for Community-led Natural Resource Management. In 2010, a training session was also organised in Uganda (hosted by PROMETRA Uganda), during which healers and researchers from five African countries were introduced to the DALHT methods.

These pilot experiments are expected to assist the government, private and NGO sectors in mainstreaming local health traditions as a public health strategy. Only through public-private partnerships will it be possible to deliver primary healthcare services to every household in rural India. Needless to say, such programmes would have to be supported through audio-visual and other media, including public and private TV. The know-how and do-how of safe and efficacious home remedies can, as kitchen recipes do in all cultures, begin to inspire the audience across rural and urban households in India. Every first use at the household level will spread the word of its efficacy in meeting the primary health needs of those not reached by the conventional

health care services. It is only with a multi-pronged public health strategy that it will be possible to achieve our dream of 'Health for All' in the near future in India.

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Peru

CEPROSI creates friendly and caring schools

Elena Pardo Castillo, Melquiades Quintasi Mamani & Guillermo Huahuatico Espinoza

Background

In places of official or formal education the prevailing authority, at the level of the educational institution (EI) and its curriculum, is the teacher. The reform, change, or simple maintenance of the status quo, of the curriculum in the kind of education controlled by the Peruvian state depends crucially on the attitude of the teacher. In this context, Peru, a culturally and linguistically diverse country, has an important legal framework, which permits the implementation of diverse inter-cultural and bilingual educational options, although it maintains a single National Curriculum Design (NCD). This NCD signals that *"… it will take into account human, cultural and linguistic diversity, expressed in the inter-cultural approach which characterises it and which is evident in the competences evaluated in the three levels of education and in the different areas of the curriculum, in relation to sociolinguistic contexts"* (MED, 2009). This description goes no further than the page on which it is written. This is evidenced in the adherence to modern learning in all curriculum areas and an exaggerated emphasis on development (material progress) based on individualism, technical reasoning and industrialisation as the only ways forward. On the other hand, no significant effort is made to implement policies that promote inter-cultural learning and culturally diverse societies in a serious and responsible way.

This matter becomes even more complex at the secondary education level, where teachers stay within the framework of their narrow modern specialisms, products of their own previous training. Consequently, the education given by teachers is theoretical, based on 'modern scientific knowledge', and irrelevant to the local reality. It does not incorporate local knowledge, much less encourage the participation of parents in educational activities. This is the result of an education, starting from the earliest school years, which values scientific learning only and rejects local wisdom that is expressed through the language and culture of the communities. The situation is exacerbated by the erosion of traditional cultures and lack of respect for community structure and customs; this lack of respect is expressed in the loss of values, ancestral wisdom and farming practices, a reduction in biodiversity and the despoiling of nature. The young now believe in nothing.

As a result, students, emerge from primary education ignorant of their own culture, language and other daily customs. Furthermore, they blame the culture of their parents and grandparents for their poverty and social situation. The education they receive does little to prepare these young people to cope with life in a diverse and developing society, be it urban or rural. What this education does do is individualise children, marginalising the importance of living together in harmony and of communal support and protection. In the face of this situation, a change in the attitudes of

teachers, educational authorities and parents is required in order to promote inter-cultural knowledge, with a view to generating endogenous development so as to achieve 'wellbeing' or 'living well' (*buen vivir*). This concept of wellbeing embraces the right to enjoy land and natural resources in a spirit of permanent reciprocity and the reaffirmation of the value of each community's own history, language, worldview, ethical values, justice system, medicine, technologies, food and religious practices.

The implication of this is that those involved must first acknowledge and appreciate their own cultural identity (cultural and linguistic loyalty), in order to subsequently embark on the process of inter-cultural opening towards the traditions and cultural expressions of other people that in fact may already be part of their own and their family's life. This contribution describes this process, as experienced by the NGO Centre for the Promotion of Inter-Cultural Wisdom (CEPROSI), in its work on education in the Andean highlands.

Principles of inter-cultural education

The work of CEPROSI is based on four main principles which facilitate wellbeing through an understanding of local culture and the realities of daily life. The key elements are the following:

1. Cultural affirmation through building affective bonds

This principle is based on the establishment of affection and respect in the relationships between humans, nature and spirituality.

In the Andean experience, learning is not only to do with the mind and reason, but also with the heart, feelings and perceptions. We do and we learn for the pleasure of doing, of sharing, of conversing, of learning and of developing affection during the process. *Pacha Mama* (Mother Earth) can be conceived of as a great mantle, in which each one of us is but one thread interwoven in a relationship of dialogue, affection and respect. Thus, the first prerequisite for learning, whether it be for children, teachers or anyone else, is the building of affective bonds.

The basic conditions necessary to generate bonding and learning are stimulation and an affectionate and harmonious environment. The twin paths of knowledge and affection work better when they interconnect, forming an *ayllu* (family group or community) of caring teachers, children and parents, where a relationship of harmony and cooperation develops and flourishes. Knowledge, therefore, does not lie in the individual but in the collective, the basis of which is the *kukay ayllu* (affective community). In this space everything is learnt, from everyone and by everyone.

Returning to our roots and affirming our culture allows us to develop affective bonds with nature and between people so as to recover the sense of belonging to a group or community (cultural and linguistic loyalty), and this applies to everyone involved – young people, parents, authorities and teachers alike. Acknowledging this means the acceptance of the person, family or community into the group to which they feel they belong. Cultural affirmation encompasses the recovery of affection and respect in several different spheres of communal life. The various spheres identified here are: the field/garden, the school, the community celebration, the exercise of authority and its changes, the exchanges and visits undertaken for sacred reasons and rituals between people, nature and the gods.

2. Nurturing agro-biodiversity

In the Andean view, agro-biodiversity is nurtured by cultivating the school, family and community *chacras* (cultivation areas) and through interaction with the local gods, Mother Earth and Mother Water, which help to raise crops, humans, wild animals and plants and to provide the tools which, all together, create wellbeing in accordance with the seasons of the year (marked by a ritual-agricultural calendar).

Cultivating the *chacra* is not just working the plot of land – it is the life of the whole community at any given moment. In our experience, participating in the *chakra* activities strengthens affection and respect between people, natural flora and fauna and the Andean gods, as well as reviving knowledge and learning between people of different ages throughout the community. In addition, there is the joy of songs, music and dancing, the sprouting of plants from seeds, celebrations, games and delicious food shared among all (humans, nature and gods). The goal of this activity is to foster and regenerate life and health, with enough food and using techniques that are not just for the benefit of humans, but also for the good of nature and the gods.

The *chacra* is the vital element for learning in the pursuit of a form of education that embraces cultural diversity for the children of the Andes. CEPROSI believes that learning about diversity in all its manifestations can be based on experiences derived from this natural classroom.

The *chacra*

- **Rituals**
- **Food**
- ***Chacra* authorities**
- **Knowledge of the productive process**
- **Music**
- **Traditional Dress**
- **Exchange of seeds**
- **Relationship of affection between visitors and hosts**

The *chacra* is the ideal place to recover and reinforce the aspects mentioned above. It is where the spirit or energy of Mother Earth and Mother Seed is summoned. It affords the wonderful experience of being able to enjoy each of the stages in the growing of crops, which involve the participation of girls, boys, women, men, the old, the young, nature and the Andean gods with emotion, affection, joy and respect.

The *chacra* is a place *par excellence* for intergenerational and interactive learning. Through the activities and rituals performed in this sacred place, many things become apparent: personal feelings, memories, dreams and identity of all generations are expressed through dialogue, shared happiness, affection, admiration and spontaneity.

We therefore conclude that, in order to establish an inclusive model of education, in which there is diversity, plurality and cultural hospitality, it is vital to reintroduce the *chacra* into school activities. It is not just a matter of applying rules, or learning about the theory of diversity, or simply reviving and revaluing indigenous languages. We believe that truly effective learning about diversity can only be achieved experientially, in the sacred natural classroom called the *chacra*.

We propose a return to nurturing cultural and biological diversity within the school by putting the school, family and community *chacras* at the core of the educational process. In our view, diversity in inter-cultural education has two dimensions: external, reaching out to knowledge from other traditions; and internal, deepening the awareness of one's own cultural identity. The challenge is to restore the *chacra* areas and turn them into educational resources that seamlessly link the work of the classroom with the wisdom that resides in the community.

3. Re-establishing harmony between teacher and community, in a relationship of affection and respect

The parents of schoolchildren complain that teachers know very little about the school and nothing about the community, that most of them arrive late, or not at all, and that they are in a hurry to leave so they don't miss the transport which takes them back to the cities where they come from. The teachers for their part declare that the community is not a pleasant place in which to work, that living conditions are deplorable and that there is nothing useful there for their intellectual and personal development.

It is easy to see that there is a lack of harmony between teachers and the parents of their students and each blames the other for the problems in this relationship, which does nothing for the education of the children.

To achieve education that is sympathetic to the culture of the students, it is necessary to start by repairing this broken relationship between teachers and parents. One way, but not the only one, to re-establish good teacher-parent relations is to use the school *chacra*, a clearly identified, specific location that calls for the participation of both teachers and parents. The *chacra* encourages the establishment of affective bonds between everyone involved, and the fruits of everyone's efforts are shared collectively. Re-establishing harmony between parents and teachers is an immediate imperative. Teachers, parents and children need to bond in a defined area that everyone feels is educationally beneficial.

In our experience, there is nothing else which generates such enthusiasm in children, teachers and parents as working together in the *chacra*, a place which brings out their affection and happiness and their appreciation of the earth and the living environment. For many teachers it is an extraordinary opportunity to experience at first hand the Andean biodiversity that Peruvians boast about so much, yet which so few of us get to know.

4. Recognition and critical acceptance of cultural diversity

This principle entails the recognition of cultural diversity, above all at local and national level, with some reference to the international. Our experience has shown that meeting regularly with people is important and necessary: to be able to identify, reflect on, feel and recognise in the flesh the reality of this diversity (different worldviews), at the personal and family level.

At the practical level, this means recognising the variety of ways of seeing the world and relating to it that different peoples or human groups have. The main worldviews found in our region are the Andean, the Western Judeo-Christian, and the Modern Western. These ways of seeing and interacting with the world coexist within us (to a greater or lesser extent in different people) and are implicit in many aspects of daily life. In workshops, the origins of these worldviews and the ways they affect how life is led are studied. The workshops promote the idea that the cultural aspects of diversity which lead to friendship and harmony, not just between different cultures but also with nature and the gods, should be treated with affection and respect; while the disharmonious aspects (individualism, despoiling of nature, rejection of spirituality (materialism), excessive use of chemicals, plastics) should be questioned and possibly even rejected. Intercultural relationships are best expressed in terms of relationships between equals.

The process of initiating, developing and sustaining an endogenous community activity

Step 1: Opening the hearts and minds of teachers and community members

Why was this done?

Endogenous development entails both revalidating what is already possessed and taking from external sources what is needed to generate improvements in wellbeing. In this context, recognising the value of what already exists, the local and communal Andean wisdom, is not always easy for everybody to accept. So, in order to ensure that this recognition and revalidation of local knowledge is effectively achieved, specific activities are undertaken in the *chacra,* together with visits to sacred sites and ceremonial rituals for the local spirits, shrines and the gods. These awareness-raising activities stimulate the opening of the hearts and minds of not only the participating teachers from the community school, but also many of the members of the community themselves.

How was this done?

The first step in working with the community was undertaken through the teachers and directors of the local primary and secondary schools. We had several meetings with them, during which we agreed to run a series of small workshops to promote certain handcrafts. The first activities chosen were weaving traditional scarves (*chalinas*), music, and the preparation of local food. The main participants in these workshops were students at secondary level, together with some primary level pupils and a number of parents from the community. During the workshops they were

encouraged to think about local culture and its importance in the life of the community.

During the second stage, with a degree of confidence derived from the first, school *chacras* were created (both primary and secondary) with the help of teachers, community authorities and the parents of students. The development of these school gardens created excellent opportunities to deepen the reflections of the participants about the ritual ceremonies and local customs involved in the regeneration of life through crops and the establishment of harmony between people, Mother Earth and the Sacred Mountains (Andean deities). Thus, the creation of the school gardens succeeded in bringing about the revalidation of the ritual dimension and the respective *chacra* authorities. But in other meetings the frailty of the spiritual element and a lack of commitment became evident. Faced with this, it was agreed to organise some journeys to ancestral ceremonial centres (Machu Picchu, Huchuy Qusqu, Tipon, Raqchi, Chinchero and Machu Pitumarca) in which we were accompanied especially by students' parents and some representatives of the local authorities.

Later, as a result of these shared experiences, the idea arose of reviving the ancestral *watunakuy*, or meetings for connecting and bonding. These encounters were useful not just for sharing Andean wisdom among diverse groups (delegations invited from various regions of the country and from other countries), but also to reflect on the efforts made by indigenous peoples, their organisations and other activists in defence of their rights and way of life, as well as discussion of other matters of concern to native peoples. The pervading atmosphere in these meetings was one of ritual (offerings to the deities and empathy between people and nature). The increased attendance at each successive bonding meeting (four in total) of people from different cultural and professional backgrounds was a clear indication of their effectiveness.

In our experience, visiting ancestral sacred sites with groups of pupils, teachers, parents and local authority figures is a critically important activity. Furthermore, it needs to be done on a regular basis in order to consolidate the positive changes in attitude and inter-cultural openness of the participants. In this way it can lead to a revalidation of local knowledge and increased confidence in and loyalty to local culture, while at the same time encouraging a critical openness towards other ways of seeing the world; something so essential for endogenous development.

The visits, and the observations of the heavenly bodies, were done in accordance with the Andean agro-astronomical ritual calendar.

At present, these efforts are being consolidated by setting up community organisations such as the 'House of Mother Maize' and the 'Council of the Wise'. To do this it was necessary to bring together groups of community members who cultivate their *chacras* in the traditional Andean style - at all times taking care that the organisation of these groups did not clash with the overall structure of authority within the community, but rather helped to strengthen it.

All of these elements contribute to opening the hearts and minds of teachers, community members, local authorities and visitors from outside. Once this opening has been achieved, it is important to implement the processes of inter-cultural education aimed at wellbeing presented in the first part of this contribution.

Step 2: Making worldviews explicit

Why was this done?

The importance of identifying the principal worldviews present within the context or scope of the activity is that through them it is possible to identify the appropriate type of development to propose. So any effort to modify the official curriculum (and to understand the type of development promoted by this), which governs the education of young people at secondary level, requires the study of worldviews. Doing so enables curricula to be introduced that have the inter-cultural openness favourable to endogenous development.

How was this done?

While the opening of hearts and minds was happening, workshops were conducted to identify and reflect on the different worldviews influencing the process, and based on this an inter-cultural curriculum was gradually constructed. The workshops consisted of meetings with teachers at the end of morning classes, and they were structured as follows:

- Welcome and introductions;
- Presentation of the topic in the form of an interactive dialogue;
- General discussion of the topic;
- Final outcomes in the form of a conclusion or group work.

Each of the workshops began with a fraternal lunch. Every workshop subtly invoked the recognition and affirmation of the cultural identity of each participant. As time passed, the majority of the teachers started to identify with and respect the local Andean vision. For a few of them this meant a real inter-cultural opening, as their personal cultural identity was distinct from the local one (although they didn't express this publicly).

The initial points of reflection and discussion were the environmental, social and spiritual crises threatening the world today. These problems were related to their work as teachers and the role they play, positive or negative, with regard to this situation. Next, they considered the different worldviews present in their immediate surroundings and the type of 'development', society, person and relationship with nature that these give rise to. These analyses were applied to the personal life of each teacher and the way they affected the education they provided for their students.

The principal worldviews examined were the Andean (present in certain aspects of family behaviour), the western Judeo-Christian (present in some family spiritual habits) and the modern 'Western' view (present in certain aspects of the relationship with nature and, above all, in the professional and academic life of the teacher).

This awareness of worldviews is important because understanding them is necessary to be able to embed inter-cultural relationships in the educational process. Without it, it is difficult to open up inter-cultural dialogues.

Step 3: Defining the changes in educational institutions

Why was this done?

Changes in several aspects of the schools were needed to ensure that the innovations brought in could be sustained. The modifications were introduced, and continue to be

introduced, progressively. The main elements are: institutional organisation, rules of social behaviour, the curriculum and the way it is implemented, and relationships with the community and parents.

How was this done?

Once hearts and minds had been opened, local worldviews had been understood and local culture had been reaffirmed (by teachers, parents and community authorities), the next step was to reach a consensus on the things to be changed or 'developed' and the educational areas and activities to be addressed. This was done through meetings attended by teachers and parents. The desired outcome was taken to be intra- and inter-cultural education, in other words, the implementation of educational processes that revalidate the local Andean way of life and promote a cautious openness towards the outside world and what comes from it. The areas to be addressed are listed in the table below.

Table 1. Changes in the educational institution

Areas	Type of change / 'development'	Aspects affected
Curriculum and its design	Intra- and inter-cultural educational innovations	• Intra- and inter-cultural learning • Incorporation of ritual and sacred dimensions to generate intra- and inter-cultural learning
Establishment of school gardens (*chacras*)	Conservation of local agro-biodiversity	• Participation of different generations in learning activities (intergenerational learning) • Incorporation of ritual and sacred dimensions in the cultivation of the school garden
Local authorities and good governance	Inclusion of local authorities and guardians of local wisdom in the education process Strengthening of good local governance	• Participatory management of curriculum design and of the conservation of agro-biodiversity • Acceptance of local Andean norms by the various players (students, teachers and parents)

Aspects that are to be changed must be agreed to and supported by the permanent teachers within the school. In many Peruvian educational institutions there are a lot of contract teachers who only stay at the institution for as long as their contract lasts. This means that every year there are new teachers who have to be brought into the process. For this reason, the support of the permanent staff is vital in defining the institutional changes to be made.

The first source that was considered for generating the planned changes or 'developments' was the potential residing in local Andean wisdom and experience, based on traditional culture and rituals, collective and intergenerational participation and reciprocity.

Step 4: Investigating locally available resources

Why was this done?

Investigating locally available resources was done in order to assess the capabilities and limitations within the community for the task of initiating and sustaining the desired innovations.

How was this done?

Once the desired changes/developments had been clearly defined, it was necessary to evaluate the potential of locally available resources to successfully address each one. The first area considered was curriculum design, then the establishment of the school garden and finally the strengthening of local authorities to achieve good governance.

In participatory meetings, the local skills, technologies and spiritual practices were studied to see to what extent they could be harnessed in the process of bringing about the desired changes. The work is summarised below.

Table 2. Investigating local resources

Areas of change	Key questions	Local potential
Curriculum and its design	What local wisdom, knowledge and practices could be used to promote the change? Do they need to be recovered, strengthened, implemented or claimed as a right?	• Local teachers do not have the necessary skills • The community has no relevant experience • An external expert is needed
Establishment of school gardens (*chacras*)		• There is vast local experience in the conservation of agro-biodiversity • Local agricultural technology can be relied on • Much local wisdom still resides in the elders • Local Andean agriculture encompasses a ritual and sacred dimension • This aspect needs to be strengthened • One institution has a school garden, the other doesn't
Local authorities and good governance		• Local experience in the exercise of authority and good governance is eroding • There are some guardians of local wisdom who could help to recover and strengthen community governance and authority in the conservation of agro-biodiversity. If this is not possible, help will be sought from other communities • This aspect needs to be recovered and strengthened

As a result of these considerations, the weakest area was identified as that of the intra- and inter-cultural curriculum and its design. No local resources could be found to help achieve the desired changes in this field. Recognising this, it was agreed to bring in what sustainable endogenous development (SED) has to offer within the framework of inter-cultural openness. Solutions in the other areas were to be derived

from the local concept of wellbeing. It was also agreed to make efforts to recover and strengthen the elements of the local potential identified in the table above.

The investigation of local resources was important because it showed how much the community already had at its disposal and could count on to achieve the desired aims. This process encouraged commitment and mutual support.

Step 5: Identifying externally available resources and experts that could help

Why was this done?

The identification of externally available resources, in the form of knowledge, technologies and experts, is vital to complement the locally derived efforts in bringing about the desired changes. This a key aspect, which involves responsible inter-cultural openness, aimed at sustaining the proposed development.

How was this done?

At a meeting attended by teachers, students and community members, it was concluded that local resources did not exist in the area of designing an inter-cultural and bilingual curriculum.

At this point it was agreed that CEPROSI, an external organisation, should be brought in to provide support in this area, utilising its prior experience. This entailed the fusion of the sustainable endogenous development approach (used by CEPROSI) with the local Andean notion of wellbeing, in which the external sustainable endogenous development paradigm would become the interface for inter-cultural dialogue.

This experience showed that the initial search for wellbeing, although it revalidates and reaffirms local identities, may also require a significant contribution from outside. Life is a complex whole, shaped by the joint contributions of all living beings, working together in a fair and balanced way.

The analysis of the weakness is shown in the table below.

Table 3. Identifying external resources

Areas	SED as inter-cultural interface Key questions	External potential
Curriculum and its design	We need wisdom and knowledge from others What kind? Who from? How can we adopt it? From what point of view? How far will it be possible to make it 'our own'? Who decides?	• Inter-cultural and bilingual (IB) diversity in the curriculum • Designing an IB curriculum • Specialists in IB curriculum design • Empowering the process of curriculum design and development • Commitment of and participation by teachers, parents, educational authorities and students

During this phase it became accepted that external wisdom and knowledge could be incorporated in the attempt to generate the desired changes, in the form of an inter-cultural and bilingual curriculum. This process of responsible incorporation contributes enormously to the creation of inter-cultural ties between different viewpoints or ways of understanding and living life. In other words, it enriches inter-cultural dialogue and reduces conflicts that lead to exclusion.

In this way, local and external elements become pro-actively complementary, permitting an inter-cultural rapprochement, which generates forces that contribute to wellbeing beyond that which each could achieve in isolation. An inter-cultural curriculum design will promote education that encourages openness towards other viewpoints. If it is arrived at with the participation of the community, teachers, students and external contributors, the design will be viewed as 'ours' and legitimate.

Step 6: Formulating responsibilities and actions to achieve desired change

Why was this done?

Formulating responsibilities and the actions needed to achieve the desired change is important because it determines the energy with which the development will be pursued. This energy resides in individuals, teams and resources.

How was this done?

Once both the local and external resources to be applied to each area of change had been identified, another meeting was held to decide on the specific actions needed and who would be responsible for them. Once again, teachers and parents cooperated in the allocation of responsibilities and actions to be taken in pursuit of the desired changes.

This process took into account the two prevailing paradigms: endogenous development incorporating the inter-cultural element and the local 'wellbeing' approach contributing the intra-cultural part, together promoting a holistic type of development. The experience showed that it is possible to find ways of communicating between different development approaches, facilitating participation and support. In this case, the greatest opportunities for communication were found within the extended community of humans, nature and the gods (*ayllu*), within which other smaller communication zones such as the schools and the school gardens are reintroduced to the curriculum under the tutelage of both school and community authorities.

CEPROSI, as the external agent, acted as the mediator between the knowledge of inter-cultural curriculum design and the knowledge of local wellbeing present within the community.

The table on the next page shows the commitments and actions for each area.

Table 4. Commitments and actions for each area

Paradigms	Priority areas	Resources	Commitments / actions
Sustainable endogenous development (inter-cultural)	Curriculum and its design (experts, teachers, students and parents)	**External** IB diversity in the curriculum Designing an IB curriculum Empowering the process of curriculum design and development Commitment of and participation by teachers, parents, educational authorities and students	• Participatory development of the inter-cultural and bilingual (IB) curriculum • Implementation of IB educational innovations • Promotion of IB learning • Incorporation of ritual and sacred elements to generate intra- and inter-cultural learning • Promotion of participatory holistic experiences as occasions for intra- and inter-cultural learning
Local wellbeing (intra-cultural)	Implementation of the school garden (*chacra* authorities, parents, students and teachers)	**Local** Experience of conserving agro-biodiversity Experts in agro-biodiversity technology Presence of the guardians of local wisdom The ritual and sacred dimension of Andean agriculture (to be strengthened) School gardens (one school doesn't have one)	• Implementation of agro-biodiverse school gardens • Incorporation of inter-generational learning activities • Creation of participatory holistic experiences as occasions for intra- and inter-cultural learning
	Local authorities and good governance (Authorities, parents, students and teachers)	**Local** Local experience in the exercise of authority and good governance is eroding (to be strengthened) There are some guardians of local wisdom who could help to recover and strengthen community governance and authority in the conservation of agro-biodiversity Support from links with other communities This aspect needs to be recovered and strengthened	• Creation of a participatory management system for curriculum design and conservation of agro-biodiversity • Acceptance of local Andean norms by the various players (students, teachers and parents) • Creation of participatory holistic experiences in the development of the intra- and inter-cultural curriculum, in the functioning of local authorities and in the conservation of agro-biodiversity

Throughout this step, it is important that participatory holistic activities are undertaken on a regular basis. This refers to engaging in the activities of the *chacras*, both those of the family/community and of the school (participatory). These activities should be carried out incorporating all the local Andean rituals. These experiences combine the material, social and spiritual dimensions in such a way that the hearts and minds of all those involved are kept open (holistic).

For CEPROSI, participatory holistic activities were the most frequently used method for promoting wellbeing within the framework of inter-cultural sustainable endogenous development. Engaged in at the right times (according to the Andean sacred calendar), in the right places (local and ancestral ceremonial sites) and with the right people (wise local elders) these activities are the most rewarding experiences that the participants can have in the process of either affirming their cultural identity or raising their inter-cultural awareness.

An example of this process is the planting of the *chacras*. Planting or sowing, more than any other agricultural activity, has a supremely significant sense of ritual and interaction between humans, nature and the Andean and Christian gods. During this experience, the processes of cultural reaffirmation are manifested through communal efforts, as well as planned elements of the curriculum.

In the process of this developmental experience, the religious dimension of the work eventually provided the personal-social support that enabled the achievement of important advances within the sustainable endogenous framework. This dimension became the 'motor' for continuing along the path of wellbeing.

Step 7: Promoting wellbeing within the framework of endogenous development

The complementary combination of the two aspects of the task – that which can be done from within the community and that which it is necessary and possible to get from outside – will in time lead to better living conditions.

These improvements must be realised under the following conditions:

- Wellbeing is promoted in a framework of inter-cultural openness.
- The spiritual, material and social dimensions are present, at both the personal and collective level.
- The local is affirmed while incorporating the external in a sense of growth and willingness to share with others.

In conclusion

A number of changes have now been introduced in primary and secondary schools, intended to create 'friendly' or 'caring' schools. The curriculum is based on education that respects the different cultural traditions, own language and rituals. As a result of this, the primary language that children learn at school is Quechua, and Spanish is taught as the second language. The learning process takes into account the ritual calendar linked to the agricultural production cycle and festivals of the community. The guardians of local wisdom are involved in the development of the school garden, art, dance and music as well as preparing food. Parents are actively involved in their children's education process, and teachers (who may have come from elsewhere) are friendly and respectful of the different ways of living of the communities.

CEPROSI and the teachers, pupils and parents have come a long way, but the political context of Peru and the local conflicts remain an obstacle to the ideal becoming a reality.

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Ethiopia

PARIMA reintroduces controlled burning, a traditional range management practice

Getachew Gebru

Background

The use of fire, as a range management practice, was a long-standing practice in the Borana pastoral system before its ban in the late 1970s as part of the national forest and wildlife conservation strategy of Ethiopia. This national strategy was erroneously implemented in pastoral areas without properly considering its suitability for the conditions of rangeland ecosystems. According to Borana elders, the impacts of the fire ban have been disastrous. They believe that bush invasion, which is thought to be largely caused by the fire ban, has killed grass (and thus animal productivity), significantly reduced the number of herbivorous wildlife, substantially increased livestock loss to predators and widely exposed the community to poisonous snakes. The consequences of the fire ban may need to be considered along with the impacts of a variety of interventions such as water development, the growing external interference in the traditional system of self-rule, and other trends and shocks experienced in the last four decades.

An applied research project entitled Improving Pastoral Risk Management on East African Rangelands (PARIMA) established an outreach and action research unit in southern Ethiopia in 2000. One goal of the outreach unit was to recognise and revitalise the Borana system of range management, by using a participatory approach to help pastoral communities more rapidly identify appropriate interventions that could improve pastoral risk management processes and mitigate poverty. In this process, PARIMA established long-term partnerships that included local communities, non-governmental organisations and government agencies. The key role of the PARIMA outreach unit became one of acting as a catalyst for positive change.

In 2004, PARIMA began work on participatory rangeland management. Revitalising the use of fire as a range management tool was a key focus. The main thrust of this work is to support the Borana traditional institutions, and the underlying guiding principles are:

- Supporting husbandry systems that are based on livestock keepers' own innovative strategies, knowledge and resources, as well as their perception of wellbeing and improvement.
- Livestock keeping takes place within a complex cultural and agro-ecological whole, recognising the agricultural, economic, social, ecological, cultural and spiritual roles that it can play.
- Integrating local knowledge and resources with appropriate outside inputs, based on people's own culture and worldview.

This contribution outlines the process of understanding endogenous range management, understanding the pastoral communities' own worldview, and the steps followed in revitalising the use of fire as a range management practice. This also involved developing selection criteria and prioritising development actions, learning, experimenting and communication, coupled with self-reflection on the part of the development practitioners, and full participation of the local leadership structures.

Stage 1: Getting started

1. Recognising endogenous livestock development practices

The first step was to begin to understand, from meeting with the pastoral leaders, the spiritual connection of the natural resources management and to learn from the Borana- custodians of natural resources.

The study used a participatory approach, and in particular a participatory learning process. This involved a consultation process with pastoral specialists who are experts in managing natural resources, particularly water and grazing. We learned from the pastoral communities about how they manage natural resources and the challenges that have emerged. The most significant contribution of meeting with the pastoral communities was to learn that knowledge and appropriate practices of managing natural resources come from within the community, and there is a lot coming from them that development agents can build on. This also helped us to unlearn that knowledge and change only come from outside. The consultation process is also to assist the pastoral communities, local government agencies and others to understand each other's perspectives and to find common issues/goals. The meeting was a step forward for the pastoral communities in their search for greater empowerment and their participation in the planning and decision-making processes. The participants became more familiar with the pastoralists' indigenous knowledge and its importance in the process of decision-making for change and development. Overall, the meeting created an opportunity to look at the situation in a different way - considering the pastoralists' viewpoints.

A two-person team from PARIMA met and discussed with the district-level administration and natural resource experts, and the local NGO partners regarding meeting with members of pastoral communities. We indicated to them that the idea was to learn from the pastoral communities and engage ourselves in a process of learning and unlearning. This we explained would enable us to gain more understanding about how the system operates, and also to identify areas of entry to support the pastoral system. Our proposal for a meeting was accepted. PARIMA provided logistic support to government staff to attend the meeting. PARIMA had already been in close contact with the Borana for several years and therefore knew the key pastoral people to invite to attend the meeting. The pastoralists that were part of the grazing council were invited to the meeting.

A full day meeting was held with people from several villages (*ollas*), local government representatives and local NGO representatives. The purpose of the meeting was to give pastoralists the opportunity to share with us their experiences in managing their range resources and their worldviews. The meeting was held under the shade of a tree, a way of reconnecting with nature. A PARIMA member of staff was

facilitator. After welcoming everyone he asked one of the pastoral elders to open the meeting. The elder opened the meeting by conducting a ritual. This created space for ritual and is also a way of expressing cultural sensitivity. The facilitator then asked the members of the grazing council to share with the participants their worldview, range management practices, how the traditional institutions have become weakened and what has happened in the communities. A member of the Arada council - the grazing council - led the experience sharing process. The members of the *arada* council (who have not had any formal training and do not know how to read and write) made two oral presentations, including how water and grazing are managed. We learned from the presentations that the Borana traditional system is one that encompasses social, natural and spiritual aspects. To the Oromo people, of whom Borana pastoralists are part, the Supreme Being, *Waaqa* (God), is the creator of all things and the source of all life. *Waaqa* has appointed every being its place in a cosmic order, of which He is a guardian. Sin is simply breaking of this cosmic order. Every individual is supposed to observe the rules and regulations of the community so that *Waaqa* will not punish them for their sins. This is the essential element of the custodianship of natural resources bestowed on every Boran. To the Borana community, therefore, the banning of fire and the inability to use fire is considered as breaking the rules and regulations. The spiritual aspect of the Borana's range management practices was therefore a key message here conveyed to the actors engaged in range management interventions. These actors also had to learn more about the Borana *gada* system, which concerns the more fundamental aspects of how the Borana should live their lives, including their relationship with nature. The *gada* subsumes all other institutions, such as institutions for natural resources management.

Then the presenters, i.e. members of the grazing council, also talked about their prevailing concerns due to declining grazing resources and reduced mobility. The key issues were written down on a flip chart by the facilitator. The facilitator read out the recorded information to the pastoral representatives in the meeting to confirm with them that what they said had been recorded. This is respecting their views and it instils in the minds of the other participants a need for change of attitude for sharing and connecting.

The facilitator outlined key elements of the meeting as:

- The holistic nature of the endogenous range management practices;
- The weakening of the traditional system, but the opportunities that exist to strengthen it;
- The loss of grazing land to bush encroachment; main reason indicated to be the fire ban.

2. Prioritising development issues with traditional pastoral leaders

After five months PARIMA, the regional pastoral development office and the regional agricultural research institute facilitated a follow-up meeting. Held in 2005 at the pastoral and agro-pastoral research centre located in the zone capital, the meeting was attended by representatives of pastoral communities from eight lowland districts of the zone, with the aim of establishing development. The meeting lasted for two days and staff from PARIMA facilitated the problem prioritisation.

A modified Participatory Rural Appraisal-type approach was employed, where participants in three breakout groups were asked to list problems and priorities based

on pair-wise ranking. Important observers included district and zone administrators, and regional government office representatives. Each breakout group of pastoral representatives had a person who served as a reporter. The problems listed were read out one by one and the pastoral representatives were able to ensure that the problems had been recorded as they wanted them to be, and that these listings were understood well by the reporter. Once the listing had been done, participants endorsed the listing and went on to prioritise the problems, using a pair-wise ranking approach: the pastoral representatives, at any given time, compared two of the problems and indicated orally which one ranked top. Once the ranking was done, the complete listing of the rank was read out to the pastoral representatives for confirmation. This exercise came up with loss of forage supplies as the top priority problem.

PARIMA then facilitated further discussion to see what immediate action should be taken to address the prioritised problems. The major recommendation made by members of the pastoral communities to overcome the loss of forage grasses was that controlled fire, an endogenous range management tool, should be reintroduced into the system. The participants of the prioritisation workshop emphasised that lack of fire has been a major factor in the transformation of large areas of the Borana Plateau from mixed, grass-dominated savannah to situations dominated by woody vegetation. PARIMA learnt from this meeting that the history of the application of fire and the impact of the ban had to be documented.

3. Documenting and analyzing the history of fire and its ban

PARIMA staff documented the history of controlled burning and the impact of this having been banned. Data were generated by doing a field assessment survey in selected locations of two districts, where traditional fire use had been widely practised before the fire ban at the end of the 1970s. The data collection methods included focused group discussions, key informant interviews, field observation and document reviews. Key informant interviews and focused group discussions were conducted to generate qualitative data on the historical background of range fire, based on a semi-structured questionnaire prepared for this purpose. Secondary data (a review of documents, area of grazing land available, population distribution in the two districts and estimated livestock population), though few, were also collected. Prior to the start of the study, a consultative meeting was held at PARIMA Head Office, and later at field level, to refine and finalise the methodological approach and expected output and deliverables from the study. Key informants were identified on the basis of their organisational responsibility, positions at work, reputation and knowledge of the issues under consideration. Key informants were selected from representative government institutions (the zone pastoral and rural development office, Woreda pastoral development offices, represented by heads and relevant experts) and NGOs operating in the Borana area.

The focused group discussions (FGD), in which 8-12 elders participated, were held at two locations. The participants were well-known Borana elders, *abba reeras*, representatives of the community development committee, development agents and community representatives. The discussions took 3-4 hours at each site and were facilitated using a checklist. The study team used a local facilitator to organise the FGD meetings and arrangements for the semi-structured interviews with key

informants. PARIMA staff did the actual interviews. PARIMA liaised with the community leaders and identified the locations within the eight districts to carry out the documentation study, which resulted in a written document.

The documentation study revealed the major advantages of the use of fire, a local practice, as perceived by pastoral communities. In this case the use of fire as a traditional range management practice helped mainly in the control of bush, rangeland renewal (allowing new fresh and soft grasses to emerge and renewed pasturelands also attracted wild animals such as zebra, gazelle and ostrich), and was also an effective way of controlling ticks and predators. The members of the Borana communities indicated a strong desire to resume the use of fire, while indicating awareness of the existing difficulties that may need to be seriously considered for successful resumption of range fire in the region. The Borana have been forced to abandon the practice almost for a generation, a period of time in which the pastoralist habitat, the social system, and the economic and political conditions in their environment appear to have experienced significant shifts due to the underlying dynamic forces of change. The FGD participants believe that the use of fire still remains essential as one of the most important instruments for range rehabilitation in Borana rangelands.

Stage 2: Looking for entry points

Having done a prioritisation of the development problem followed by a detailed study to document the history of fire and impact of its ban, the next step for PARIMA was to bring the issue to the attention of the government decision-makers at different levels. Our thinking was that this development calls for institutional innovations and new arrangements for successful resumption of range fire in the area. For example, it might necessitate adjustment in the settlement pattern and relocation of *ollas* (villages) in some instances. These interventions would include careful planning and adjustment of the settlement pattern, careful division of the land-use based territories into different fire blocks for rotational burning and grazing, thinning the bush land and protecting it from any interference until such a point that it is suitable for successful burning and renewal.

The approach used in this case focused on creating space and giving pastoralists a voice. This was done by forming discussion platforms at district, zone, and regional levels. The approach is discussed below.

1. Influencing policy makers by creating discussion platforms

District-level meetings: pastoralists lead the discussion

PARIMA, together with its local government and NGO partners, embarked on creating discussion platforms. These platforms enabled pastoral communities to express their worldviews and also be part of the development process i.e. in the initial discussion, and subsequent planning and implementation. Two district-level meetings were held (in two different districts) and were attended by the representatives of the traditional pastoral institution leaders, community members, district administration and district pastoral development office heads. PARIMA staff facilitated these meetings, and pastoralists attending the meeting were given the leading role in the discussion. They discussed how to go about developing consensus among the

participants on how to control bush encroachment and the possible revival of the local range-fire practice. By the end of the meetings pastoral community representatives, district administrators and experts had reached a consensus on the need for action because of the loss of grazing areas due to bush encroachment that had resulted from the ban on application of fire. The participants at the meetings made a recommendation for a higher level meeting i.e. zone level. They also recommended that the zone level meeting should include the 8 district administrators, heads of the district pastoral development offices and NGOS operating in the areas.

Zone-level meeting: a workshop on experiences on range management interventions

After three months, PARIMA together with the regional pastoral development commission organised a workshop. Invited participants from government and NGOs were advised beforehand to come with documentation of the range management activities they were involved in, and all responded positively. The aim of this workshop was for pastoral community representatives to gain first-hand experience of what organisations are doing in range management interventions, and for the pastoralists to reflect on the deliverables of the NGOs and GOs. Key to this meeting was the presence of the Borana traditional leader *Aba Geda* and members of his council, including the religious leader *Qallu*. The deputy director of the regional agricultural research institute facilitated the meeting. The workshop was opened with traditional blessings performed by the *Aba Geda*. He and the two other Borana traditional leaders spoke on the problem of bush encroachment and how it had developed over time. They recollected the past, and described in detail the present status of the range condition, and what they expected to see happening soonest. The local NGOs and local government representatives (district administrators and experts) were also invited to present their experiences on specific interventions on range management. Feedback was given on the presentation. The key element of the feedback, endorsed by all participants of the workshop, was the need to tackle the policy gap. They recommended that a regional level meeting be organised to address policy issues around the fire ban, and also create awareness on the severity of the bush encroachment as a result of the decisions being made by policy makers.

Regional-level meeting: Pastoral traditional leaders, community representatives and district administrators travel to meet with policy makers

Following the workshop at the zone level and the recommendation made, PARIMA held two separate meetings with the heads of the regional pastoral development office and the regional agricultural research institute. The agenda was to share with both officials the recommendations and to develop ways on how the recommendation could be further followed up. Both officials accepted the need to hold the workshop, and asked PARIMA to come up with a draft outline for the regional workshop. PARIMA developed the workshop plans and agenda and presented them to the two officials. After inputs from the officials and the experts in their respective organisations, PARIMA finalised the workshop plan. The workshop, which was held in 2006, was jointly convened by PARIMA, the regional pastoral development commission and the regional agricultural research centre. The approach in this case was to bring representatives of the pastoral communities and district administrators and other groups to where the policy makers are i.e. transporting these groups to the

meeting venue located 100 km from the capital city Addis Ababa. This was again nurturing an attitude of sharing and connecting with the members of the pastoral communities. This was the first move of its kind, engaging policy makers in a discussion with pastoralists, a discussion intended to initiate respect for their views and aspirations, and acknowledging them as the custodians of the natural resources.

Policy makers and pastoralist community representatives attended the meeting, and an assessment was made of the challenges of and opportunities for the rangelands development. Key attendees at this meeting were representatives of pastoral elders (two from each of the eight districts), administrators from each of the eight districts, NGOS, federal government pastoral development office representatives, researchers and academics. Selected district representatives of pastoralists and administrators talked about the problems on the ground. An expert from the regional pastoral area development office gave a presentation on the policy and technical gaps around the application of fire as stipulated in the forest proclamations. Policy makers attending the meeting became aware of the gaps in the proclamations, and the damage this has caused. The regional meeting also enabled the participants to take a long-term view of the issue, and they recommended that capacity building/training be given in the application and control of prescribed fire.

2. Capacity building: training on the use and control of prescribed fire

As it had been established that there was a gap in capacity/skills on the application of fire, PARIMA, together with the Regional Agricultural Research Institute, agreed to conduct training of selected groups that could later serve as trainers. The trainees included pastoralists, NGO representatives, natural resources experts in the government line departments, researchers, and members and individuals from academic institutions. This was a training of trainers (TOT) session and so the numbers were limited to 25. With the exception of the research and academic institutions, the other organisations (NGOs and GOs) that were invited to send representatives to the training were those that have ongoing activities in the areas of natural resources/range management. Individuals from academia were invited to attend because PARIMA also wanted to create awareness on the value of local practices of range management, so that students coming from higher institutions of learning would also be reached.

PARIMA made arrangements with the trainers: in this case pastoralists (local trainers) as well as an outside trainer on application and control of fire. One month after the end of the regional meeting, PARIMA was able to identify the trainers and the venue was arranged in the capital of the Borana zone. The pastoral experts on fire made oral presentations at the training session; an international expert developed a manual for teaching.

The training programme consisted of two sessions. The first training session was an overview of the pastoral systems, how pastoralists manage rangelands, and the use of fire as a local practice. The second session was led by the traditional fire experts and they conducted an interactive session on the analysis of fire as a traditional range management tool. The session included theoretical training as well as site selection, pre-fire application preparations, actual application of fire and post-fire management protocols. The actual burns were done on selected sites in community enclosures. The training took six days and also focused on technical issues related to

prescribed fire management. This was supported by experience-sharing interaction, sessions on traditional and current community perception, and opportunities to improve rangelands.

The capacity training workshop had three major objectives that were successfully achieved:

- Appreciation of endogenous range management practices;
- Identification of opportunities to integrate this knowledge and local resources with appropriate outside input based on pastoralists' own culture and worldview;
- Bringing in modern knowledge on the application and control of fire.

Once the capacity-building work had been successfully completed, the next move was to develop a multi-stakeholder approach to the wider application of fire in the rangelands.

3. Developing a multi-stakeholder approach in partnership

PARIMA took the lead in facilitating the creation of an alliance among pastoral communities, researchers, policy makers and development actors to scale-up the application of fire in the Borana Plateau. The objective of this was to develop a coordinated approach so that all actors (those engaged in range management interventions and those who plan to initiate, including others who do not work at the grassroots level but one way or the other have a direct influence on the activities carried out) begin to work in partnership. The need for the partnership arose after all the institutions that took part in the small-scale fire operation in Borana convened for a reflection session in the Ethiopian capital, Addis Ababa. They recommended that efforts needed to be harmonised and coordinated if they are to make an effective contribution. This brought about the birth of the regional steering committee on fire.

The regional agricultural research institute was selected to chair the steering committee, mainly because it is one of the arms of the regional government that has a mandate for regional research activities. The regional pastoral development office became the secretary. Others, i.e. NGOs including funding agencies, became members. The task of the steering committee is to evaluate the current ongoing activities on the application of fire and develop ways to scale up the activities including the type of support (human and material) required. In particular, it takes the lead in reviewing and approving action plans on the application of prescribed fire, and facilitates the establishment of the district-level steering committees. Its members are pastoral representatives (those that were trainers in the training of trainers session), district-level natural resources experts and representatives of NGOs and other organisations working on natural resources.

PARIMA was a member of the regional and the district-level steering committees, and actively involved in the facilitation, which included assisting in the development of the action plan, providing technical back-stopping for the district level steering committee, chairing the district-level committee, and serving as a secretary of the regional-level committee. The role of the district-level steering committee on fire is to prepare the detailed participatory action plans, mobilise the pastoral communities, collect data and report back to the steering committee. Therefore this 'partnership umbrella' included pastoral communities (traditional leadership and the members of

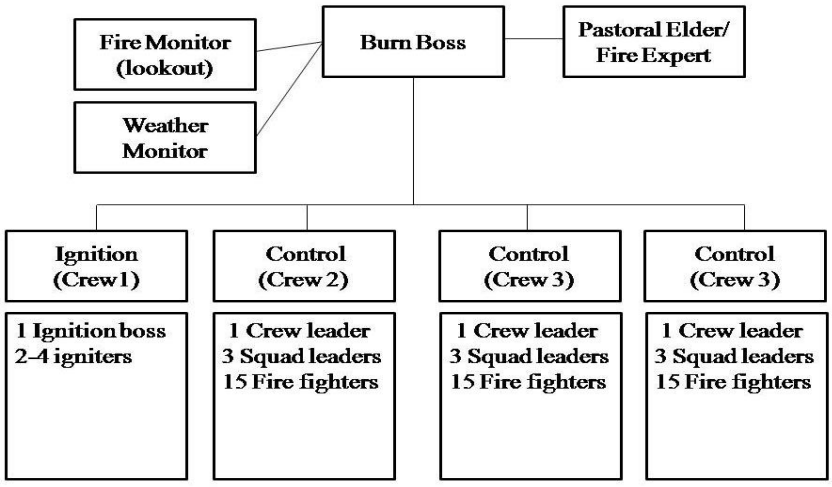
the grazing council), research organisations, local government technical offices and NGOs. The partnership also came at an opportune time: the USAID Pastoral Livelihood Initiative (PLI) had just been launched through the CARE and Save the Children/USA consortia. The PLI effort allowed the fire initiative to be expanded in terms of active members to include more NGOs. The technical backstopping was further enhanced via USAID support for a team from the US Forest Service (USFS) to engage in capacity building. The USFS team focused on building capacity of partners to carry out much larger burns.

Stage 3: Starting the application of large-scale fire

The re-introduction of fire in the Borana rangelands was facilitated by encouraging participation of Borana elders and other pastoral community leaders who understand the importance of using fire to manage rangelands. Several key elements in the re-introduction of fire were:

- Borana leaders were once again able to decide where fire is most acceptable in the context of the traditional Borana political institution, the *Gadda* system.
- Participatory planning and development intervention strategies based on traditional knowledge and values were put in place.
- The role of NGOs and other institutions was to function as facilitators and inform future community decisions with back-up in the form of monitoring, technical support and logistics.
- The formation of a fire task force under the district-level steering committee. The duty of the task force was to locate the sites selected for burning, to assist communities in conducting the actual burn, and provide technical support, when requested.

The fire implementation plan was as follows:



Before conducting the burn, criteria were set by the district-level steering committee on the appropriateness of a site for burn. For instance, use of fire was not recommended in areas near pastoral encampments or in areas highly invaded by

woody bush because of the marked loss of a vigorous grass community. The steering committee also ensured that the community has the ability to reserve an area so that no grazing takes place there, or pre-treat an area by thinning woody plants using human labour, so that the sites could eventually build up enough fuel to be burned.

Stage 4: Participatory monitoring of the results

One of the recommendations made at the regional meeting with policy makers was that PARIMA and the regional research institute (through its pastoral and agro-pastoral research centre located in Borana zone) should make a participatory monitoring of locations where fire was applied and come up with a brief assessment report. In early June, following the end of the big rainy season in the area, PARIMA got together with the pastoral leaders that participated in the application of fire, and did a post-burning assessment. Five pastoral elders were involved in carrying out the assessment, and three technical staff from PARIMA and the pastoral research centre collected ecological data. One person accompanied the members of the pastoral community to record their evaluation.

The pastoral elders evaluated the location where fire was applied as follows. Fire resulted in:

- improved condition of the herbaceous layer;
- good kill of noxious bush species;
- increased site visits by wild grazing animals;
- increased availability of key grasses used for housing thatch and other building materials;
- less tick burden on livestock;
- fewer instances of predatory animals;
- less teat damage on cow udders due to cuts from *Acacia drepanolobium* thorns.

To supplement these results, a quantitative assessment was done by using frequency data for vegetation and bare soil occurrence on sample paired sites before and after a treatment that included manual thinning of *Acacia drepanolobium* (a noxious woody species) stands followed by fire. PARIMA's assessment results suggested that changes in the herbaceous composition and exposure of bare ground occurred as a result of fire. The overall forage species composition improved on the fire site and the amount of bare ground decreased. The most striking change was the doubling of cover for the highly valued forage grass, and the amount of exposed bare ground was reduced by the application of fire.

Stage 5: Producing guidelines for the use of fire

The regional government representatives (including the research centres and academia) strongly recommended that PARIMA produce guidelines on the application of fire and a simple monitoring guideline too. We also noted that standard training material is required. We realised that guidelines that incorporate the objective realities of the pastoral areas do not exist. The individuals that participated in the Training of Trainers course needed standard teaching materials. Research centres and academics

also needed these materials so as to be able to integrate this experience in their curriculum.

As a result, PARIMA produced two documents that serve as guidelines. One focuses on the application of fire, providing a document on simple procedures for the application of fire in the context of the Borana plateau. The document contains sections on law and policy regarding the use of fire; when and why fire is used; concerns of the pastoral community; site selection criteria; site preparation and pre-treatment activities; fire prescriptions; fire plan; fire implementation; post-fire monitoring and range management; and fire task force organisation. The guidelines incorporate the experiences gained in the Borana plateau since 2005, and cover procedures for prescribed fire application when carried out by development facilitators, NGOs, Woreda NRM experts and training institutions such as the Yabello Pastoral training centre. It is geared to all those who have participate in range resource management intervention.

The other document produced by PARIMA is on simple monitoring techniques. It was developed in a response to a request from development practitioners in the area. They had indicated the lack of a simple affordable monitoring protocol that allows actors to gauge the change as a result of fire application and other range management interventions.

Conclusion

Pastoral communities have several endogenous practices that need to be documented and strengthened through awareness raising, policy change or an empowerment process. The use of fire is an endogenous range management practice, which is effective when used in combination with other range management principles. Widespread use of fire in this way will help to restore the pastoralists' capacity for drought mitigation and improve the condition of valuable natural resources including wildlife, water supply and carbon storage. The re-establishment of permanent fire institutions in Borana may require many years of implementing prescribed fires to build new experience and knowledge. The measure of success will be when pastoral communities continue to initiate fires without interventions from outside organisations and significant portions of the rangelands are being burned to maintain rangeland productivity.

This case study shows that endogenous livestock development means working with livestock keepers, rather than for them. It is an example of supporting their initiatives, and basing development efforts on their knowledge, resources and worldviews. Endogenous development is about creating space for the illiterate to voice their views; it is about recognising pastoral communities as custodians of natural resources; it is about respect and creating space for rituals; and also about change of attitude in connecting with pastoral communities – the way we (as development practitioners) enter the community and they way we think about and for the community. The case has also brought to light that pastoral communities are able to take the best of both local and outside knowledge in their effort to re-instate fire as an endogenous range management practice.

Conclusion

The quest for a methodology of endogenous development

Marc P. Lammerink

Introduction

Strengthening local people's capacity to analyse the problems that affect them in their wellbeing aspirations and to design potential solutions is a good way to achieve sustainable endogenous development. Although apparently more time consuming than conventional development approaches that rely on 'blueprint' plans and development experts, these approaches generally lead to development efforts that are sustainable in the long term because people themselves have the most important stake in their success.

It is clear from the contributions in this book that there are no 'blueprints' available to support organisations or outsiders seeking to enhance endogenous development. In other words, there is no best way of how-to-do endogenous development, nor are there fixed recipes for all circumstances and all continents.

Approaches to support endogenous development require methodologies that are sufficiently flexible and compatible to enable rural communities and the supporting organisations to share, analyse and enhance their understanding, and allow them to plan and implement activities to improve their wellbeing. These methodologies should be capable of guiding field workers who support people-centred approaches, where communities themselves take initiatives and collective action to improve their own wellbeing in a continuous development process. They make use primarily of local resources and potentials from within, but also draw from external knowledge and resources if needed.

This book contains descriptions of approaches based on various interventions by outsiders to support, catalyze, strengthen and enhance endogenous development. This chapter attempts to capture some of the communalities[*] in approaches described during the write-shop, in a move towards developing a more global systematisation of approaches to integrating local knowledge into development interventions.

> *Statements we feel represent crucial aspects of these approaches are printed in this font.*
>
> **Our critical comments are printed this way.**

[*] We deliberately use the word communality (of the community) here rather than commonality (the fact of being common), to emphasise that endogenous development is firmly rooted in communities and that this book has been a communal effort.

Communalities of support approaches for endogenous development

All the approaches share in common that people's worldviews and livelihood strategies are taken as the starting point for development. Furthermore sustainable development is regarded as a balance between material, social and spiritual wellbeing, but the ways of going about this vary and are elaborated upon in varying degrees of detail. A common factor is that all approaches try to support communities to take control of their own development process in order to achieve their wellbeing aspirations.

An additional communality is that all approaches devote great attention to building a relationship of confidence between the field workers from an NGO ('outsiders') and community members. This is based on an attitude of equality in the relationship.

A local focus is common in all contributions: all are oriented towards the felt/expressed needs of local people and institutions. Endogenous development deals with issues directly experienced and explicitly acknowledged as important by local people and institutions. From the start of the process there is a strong link with locally generated initiatives, and as such, endogenous development aims to generate information and support decision-making processes that are relevant to local aims and local initiatives. Furthermore, the involvement of non-local professionals is as partners in a learning process. The non-local professionals contribute to the process of endogenous development as facilitators or by providing technical or management information, and via discussions and negotiations with local actors. Typically, they serve more as facilitators than as experts.

Thus, the main focus of most approaches to strengthening endogenous development presented here is to help rural people develop their own processes of analysis, initiative taking, action and assessment. This is the truly participatory aspect of most methodologies presented. As CIKOD states it: 'using what we have to get what we want'. Endogenous development is a means by which people use *their* internal strengths to gain from or influence external resources to meet *their* development needs.

Most approaches here presented also share a strong focus on process, whereby process is as important as results achieved. Linked to this, raising awareness is also a prominent part of supporting endogenous development: much attention is devoted to making participants aware of the implications of the issues being analysed (problem, situation, possible solutions, outcome of experiments) and supporting them in undertaking relevant action. Most approaches adopt communication means that reach larger numbers of people than for example written reports (these are useful for institutional or professional training purposes), such as meetings, posters, development theatre, festivals and workshops as means of providing feedback to local institutions and the community at large.

Five-stage approach for strengthening endogenous development

How partner organisations go about supporting the wellbeing aspirations of communities they work with can be described roughly in five stages:

- Diagnosing and identifying local knowledge and practices
- Identifying and testing new techniques
- Organising towards self-management and local leadership
- Sustaining and self-reliance
- Movement building through advocating and linking

Below we elaborate on the communalities of operational approaches and practical tools on how-to-do endogenous development in these different stages.

Stage one: Diagnosing and identifying local knowledge and practices

In most of the approaches here presented (some) community members actively participate with 'external support workers' throughout the process, from the initial design of the process, through data gathering and analysis, to the final presentation of results and discussion of their action implications. The community is actively engaged in the quest for information and ideas to guide their future actions. The practitioners are involved as both members of a community and local development workers. An important feature of the approaches is the dialogue between development professionals and people in the community and the participation in public activities such as festivals and rituals.

Implementation of this stage follows a logical sequence, starting with the joint preparation by field workers and project staff of a common framework for a support project and the selection of the target area, supporting NGOs or CBOs and finally the communities. This is followed up in the selected communities by a participatory situation analysis, a needs assessment and problem identification, and recording past experiences and identifying possible solutions. All of these activities together form the diagnosing and identifying local knowledge and practices stage.

The steps in the stage include preparation, learning sessions for the support team, selecting of the communities, and identifying problems and possible solutions.

Preparation

First the support organisation (usually an NGO) assembles an interdisciplinary team, representing different expertise depending on the main focus (e.g. technical and social expertise). Later, in most cases, local development teams are also formed at the community level (sometimes from CBOs). New teams can prepare themselves by collecting and reviewing information on other examples of endogenous development in their country, holding discussions with other support organisations on their approaches, and assessing common problems from the points of view of the community and the organisation. Field visits may also be useful. This step allows the support organisation to get a general overview of experiences and results with processes of endogenous development in their own country.

> *Preparation provides an opportunity for the support staff to orientate themselves in the field with respect to issues to which they may have paid little attention, such as indigenous knowledge, local practices, marginalised groups, worldview, traditional institutions, spirituality and gender.*

Learning sessions for the support team

The team of professionals will need to develop appropriate attitudes and skills to be able to support endogenous development. Important elements are the preparation of the self and team-building. Teamwork involves mutual trust and dialogue, as well as group-work skills, and the ability to listen, to observe and to question, and to offer feedback. In many teams these skills are lacking.

Box 1. Processing the 'self'

'The community heard of my work in another village and sent a delegation to invite me for a meeting. I gave them a day I was to come and they told me to come to the Chief's house when I am coming. On first contact with this new community (Kalbeo), I introduced myself, explaining my mission and my interest in working with their spirituality and their ancestral worship in my development activities with them (being a stranger to the area). They already knew my work so I did this as honestly as possible at a general community forum at which they freely asked questions for clarifications. Then I invited them to take me through their due process of receiving guest into their midst who was interested in working with their spirituality as well. I gave the community some space and time to process me and my engagement with them through their various consultations, sacrifices, media, to seek clearance and acceptance. They would come back to me when they were done. If I did not see them again that would mean they had rejected me. This was done and they sent a delegation 'to welcome me in'

I am a Catholic. But in order to empathise with the people's spirituality, I decided on my own to go through soothsaying to have an experience after they had welcomed me into their midst. This was after I had been officially processed by the community. I was taken to a woman soothsayer who took me through the consultation process. Going through this increased my reverence and respect for traditional religion and better prepared me to work with the people with these values in mind.' (David Millar, Monsaraz, 2009).

Group-work skills can make team members more sensitive to how others see them, and can make them more realistic about the changes they are supporting. Teams should also practice the participatory principles they promote. This is probably the greatest challenge, when it comes to the design and implementation of activities: devising external interventions that really build on local peoples' knowledge and strategies.

Learning to facilitate such participatory processes takes time and care.

During the learning sessions it is also important to discuss different approaches for support to endogenous development and obtain agreement on an analytical framework, as well as developing criteria for selecting the communities. From the outset, it is also important to discuss joint ideas for sustaining the process and for documenting and disseminating the approach and results at the end of the process.

Such learning sessions or workshops can be facilitated by members of organisations that have already worked with an endogenous development approach and have developed training facilities. In Sri Lanka, for example, the main issue is to select and train social mobilisers in a thorough process, which takes a year or more of learning-by-doing.

It is very important that social mobilisers or field workers act with communities in ways that enhance the endogenous knowledge, capacities and initiative of communities.

Selecting communities

Following the learning sessions, work may begin on selecting the communities. This selection can be based either on communities that have requested support (the ideal starting situation), or on communities known to the support organisation. If the latter is the case, efforts should be made to encourage more communities to enter the process. The contributions describe various ways of selecting: sometimes this is done through a community- or farmers' organisation, which selects the communities to work with; sometimes individual fieldworkers or social mobilisers are selected, who then train a community-based organisation.

It is not clear from the contributions about the criteria used for selecting both the target area and the communities.

The support team's work with the community starts with gathering and analysing secondary information, and building a relationship with local people with the aim of 'being welcomed in' and reaching a basic common understanding. Events like parties, community walks, transect walks, participating in rituals, in harvest festivals or just having fun together can help build trust and establish good communication.

> *It is important to establish as soon as possible a practical and clear basis for the proposed collaboration, which may result in a local protocol. As can be seen from the contributions, community members are not just 'stakeholders', but are in fact rights-holders with entitlements under law that others are obliged to respect.*

A protocol helps the community to articulate its norms and values in its own voices while still being understood by non-community actors. The support organisation and the community should together agree upon the local protocol, describing also as much as possible the proposed process, the role of the participants, the potential outcomes, and the proposed methods of supporting the community.

At the end of this step, the team members should be ready to implement their endogenous development methodology, which is highly participatory and reflects wellbeing aspirations of community members in the villages. The communities should have been selected and protocols agreed upon. There should be a preliminary understanding of the socio-cultural, spiritual, and physical and resource base of each community. Team-building efforts and learning to develop facilitating and documentation skills should have started for community team members.

Diagnosis: mapping of local knowledge

In this step, the support team facilitates the community so that it can describe and analyse its local context, development history, resources, livelihood strategies, and wellbeing aspirations and concerns, trying to include perspectives of women and other marginalised groups. This can also be done through a community self-evaluation (as is the case for Agruco) or a baseline survey (FRLHT) followed by participatory rural appraisal, including local healers, to gain a profound understanding of local practices and traditions. FIOH does this as a collective effort.

At this stage it is important for field workers to gain an understanding of the local history of development (interventions) and local organisational structures, and to build upon existing experience, knowledge, institutions, leadership capacity and resources. The contributions show that peoples' worldviews and livelihood strategies

are the starting point for development. Agruco and Ceprosi have learned that it is important to incorporate and make use of a ritual calendar in the agricultural cycle. FRLHT places local health traditions in a worldview where Indian understanding of medicine is made explicit.

For the diagnosis, a combination of methods and tools are available. Some of these emanate from the tradition of participatory research and Participatory Rural Appraisal (PRA), such as semi-structured interviews, observations, participatory mapping, transects, seasonal and other diagrams of flows, causality, trends and local organisational relationships, ranking, brainstorming and case studies of experiments.

No specific tools are mentioned for gaining a better understanding of worldviews.

This step brings to the forefront repositories of traditional knowledge, such as local health practices; sacred groves; water points; clay deposits; indigenous agro-ecological practices; collective organisation of work for agriculture; links between farming and worldview. Some of these practices are becoming eroded and vanishing. Yet, despite this, traditional cultures display a remarkable resilience in most of the experiences described from Asia, Africa and Latin America. Traditional cultures have often found ways to maintain their lifestyles, adapting to outside influences and forces, as they have done for centuries.

Though not openly expressed, traditional values, knowledge, concepts and practices still play an important role in local decision-making processes. These practices are recovered during the process of enhancing endogenous development.

Box 2. Worldview in FIOH's work

In Sri Lanka, traditional farming practices are based on collective systems and the worldview of the communities. The farming practices in turn also support the worldview. Traditional farming used to be based on the fundamental Buddhist concepts of ahimsa (doing no harm) and mettha (loving kindness). Under this system there are no 'pests'. All creatures have a function in nature. They use nature-friendly and spiritual techniques to chase away 'unwanted' creatures. Working with nature made the system sustainable. During FIOH's engagement in the process, such principles came once more to the forefront.

Thus the aim of this stage is to help communities deepen their vision of their 'wellbeing' in all its dimensions as a step towards designing initiatives to achieve 'wellbeing'. Recovering and re-valuing indigenous knowledge and culture are important: in the case of Sri Lanka the group- and village-level forums provide a solid platform for strengthening traditional agriculture.

From the very beginning, the aim of the external support organisation should be to devolve as much responsibility for the development process as possible onto the communities. Each new livelihood initiative is a way to engage community members in strengthening their capacities, and learning how to assume more responsibilities for effective endogenous development.

Identifying problems and possible solutions

During meetings, informal gatherings and interviews with key individuals such as local healers, village elders, women's groups or farmer organisations, the team and

community members can determine the range of topics of interest and concern related to endogenous development. The community members are encouraged to evaluate these and to compare their findings and experiences, and identify opportunities and solutions from other communities through exchange or cross-visits.

Developing action plans on what to change and what to enhance

The next part of this step involves a series of activities, which can be summarised as developing an action agenda (an agenda for trying things out): gathering information for detailed analysis of priority topics and identifying promising solutions. The agenda may include screening indigenous technical knowledge and past experimentation in the community, as well as gathering promising ideas from outside the community as options for further testing.

The staff of the support organisation can begin analysing the data, although the results should be continuously reviewed by the community in a series of return visits. During these visits the objectives will be to establish criteria for setting priorities (for example through ranking exercises), and to review potential solutions by assessing their advantages and disadvantages. Also, consensus should have been reached on the list of priority problems and on possible solutions to be tested (an agreed 'action agenda'). This should formulate precisely what should be tested, and by whom. The last part can be done at a village meeting or other gathering.

In the contributions, the aspirations embodied in action agendas are well connected with the 'worldviews' of participants. This is a result of the facilitation of the mobilisers and the activities implemented.

> *The accompanying monitoring and evaluation system is based on the indicators for wellbeing developed with the community members during the planning process.*

For instance, in Sri Lanka, one understanding of wellbeing is: 'having ample food at any given time at home'. Ample food means not only having enough for family consumption; it also means having enough for giving alms to monks and to the needy, as this is a way of accumulating merit according to Buddhist teaching. Local groups and higher-level organisations monitor their own progress continuously in monthly meetings, making use of simple charts.

Stage two: Identifying and testing indigenous knowledge and practices

During this stage, an interactive process is established with the communities to explore the possibilities and problems the community faces in relation to improved wellbeing, and to discuss, jointly design and adapt possible solutions. These solutions, which are developed by endogenous development practitioners themselves, can eventually be field-tested and evaluated by the community at large or directly put into practice. A process of action-learning can then start for agreed activities.

The overall aim of this stage is to design experiments or actions that are reliable as well as manageable, and which can be monitored and evaluated by the community members themselves. To achieve this, skills, self-confidence and organisation need to be enhanced so that the community can independently plan and design their own

experiments and actions and can improve, reinforce, and add to existing practices. Capacity building from outside might also include the ability to set up and monitor the actions, which will require skills training, team-building, and efforts to strengthen exchange and supportive linkages with other communities or community members.

Attention can also be paid to enhancing the community's documentation skills; these will be needed to record the outcomes of the support work and the process. Such records can be used to improve the support organisation's methodology and to make the approach more sustainable.

Activities to be developed during this phase include reviews of existing (experimental) practices, which may involve exchange visits to relevant communities or workshops for examining possible solutions. During these workshops the community can plan and design the selected actions, and decide on their scale and layout, what inputs will be required, and who will participate. It is also important to decide right from the start on the criteria that will be used to evaluate the success of an action.

After these preparations, community members and external facilitators can begin to establish, manage and monitor the actions and new practices. Simple monitoring and evaluation methods can be used throughout the implementation stage. Group meetings can be held to discuss the results and begin to draw conclusions. However, the results of all observations need to be brought together and systematically analysed. The process should lead to more sharing and cooperation among community members, as well the more active support of outside institutions.

If the same action is also being carried out in other villages, the analysis may be conducted at both group and inter-village levels.

> *The analysis will include recognising unintended consequences, and how the new actions could contribute to improving wellbeing and diminishing problems in a sustainable way.*

From the feedback provided by the evaluations, a clear picture should emerge of both the results from actions and the process that has been followed. Of course, the solutions accepted or rejected by the community should also be recorded.

> *The process should serve to build the community's confidence in its ability to solve problems, and to create a supportive environment for improving wellbeing based on endogenous development.*

Communities often have to strengthen existing, or develop new capacities in order to be able to improve wellbeing, and engage in new practices or behaviours.

> *Strengthening local and community capacity is an important element of the methodology to strengthen endogenous development.*

The community will better be able to identify social, cultural, spiritual, economic and environmental issues which affect individual and collective wellbeing of their members and to mobilise their resources to take collective action to address these issues. These 'issues' may be related to problems, or to emerging opportunities to improve wellbeing.

> *As much as possible, the community itself takes responsibility for the agreed activities, which are often based on the mobilisation of local resources. This stage is designed to empower rural communities to determine, initiate, and lead a development process 'from within'.*

Stage three: Organising towards self-management and local leadership

The third part of an endogenous development approach, the organising towards self-management stage is important because the participatory process should lead to self-management.

> *Right from the start of the process, the endogenous development team is concerned with organisational development and the creation of other favourable (external) conditions, so that the community has the capacity to continue to experiment in other situations that need to be improved in the future.*

Members of village committees might also develop new functions as endogenous-development practitioners, fostering emerging organisational structures in the community. Throughout the process, the role of the external support team gradually changes. They gradually 'wind up' and phase out their support by consciously changing their role as providers of direct management support and facilitation, to that of external consultants called in only at the request of the community. However, at the same time, they maintain their interest in issues such as scaling up the experience to the regional or national level. Two important steps in this stage of endogenous development are sharing and evaluating the results of the actions.

Sharing results

Many experiences have shown that good ideas diffuse spontaneously, as the experimenting communities share their results with neighbours, pass on management advice, or make use of the traditional inter-village 'grapevine'.

Exchange visits have proved to be a strong ingredient in the sharing process, because they can push the process of enhancing management capacities one step further. When visiting other communities, people often make wise and valid comments and observations because they are involved in the same process.

Stage four: Sustaining and self-reliance

The fourth stage, which until now has usually been the final:

> *the sustaining and self-reliance stage focuses on disseminating methods and tools for improved endogenous development, sharing the findings, and planning and coordinating further work in order to sustain both the process and the outcome.*

Local community organisations should have been sufficiently empowered to sustain their endogenous development process in a continuously constructive trend and to take initiatives by themselves to improve their wellbeing, and eventually negotiate for outside resources to meet their goals. That is how most contributors explain this stage. However, CIKOD also suggests that the process should unfold within the worldview of the community instead of that of the development agent. In their view, creating development within the worldview of the community strengthens the local ownership and relevance of the project and thereby creates sustainability and widespread development.

AGRUCO's experience shows the importance of revalidating local knowledge, to reaffirm local cultural identity and to start a real two-way dialogue based on complementarity with outsiders, where neither party submits to or is subjugated by the other. This strengthens self-esteem, as does reflecting on the origin, history and potential of the local culture, highlighting the values that are no longer found in Western culture, such as the preservation of community solidarity and the respect for nature as a living entity. Participation in rituals surrounding the Pacha Mama (Mother Earth) is another activity that helps cultural reaffirmation: it symbolises outsiders' sincere appreciation of local rituality, and constitutes a strong motivation for the communities.

As people in communities build their self-confidence, their capacities and sense of their full potential, they will begin to recognise the need to coordinate with other villages to share resources, learn from each other, and increase their negotiating power with respect to outside bodies. This can be amplified by setting up a programme to share the results with others. An important component of such a programme is the mobilisation of the networks developed during earlier stages as channels for communication and dissemination.

Sharing could focus on the outcomes (new endogenous development practices, improved wellbeing) of community actions and experiments, while emphasising the basic ideas and principles underlying the actions, and the methodological aspects of the endogenous development process. The programme could also publicise the experiences of particular communities, together with ideas about promising 'solutions' that could be put into practice elsewhere, and tips on 'how to do endogenous development', innovative concepts, on acquiring relevant skills, and the organisation required.

For both the support organisation and community organisations, it would be beneficial to maintain a relationship at the inter-community level, for learning, sharing ideas, and support for communities to engage in wider networks and advocacy, or action research.

Stage five: Movement building through advocacy and linking

The fifth stage concern the policy dimension of endogenous development, and the experiences described in this book address this stage to a limited extent. This stage is important for establishing a broader movement of community-driven initiatives so that outcomes can be sustained, up-scaled and mainstreamed. In India, FRLHT is one of the leading organisations in the movement for revitalising local health practices. AGRUCO's endogenous development approach was introduced by the Bolivian government in 50 municipalities in 2010. In Ghana, CIKOD is the leading organisation that advocates for interfacing traditional and modern governance systems.

Final reflections

Development processes are not predictable, because of the specific characteristics of each community, and those involved in endogenous development are faced with setbacks and conflicts. However, the community members give a lot in return – their creativity, trust, humour and often real commitment. The relationships that develop between facilitators and community members are often intense, satisfying and challenging for all. The contributions in this book clearly illustrate this.

Also it becomes clear that while the communities may not have emerged from their material poverty, nor achieved all of the millennium development goals, all of them have begun a process of positive change. This is based on the affirmation that their own abilities, culture and way of doing things are not bad and are not the cause of their poverty, but rather the basis from which to take the first steps on the path towards wellbeing.

> *Often, increasing self-esteem has turned out to be one of the most important outcomes achieved.*

Most contributions show that the approaches to support and enhance community mobilisation have enabled community members to re-vitalise traditional practices, in agriculture, health and education, practices based on local wisdom.

The endogenous approach encompasses a number of steps, activities, methods and tools to encourage the full participation of community members in improving their wellbeing. Above we have developed a certain sequence of steps, however, these should not be regarded as fixed; each individual process may differ so that, if necessary, some steps may be repeated or run in parallel. In some cases, one might even move back and forward, increasing a community's understanding in the process. In addition, some activities will be continuous throughout the process, such as:

- decision-taking by community members;
- strengthening and empowering of community organisations;
- enhancing community members' understanding of principles and practices of endogenous development based on local resources
- encouraging a new vision of the future.

Facilitating processes in rural communities to strengthen the capacities of people to manage their own development process is fascinating. Much of the work is about a 'mindset', becoming aware of one's own and learning to listen to and understand that of others. Hence, the emphasis on the first stage of strengthening endogenous development. Supporting endogenous development involves time and commitment. It can only be done with respect for local knowledge and culture, preparing the self in advance, in close contact with local people, based on mutual confidence, with patience on both sides, with wisdom and a good feel for community life.

Further information

FIOH

Future in Our Hands – FIOH – is one of the leading NGOs in the COMPAS Sri Lanka network. FIOH is a non-profit, non-governmental organisation registered in Sri Lanka, working to assist the poor communities to find solutions to their social, economic, political and environmental problems, through organised action at district, provincial, national, regional and global levels.

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CIKOD

The Centre for Indigenous Knowledge and Organisational Development – CIKOD – is a non-governmental organisation based in Ghana. Its main mission is to develop methodologies for the strengthening of traditional authorities and civil society organisations to facilitate sustainable grassroots organisational development that gives a voice to the poor and vulnerable rural families.

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AGRUCO

Agroecology University Cochabamba – AGRUCO – is a programme of the Universidad Mayor San Simon in Cochabamba. It is a centre of excellence on Agroecology and revalorisation of endogenous knowledge of indigenous peoples in the Andes and Latin America.

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I-AIM

The Institute for Ayurveda and Integrative Medicine – I-AIM – is the multidisciplinary research, education and outreach arm of the Foundation for Revitalisation of Local Health Traditions (FRLHT), a registered Public Trust and Charitable Society. I-AIM's vision is to revitalise Indian medical heritage through creative applications of traditional health sciences for enhancing the quality of health care in rural and urban India and globally.

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CEPROSI

The Centre for the Promotion of Integrated Services – CEPROSI – is a non-profit, non-governmental organisation which aims to strengthen the capacities of children, parents, local authorities and biocultural diversity on the basis of local knowledge, values, spirituality, culture, institutional dynamics and nature-friendly technologies.

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PARIMA

The Global Livestock CRSP programme established the Pastoral Risk Management Project (PARIMA) in northern Kenya and southern Ethiopia between 1997 and 2009. The aim was to improve the welfare of pastoral and agro-pastoral peoples in these areas. The project resulted numerous methodologies, innovations as well as publications.

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Marc P. Lammerink, PhD, is a social scientist and director of FMD Consultants (Forestry Manpower Development). For the past seven years he has lived and worked in Portugal. He concentrates his activities on the development of participative training methodologies in the field of natural resource management and on supporting organisations in developing countries that are implementing sustainable rural development projects. He also works on the implementation of participatory action-research in the field and on policy dialogue related to endogenous development under the COMPAS programme. He is the author of several books and many articles on action research and popular education. In Portugal Marc runs a small country hotel with training facilities, where training sessions and meetings are regularly held as part of development programmes. He is also engaged in several educational activities at master's level at the University of Lisbon.

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Sara van Otterloo-Butler is an anthropologist by training and works as a freelance editor, writer, and translator. She also advises and coaches on communication and writing. Originally from England, she now lives in the Netherlands, in the agricultural university town of Wageningen. Much of her work is on Wageningen-related subjects: agriculture, climate change, environment, natural resource management, rural development, town planning and landscape architecture. She thrives on a variety of media and writing styles, including practical guides, website texts, learning materials and policy briefs. She has worked with the COMPAS programme for over ten years, editing numerous books, the Compas Magazine and the Endogenous Development Magazine.

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