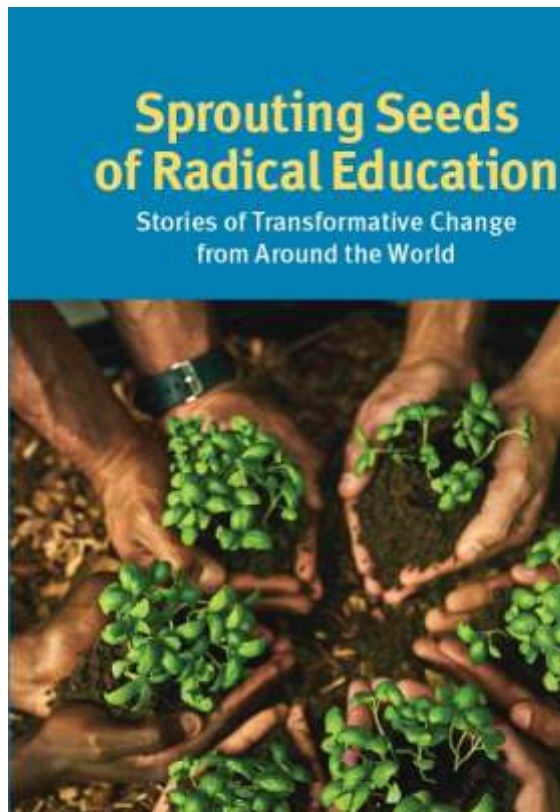


Talking the walk: Facilitating learning to build peoples' institutions

CS Reddy, India; Anuj Jain and David Fletcher, Canada



A reprint of one of 20 essays from:

Sprouting Seeds of Radical Education: Stories of transformative change from around the world
Editors: Debbie Castle, David Fletcher, Olga Gladkikh (2021)
Published by People Development Ltd. (www.pdltd.net)

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Talking the walk: Facilitating learning to build peoples' institutions

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The three of us have each been development practitioners for more than 30 years! Much of our work has involved walking the road of promoting sustainable people's institutions — with all the bumps, potholes and washed-out sections along the way. We have been walking in the field in India, Ethiopia, Thailand, Ghana and many other places. Recently we stepped back to reflect on our learning, specifically about facilitating learning to help build people's institutions.

During our zoom calls we decided to focus on APMAS¹ in Hyderabad, India, which has championed self-help groups and strengthened people's organizations in India for two decades. We all have a connection to APMAS - CS Reddy, as founder and Chief Executive Officer; Anuj Jain, as long time supporter and thinking partner; and David Fletcher, as a learning consultant. What follows is a reconstruction of our conversation about how seeds of radical education have sprouted in the purpose of building people's organizations.

The Foundation of APMAS

David: APMAS is in the midst of celebrating its 20th anniversary in 2021. Congratulations! What has been important during this time in how you trained people to build people's organizations?

CS: My involvement in participatory training originated from CARE International in India, particularly with Dr. Stephen J. Atwood, so I am thankful to them for seeding many ideas. As a development professional the idea of participatory development, participatory learning and participatory rural appraisal systems was introduced in the early 1990s when I was with CARE in Delhi, and later in Hyderabad.

When I founded APMAS, I insisted all trainings must be participatory and built on adult learning principles. I deeply believed in the empowerment of marginalized communities. If we believe in people taking responsibility and being accountable, then a participatory methodology is the way to go. We built on the work of Participatory Research in Asia (PRIA) and Mysore Resettlement and Development Agency (MYRADA), both well-known NGOs in India. We had a Telugu translation of the PRIA training manual on participatory training methodologies. We produced 1,000 copies of that book and distributed it to everyone who attended our training of trainers (TOT) program. Participatory methodologies are not about knowledge transfer, but about empowerment, active learning and shared responsibility. They became part of our DNA because APMAS was predominantly a capacity building and an enabling and mentoring organization. We push participatory methodologies. When you want women — who are part of the self-help groups (SHGs), federations, co-operative financial institutions or farmer producer organizations (FPOs) — to be strong, you must practice participatory methodology. If not, then women's ability to take leadership, their ability to engage in processes that promote self-help, self-responsibility, democracy, autonomy and independence will be stifled.

David: What were some of the positive impacts of those approaches?

CS: In the initial years of APMAS we did not do any field implementation. Our role was predominantly capacity building of promoters of SHGs and their federations. We created a large pool of around 250

district level resource persons (DRPs), all trained as trainers on participatory methodologies and SHGs. We ran residential training programs for them across Andhra Pradesh state. Many people say they use group discussions, role play, case studies, simulations, and so on, but it was important for our participants to understand the adult learning cycle and adult learning principles that were our starting point.

Some DRPs say because of that training, they still have a job today at a senior level. It set a strong foundation and made them committed to the theory of change and transformation that is needed to work with communities to help them build their own strong institutions. Our residential trainings had songs, dance, collage and celebration. During the residential TOTs, participants enjoyed their learning process and were 100% involved in preparing for their practice sessions at night. These were always eight or ten-day programs. What was unique was — not only did DRPs go through the adult learning principles, the action reflection and learning cycle, methods, and how to use them — they did practice sessions that were videotaped. They would then watch their videos and receive feedback. Sometimes the video feedback session would go up to as late as 11 o'clock at night, such was the enthusiasm!

These 250 people, plus another 20 people from APMAS, were like an army who trained around 10,000 people. These trainers created their own charts, songs, games, exercises, and further improvised learning methods that promoted participation.

David: What impact did this approach have within APMAS itself?

CS: We created a culture of learning, sharing and working together. The entire process of facilitation and training with government staff was always more rigorous. We had the best trainers. During the first five years, if anyone left the organization they always found the best jobs, because they were able to impress upon others what it takes to build a sustainable, self-reliant people's institution based on the values of self-help, mutuality and self-reliance. This participatory methodology and philosophy are interrelated with people's institutions that are democratic, autonomous self-reliant business organizations.

Designing and Delivering Courses – Mutual Learning between the Coady and APMAS

David: Let's fast forward a few years. Anuj, you worked with CARE in India, Zambia, USA, Thailand and elsewhere and were involved in many big, innovative programs. When you joined the Coady International Institute to teach in 2010 you invited CS to join you. Why?

Anuj: When I arrived, I realized all the work that had been done in creating people's institutions by the Coady and in the Antigonish Movement. It pulled me back to focus on building people's institutions for financial and economic inclusion. I agreed to offer a certificate course called *Community Based Microfinance for Financial Inclusion*. It was natural to ask CS to co-facilitate because he lives those principles, and always implements them. CS is a farmer at heart, a people's person; he not only talks about it, he actually puts force behind it and gets things done. I knew he would bring credibility to the Coady's work in current times. He accepted graciously and fell in love with the Coady. So, I want to ask him, "What stands out for you now after almost 10 years of coming to the Coady?"

CS: First was the drive to Antigonish from Halifax. I was excited to come to a small university town. The drive was mesmerizing because I am a nature lover. Then when I came to the new Coady building, the environment was very soothing. People were warm, loving, welcoming. Anyone you said hi to in the corridors extended a warm welcome, gave a big smile and chatted. The air was so fresh and there was little traffic! Coming from Hyderabad, a polluted city with chaotic traffic, to Antigonish was a wonderful place to relax, refresh, rethink and re-energize.

David: And the classroom experiences?

CS: I love the systematic approach of an academic institution. In the Coady, it was very methodical. I liked the energy. In the first two years, it took some time for us to fine tune and co-facilitate. We were constantly asking ourselves and the participants: What does this mean to you? How does it relate to your work back home? I was in the mode of experience sharing, so I thought we nicely complemented each other. Anuj brought the global perspective and I was able to bring in case study experiences from India — real examples from the field — with tools and methodologies that worked. That was a wonderful experience. I was always learning from the exercises we did, the conversations, even in the corridors. With case study reading materials, we used to have debates and discussions.

Anuj and I did a lot of innovation in an evolving methodology, going beyond the manual, but starting with some structure, a small class size, a classroom setting that was flexible, and that automatically promoted participation. For example, in India participants tend to call everyone ‘sir.’ At the Coady we called each other by first names, so there was egalitarianism in the class. Anuj always brought candy into the room or flowers to decorate, which created a wonderful learning environment and broke hierarchical barriers. We had structured sessions, but we almost always deviated from the plan and broke rules. We never believed that rules were always the best things to follow, but having them to start was important.

Anuj: CS also brought something special to the classroom: a manner that is authentic, natural, not put on. That is his biggest value. His sharing was so connected with people's own experiences and lives that it immediately brought credibility to the conversations.

From a methods point of view, we introduced several things. One example is the debate methodology leading to synthesizing learning around contentious issues which showed there is no one right answer. We posed, “Should SHGs federate or not?” or “Does microfinance really create women's empowerment?” We used that method and pushed people against each other, and then through synthesizing as a group, we would come to realize that reality was somewhere in the middle.

We introduced field visits to a farm. This started when we were out for our morning walk and CS waved to this farming family, busy doing early morning chores. We became friends and soon after they invited our participants to visit their farm, which is a member of the local Scotsburn dairy co-operative. It was such a critical exposure for the group from many developing economies. They learned what a small farming family looks like and how farmers continue to struggle even in Canada to maintain their small farm status.

In the classroom, we truly behaved like “learner facilitators.” There was great equality, but not one point of view. We never felt shy about challenging each other in front of the class. If we had a different point of view, we presented it respectfully; this made it authentic for people. We both genuinely believe in building people's institutions, so I think that became our fulcrum. No matter what the method was I think people saw our commitment to building people's organizations.

CS: Using participatory methods for building institutions became the culture, the religion of what we did at APMAS. It sounded very much like courses at the Coady. Participatory methods created a culture of respect, listening and challenging each other. Sharing authentically with other practitioners was its richness; it was not a tool or technique; it was the overall cultural approach that made a difference. Since starting APMAS, I realized I had to believe in people and their knowledge.

Anuj: So, we are not just teachers?

CS: We are, and we should be willing to learn. We should be willing to understand participants' constraints, their challenges, their circumstances, particularly when we talk about women's empowerment and savings and credit groups: owned, managed, controlled and used by women. The belief that women can lead organizations was fundamental to our work. If you are talking about community based

microfinance, self-help is fundamental. When you want to promote self-help, mutuality and respect in co-operatives, then one person, one vote is fundamental, as is the belief in democracy.

Anuj: We could not do anything less in the classroom. The processes that are critical for building people's institutions include believing in their innate capability, experiences and their decision-making ability. Appreciating the community is important, while challenging members to embrace a system that will enable them to be perpetual organizations. They are not just there for a month or a year, but forever. In our classroom and field experience, we always had this resonance of the philosophy and values of participatory methodology and cooperative institutions. These principles were mutually reinforcing.

David: How was that received? In the classroom we have people with different levels of education, different experiences and from different countries and contexts. What was your sense of how the principles and values you were promoting were received?

CS: People came with a lot of hunger for learning, open minds and a lot of questions and experiences. They came not only with a willingness to learn, but a willingness to share. Anuj ensured there was adequate opportunity for participants to share their best practices, their experiences, their learning and their innovations.

In terms of the participatory methodology, I think the participants loved it. We had these distinct organizational models. In India, they are called self-help groups, in Africa village savings and loan associations. In both, the idea is that the models must ensure transparency, accountability and services to members, not profitability. In many courses, we had staff from microfinance institutions as participants. By the end they became transformed. They said, “We didn't know that community-based microfinance is actually empowering, enabling, building and going beyond the so-called delivery of microfinance.” There are different perspectives: government officers coming from a service delivery perspective; NGOs coming from a women's empowerment perspective; and bankers coming from a financial inclusion perspective. All these perspectives are valid.

Anuj: When I first joined the Coady, I was not fully aligned with the diversity of people in the classroom. A lot of work went into this. We must have spent hours re-designing the course and going back to this fundamental idea of community-based institutions for people's own economic freedom. Not many people in the general public understand that SHGs are innovations over co-operatives. Co-operatives became too management and governance oriented, where power fell into the hands of a few people. SHGs are brilliant innovations — keeping it small so that everybody has the chance, the flexibility and the convenience to participate. Those SHGs can also be brought together to take advantage of an economy of scale that the co-operatives have.

People often came to the course to find answers, but we told them “You must find your own answers.” What you will get is an exposure to what is happening in the world. A big part of the course was the learning project. They had to come up with a learning question on day three of the course and then pursue the answers to that question. We also created a small game where we distributed an equal number of small wooden coins to every participant. Every time someone learned from another participant, they would immediately give coins to that person. It was amazing validation for the person who got those coins.

David: What else were you seeing at the Coady that was valuable to APMAS and your work?

CS: We watched what others were doing. We saw sessions using the Margolis Wheel,² for example, and used it in our final session for peer feedback. We also picked up the World Café method.³ We were always hungry to improvise our methodology and the learning environment for the participants.

We were curious about the excitement always coming from the *Community Development Leadership by Women* certificate course facilitated by Debbie Castle and Emily Sikazwe. The women were always animated. I would be jealous because they had these colorful charts on the wall and were always creating things. So, Anuj and I would have a big discussion and say, “We are too content oriented, we need room for creative expression. Learning must be liberating, empowering and enabling.”

Continuing to Learn Together – Participatory Capacity Building with APMAS

Anuj: David, when you were directing education programs at the Coady and first met CS what were your first impressions, and how did that lead to your work with APMAS over the last few years in India?

David: I remember the great enthusiasm CS showed, his willingness to ask questions about programs overall, and really engage with what was going on. He was curious about what we were doing in the facilitation course and was interested in getting a copy of our manual. I heard about the interactions with the women's course and the initiative you both had to say, “Okay, let's find out what the excitement is about.” Debbie and I had been going to India on an annual basis and CS invited us to Hyderabad to co-facilitate a two-day session, and things developed from there. It has been an organic evolving relationship.

CS: The reason I wanted you both involved was that I knew when a new person comes reflection becomes more effective. I knew I would not have to manage you as foreign consultants and I could convert myself into a participant. Your facilitation of those sessions with participants from the National Institute of Rural Development, the Management Development Institute, and other NGOs was refreshing, and I thought it made people become better at what they are doing by learning from each other.

David: I remember feeling a bit nervous about working with all these highly experienced practitioners and thinking we needed to offer more theory about the processes and methodologies. In conversations with you, you were always determined just to bring them together to reflect on their practice. You reminded us to focus on the process of interacting with them. In the first warmup activity, everybody was standing and sharing with each other and chatting enthusiastically. It was clear the people who were there had enthusiasm, commitment and hunger to improve their practice and it would be an amazing group to work with.

Anuj: How are those participants practicing what they learned through reflection with Debbie and David?

CS: They now do more thinking when designing their sessions. There was a lasting impression about preparing well for a session, and not getting too carried away by how much we need to cover. A lot of the methods people were exposed to have become part of our self-learning modules for the FPOs. New modules are being developed everywhere. David and Debbie made our APMAS team think about a participant-centred approach to learning. Now we use the word learning, rather than training, “How do we make this session a learning experience?” They also like to do more outdoors. The static style of sitting around a table with a lot of PowerPoint slides is changing; now there is more movement, getting off the chairs, integrating trust building and other kinds of exercises. We did these exercises before, but now they are more diverse and most importantly, they have a deeper understanding about participation and unlearning. The practitioners are more confident in conducting sessions and less anxious about facilitation.

David: In all three sessions we have done with APMAS, there has always been lots of practice. We use video for feedback, which you said you did early in your work, and we do a “hot seat” for peer feedback where people try to really hone and polish their skills to take them to another level.

Have you found that idea of constantly improving themselves, trying new things, taking risks and then getting feedback makes a difference?

CS: Absolutely. They use video a lot more, recording two-minute synthesis statements from group members. We are also producing more videos so farmers' organizations will have a series of them for learning approaches and regulations.

Anuj: David, can you say more about your learning experience with these highly experienced participants. What was your impression about their level of engagement, commitment and curiosity?

David: It was different for the different groups we worked with. In the first two-day session with APMAS and the NGO group, it was obvious they had worked with these kinds of tools before. They had already done a lot with women, farmers and people in communities to make their sessions engaging, but there was a hunger to learn and do new things. I remember one participant who had been doing these kinds of activities for more than 20 years had some deep questions, "Is it really making a difference? Is this really the kind of stuff we need to do after 30 years?" Other participants had just started a new management institute and were curious about what they could do to make the place unique; and they were taking lots of notes, sharing their manuals and wanting comments. That first interaction was exciting in terms of the willingness people had to reflect on their own practice. I think we called the course *Invigorating Your Teaching Methods*, and they were very keen on doing that.

On our second visit we did a three-day session with a group of academics. They were engaged, but it was clear they came from a different perspective. It was not about being a practitioner in the field, but rather about being a content expert in the classroom. They were terribly busy with all the programs going on, so it was a different kind of interest and motivation. The contrast between the NGO group working in the field and this group showed how constraining institutional settings can be. They were interested to learn and do things differently, there was great leadership there, and a desire for efforts to be values-based, but an institution can really put constraints on the space people have in their heads for learning. For us, it was a great sense of recognition that in India there are huge contrasts between the levels where people work and the different kinds of interactions and interventions that can make a difference.

CS: Now you have done a third session. It is always good to have continuous engagement because learning and facilitation is a continuous process. David and Debbie have a wonderful way of influencing people to look at alternative ways to make facilitation more effective, more impactful. That is why I feel in the years to come, the engagement needs to be ongoing. Then facilitation and learning can become more effective and that will strengthen the institutions of the farmers.

Is This Work Radical?

Anuj: How is this radical, or specifically helpful to creating people's institution? Is it still relevant in 21st century?

CS: Having seen the Antigonish Movement and co-operatives created by Coady graduates in other countries, it gives me confidence the approach we are pursuing in India is the correct one. It is different than what many others are doing. The emphasis must be on democracy, autonomy, independence and self-reliance. It is also clear that building membership-based people's organizations around economic activity, but not exclusively economic activity, takes time. It does not happen overnight — patient, committed, process-oriented facilitation is needed to build long-term sustainable institutions. In India, we tend to be in a hurry, or expect it should happen in a three-year project cycle, but building self-reliant people's organizations takes time. That is abundantly clear to me now. Going slow can be radical. I find absolutely no reason why one should compromise on values and principles. How do we live the co-operative values and principles? How do we practice them on a day-to-day basis? In adult education, a participant-centric approach is important. We cannot impose rules, regulations and structures. We need to be evolving and open-minded.

My self-confidence has gone up over the past 10 years because I can see it more clearly. As a practitioner and facilitator, even when I conduct a staff meeting, I am now more participatory. When I make a field visit, I now listen better. This idea of listening to and learning from people and being willing to change is powerful. Many people will say this, but we have to constantly challenge ourselves to practice it. This journey has helped me broaden my perspective and deepen the approach we have in APMAS. Many organizations in India seem to appreciate APMAS sessions on values and principles. Our strong push for SHG federations to be self-regulating, for example, is all about how to practice the values and principles of democratically run people's institutions. We, at APMAS, are constantly learning, improving, and influencing how to make these federations important community-owned economic and social institutions, self-managed and self-governed. This is not the norm. With our steadfast belief in participatory methodologies, we have also influenced many World Bank and Department for International Development (DFID) funded projects which are implemented by governments. Now the projects all practice participatory training methodology and are process-oriented in promoting sustainable people's institutions.

David: You mentioned participant-centered process facilitation. I think that is very much how I tend to identify myself and I think Debbie would as well. It is a concept that has been around for a long time, and in its own way is very radical. In addition, there is this sense of trusting the ability and the desire of people to want to learn, and through that learning to understand better, then to make decisions and choices to improve their situation in a just way. That focus on learning is very central to what we have been involved in.

As you said, CS, a values-driven, principled approach to setting up organizations is so important for organizational effectiveness, organizational development and organizational learning. It starts with individuals and those individuals in dialogue with each other. That is where the real learning takes place, and that learning transforms individuals and shifts relationships between individuals. Then people in those relationships can set up institutions and sustain them. There needs to be structures, systems and accountability, but it is the values and principles that must be set in the foundation. You can not have people's institutions and FPOs until that foundation is set. I have learned a lot about that from you and APMAS.

CS: I am also deeply thankful to Debbie because every time she is at APMAS, the women staff get excited. She is a source of inspiration. It brings back into focus APMAS being a women's organization. How do we be more women-centric, even though our work was with all women organizations. Now as we move to farmers' organization, there tends to be more men. Debbie reminds us to maintain our women-centric principles. So that reminder has been unbelievably valuable. Both Debbie and David's involvement strengthens my hand because staff feel inspired and creative. Their batteries are generally recharged for six months!

I think now the task for all of us in these pandemic times is how to continue our passion to promote participatory methodologies through capacity building, developing learning modules and policy advocacy. The ENABLE network is a national network for enabling the SHG movement and APMAS has taken on the responsibility of promoting self-regulation among the SHG federations and FPOs.⁴

How do we continue to promote values-based learning systems using new tools? The power of technology can be harnessed. Yet we must be participatory, even though we are not physically there. It is a big challenge!

Anuj: It is something we can work on together! To continue to walk the talk of using participatory engagement processes to build authentic people's institutions.

Endnotes:

¹ APMAS is the name of a not-for-profit society established to promote self-reliant people's institutions. Originally named the Mahila Abhivruddhi Society Andra Pradesh it has now expanded to other parts of India and developing countries and is simply known as APMAS.

² Description of Margolis Wheel available at www.pdltd.net/list-of-facilitation-tools.

³ Description of World Café available at www.pdltd.net/list-of-facilitation-tools.

⁴ ENABLE: www.apmas.org/enable.php

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ISBN: 9798517947642

Published by People Development Ltd.

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