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**The Problematic Practice of Participation and Solidarity:
An Analysis of Partnership Between
Progressive Canadian and Jamaican
Non-Governmental Organizations**

by

Pari J. Johnston, B.A. (Honours)

A thesis submitted to
the Faculty of Graduate Studies and Research
in partial fulfilment of
the requirements for the degree of

Master of Arts

The Norman Paterson School of International Affairs

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The undersigned hereby recommend to the Faculty of Graduate Studies and Research acceptance of this thesis, submitted by PARI JUSTINE JOHNSTON, in partial fulfilment of the requirements for the degree of Master of Arts.

Maureen Appel Molot

Maureen Appel Molot, Director
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of International Affairs

J. O'Manique
Professor J. O'Manique, Supervisor

Abstract

Progressive NGOs have been distinguished as those which have an explicit agenda of empowerment in their programming strategies and approach to participation at the grassroots level. However, progressive NGOs' approach to participation at the North-South NGO level has not been fully explored. This thesis analyzes the strategic choices being made by progressive Canadian NGOs regarding the nature of their programming in the Caribbean region and these NGOs' processes of priority-setting with Jamaican partners. It argues that mutual participation in priority-setting and decision-making is key to establishing equality and creating effective programmes in partnerships between progressive Northern and Southern NGOs. The institutional and political-economic context in which NGO partnerships are embedded limits progressive NGOs' capacity to engage in participatory relations.

For my parents
Marjorie and Steffen Gross
and
my aunt
Lynn Ross

whose example of strength and commitment to making a difference
I can only try to live up to.

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Acronyms

ACE	Association of Caribbean Economists
ADA	The Association of Development Agencies
ASSIST	Agency for the Support of Individuals Starting Trade
CAFRA	Caribbean Association for Feminist Action and Research
CANCON	Canadian Consortium of NGOs
CANSAVE	Save the Children - Canada
CCC	Caribbean Conference of Churches
CCIC	Canadian Council for International Cooperation
CCODP	Canadian Catholic Organization for Development and Peace
CDA	Combined Disabilities Association
CIDA	Canadian International Development Agency
CPDC	Caribbean Policy Development Centre
GTC	Groundwork Theatre Company
IAWG	Inter Agency Working Group on the Caribbean
MCC	Mennonite Central Committee
MNI	Mel Nathan Institute
PAC	Partnership Africa Canada
PFP	Projects for People
SAC	Social Action Centre
STC	Sistren Theatre Collective
WROC	Women's Resource and Outreach Centre

Chapter 1: Introduction

In the 1990s, a number of interconnected variables are challenging traditional theories and practices of development. Conventional development assistance programmes, usually top-down and planned by outside agencies and Southern governments, have failed to enhance local participation and sustainability of development projects. At the same time, official aid flows from North to South are dwindling, capital and resource flows from South to North are increasing and the gap between the rich and poor at the global level is growing. In addition, the capacity of the Southern state to spearhead social and economic development is being increasingly eroded due to the growing influence of transnational capital and the interlocking crises of debt, balance of payments and fiscal deficits and structural adjustment programmes. The problem-solving capabilities of the nation-state are also being undermined by such transboundary issues as refugee migration and environmental degradation.

Given these challenges facing official development agencies and the state, development discourse has increasingly focused its attention on the capacities of such actors as women's groups, cooperatives, community associations and other members of civil society¹ to build a process of sustainable and participatory development. Parallel to this trend has been the increased theoretical and policy

¹ There are many definitions of civil society. I use the definition of Macdonald (1994). "Civil society constitutes the arena of organized political activity between the private sphere (the household and the firm) and the formal political institutions of governance (the parliament, political parties, the army, the judiciary etc.)" (1994: 1)

emphasis on the role of non-governmental organizations (NGOs),² in strengthening civil society, facilitating local participation in development efforts and organizing a response to these challenges. This focus on NGOs is based in the assumption that NGOs "initiate and/or further these processes by promoting democracy at local levels and by forcing greater government accountability" (MacLean 1993: 1). Further, NGOs are assumed to be best able to carry out this role, in partnership with other NGOs, through North-South linkages.

However, the assumptions held about the inherent qualities of NGOs are beginning to be questioned. There is a large body of literature in which the nature of NGOs and their relations with each other in a North-South context are explored. Some NGO theorists argue that, in fact, not all NGOs promote democracy, facilitate local participation, force greater government accountability or challenge the dominant development model, in the same way or to the same degree.

Some authors have drawn a dividing line between "progressive" and "conventional" NGOs by arguing that their respective approaches to participation, their analysis of power, and the nature and quality of relationships formed with local-level partners are very distinct. As mechanisms of globalization have drawn nations of the North and South ever closer, other theorists have explored the concept and practice of North-South NGO "partnership" and attempted to redefine what have,

² The term NGO has its roots in the U.N. system (Murphy 1991: 163). I have elaborated upon the definition from Malena (1995: 1) to identify NGOs as voluntary, not-for-profit organizations, addressing international development, peace, human rights, environment, gender and indigenous issues, which are independent from government and serve the interests of a wider base than their own membership.

historically, been unequal relations among NGOs of the North and South by advocating a vision of solidarity and common cause.

As I have read this literature on NGOs and their relations with one another, I have had many questions answered and had others form. I found myself asking what progressive NGOs' concept of partnership would be and what it would look like in practice. I also wondered how the concept of solidarity, a concept I believe in, would be put into practice in North-South NGO relations. However, I found that there were gaps in the literature in relation to these and other questions.

In general, theories of NGOs and NGO partnership do not adequately address the links between the nature of progressive NGOs and the conceptualization and practice of solidarity relations. Further, there is not an adequate conceptual framework of participation and the constraints to participation in solidarity relations between progressive Northern and Southern NGOs. Finally, there is not enough attention to the fact that partnerships between progressive Northern and Southern NGOs occur within a particular institutional and political-economic context and that this shapes their conceptualization and practice of participatory and solidarity relations.

The fact that these areas of study require further analysis establishes the rationale for this thesis project. In this thesis, I analyze the programming priorities and process of priority-setting and decision-making between progressive Canadian and Jamaican NGOs within the context of changing Canadian-

Caribbean external relations. This analysis highlights the constraints and challenges to the practice of solidarity relations in general and participation in particular between progressive Northern and Southern NGOs as they engage with each other within a changing external context. Mutual participation in priority-setting and decision-making is a crucial component in partnerships between progressive Northern and Southern NGOs, particularly in establishing equality and creating effective programmes. However, due to the institutional and political-economic context in which NGO partnerships exist, there are important constraints to this participation which limit progressive NGOs' capacity to engage in relations of solidarity.

Chapter 2 outlines the research methodology and methods, as well the actual process, of this thesis project. In this chapter, I highlight some of the methodological problems of conventional development studies research and then explore the alternative approaches of participatory and feminist research. These approaches have informed the methodological perspective and research methods chosen for my research. This methodological framework is followed by a narrative of my actual research process and the limitations that I experienced. I conclude the chapter with an assessment of the participatory nature of the research process and recommendations for strengthening a participatory research project.

In Chapter 3, by reviewing the discourse of development, participation and NGOs of the World Bank and CIDA, I illustrate that NGOs have been

conceptualized as an homogenous group of actors. By reviewing theories which differentiate among NGOs on the basis of programming strategies, philosophies of development, strategic orientation and gender, I demonstrate that NGOs are, in fact, a heterogenous group of actors. I then discuss more recent frameworks which differentiate between progressive and conventional NGOs on the basis of their power agendas and approaches to participation at the local level. The chapter concludes with the question of what progressive NGOs' approaches to participation would look like at the North-South NGO level.

In Chapter 4, I explore the literature on North-South NGO partnership and argue that two principal conceptual frameworks may be distinguished. I have characterized these as the "reformist" and "solidarity" frameworks of partnership. In outlining these frameworks, I focus particularly on the origins and assumptions which underlie their differing conceptualizations of North-South NGO partnership, as well as their respective strengths and weaknesses. I conclude the chapter with an examination of the concept of participation within the reformist and solidarity frameworks of partnership and argue that these frameworks do not adequately address the specificities of, or constraints to, participation in North-South NGO relations.

In Chapter 5, I examine the broader political-economic context of Canadian-Caribbean relations which shapes the programming priorities, strategies and choices for partnership of progressive Canadian and Jamaican NGOs. I illustrate how the "special relationship" between Canada and the Commonwealth

Caribbean region, and the preferential status that has historically characterized the Caribbean's place in Canadian foreign policy, is being transformed. Global trends which prioritize trade reciprocity and increased competitiveness and the Canadian government's response to these trends, as outlined in recent Canadian foreign policy documents, have contributed to a restructuring of this relationship. I argue that it is within the context of this response to global trends that Canadian development assistance in the Caribbean region is being restructured to focus on increased competitiveness, trade liberalization and privatization in order to reduce the region's "aid dependency." It is also within this context that progressive Canadian-Jamaican NGO relations are being redefined.

Chapter 6 contains my case study of the practice of partnership between progressive Canadian and Jamaican NGOs within this changing broader context. In this chapter, I examine the programmes, strategic directions and priorities for the Caribbean region developed by progressive Canadian NGOs. These NGOs are restructuring their Caribbean programmes to develop hemispheric or regional-level, thematically-based programmes which prioritize policy development and coalition, network and alliance-building to create a hemispheric social movement for change. I argue that certain of these programming choices, particularly the move to consolidate Latin American and Caribbean concerns in one theme-based programme and redirect funding to umbrella NGOs, are not grounded in the specificities of the Caribbean context. Such programming trends are redefining progressive Canadian-Jamaican NGO relations; this shift has potentially negative

implications, particularly from the local-level Jamaican NGO perspective.

I then review the processes involved in setting the strategic priorities of progressive Canadian NGOs. At a conceptual level, these NGOs embrace a solidarity framework of partnership and identify mutual participation in priority-setting and decision-making as one key component to building relations of solidarity between Northern and Southern NGOs. At the practical level, it cannot be said that all have engaged in participatory processes of priority-setting and decision-making. I outline the constraints which limited the capacity of progressive Canadian NGOs to actualize participation in the process of determining programme priorities with progressive Jamaican NGO partners.

I conclude the chapter with some observations regarding the relevance of these findings to the future practices of progressive NGOs and to NGO partnership theory. Participation in programme priority-setting and decision-making in North-South progressive NGO relations is important at two levels. On the one hand, it works to establish a footing of equality and a transfer of power in North-South NGO relations. On the other hand, it creates more effective programming by fostering broader accountability and gaining a greater range of perspectives which grounds the programme in local specificities.

In Chapter 7, I summarize the thesis and present some possibilities for future research to carry this investigation of the practice of partnership between progressive Northern and Southern NGOs forward into other areas. This research has made clear to me the complexities of North-South NGO relations

and the challenges of carrying out research on this topic. It is my hope that it gives, in a modest way, a clearer understanding of the nature of progressive NGO relations in a particular context and that it provides progressive NGOs with some input into their own process of reflection and analysis.

This research is the result of a multilayered and organic process. The next chapter will put my investigation into a personal context by outlining the research methodology, methods and process of this thesis project.

Chapter 2: The Why's and How's of Research

Introduction

If you can increase the understanding of an issue or a circumstance, illuminate one experience, portray one person's story in a new light, you will have helped others to understand the social world a little better. *This* is what research is all about (Kirby and McKenna 1989: 96; emphasis in original).

[M]any of us who are involved in the field of development studies have become part of the problems of underdevelopment, rather than being a part of the solutions to these problems (Edwards 1989: 117).

The notion that much international development research -- a field of studies which is "dominated by the North" (Edwards 1989: 123) -- has been at best unhelpful and at worst damaging to those marginalized by the modernization development process is a potent challenge to a Canadian graduate student of international development studies. With this challenge in mind, I pondered the usefulness of my anticipated thesis research in the greater realm of "development studies." What purpose would this research serve? It would fulfil my Master's requirement and I would learn much about a development topic that interested me, but it would perhaps be just one more problematic piece of Northern scholarship. Or was this perceived dilemma an exercise in unnecessary angst? After all, "it's only an M.A. thesis."

In this chapter, I first outline some of the key methodological problems of traditional research carried out in the name of development studies. I then explore alternative methodologies in the form of participatory and feminist research, outlining both their theoretical underpinnings and their practical

components. Participatory and feminist research have informed the methodological perspective and research methods chosen for this research project.

A key problem that I was faced with, after choosing to adopt this perspective, was the extent to which a Master's thesis on NGO relations in a North-South context could be participatory. Were my goals attainable, given the constraints I faced? There were, of course, both internal and external limitations which caused me to deviate from the ideal participatory research project. These limitations and the way in which I dealt with them are outlined, along with the exceeded expectations of the project, in a narrative of the actual research process. The chapter concludes with my observation that ultimately there are strong elements of participatory research in this project and, equally, there are ways in which a participatory research project could be strengthened.

2.1 The Problematic Field of Development Studies

There is power embedded within certain elements of the process of knowledge creation. The power to define, to categorize, to generate theory and to name something as fact. Many Southern authors argue that much of the Northern-dominated development studies research is profoundly distorted, and that these distortions work to justify the unequal North-South power relations, rooted in ethnocentrism, racism and imperialism, in which the research is embedded (Amaduime 1987: 8; Mohanty 1991a: 54). They argue that these distortions have been particularly evident in the research done by Western

feminists "on" Third World women. Mohanty (1991a) asserts that many Western feminist scholars have defined women living in the Third World in terms of "underdevelopment, oppressive traditions, high illiteracy, rural and urban poverty, fanaticism, and 'overpopulation'" and have created a static category of "third world women"³ who are "frozen in time, space and history" in contrast to the norm of progressive and modern Western women (1991a: 6). Mohanty (1991b) singles out authors whose work falls within the Women in Development (WID) literature as being particularly guilty of such categorizations. In studying the effects of development practices and policies "on" women in the Third World, they are constructing women as "a coherent group or category prior to their entry into the 'development process'" and thus ignore the fact that "women are constituted as women through the complex interaction between class, culture, religion, and other ideological institutions and frameworks" (Mohanty 1991b: 63). Such distorted research has been designated "epistemic violence", which refers to the "discursive violence committed by First Worldist dominant discursive formations in the images, stereotypes and representations of 'subaltern' or indigenous women" ⁴ (Emberley 1993: 20).

³ In contrast to such categorizations, Mohanty (1991a) employs the term "third world women" as a *political* designation in order to show that what "seems to constitute...third world women as a viable oppositional alliance is a common context of struggle [against]...sexist, racist and imperialist structures" (1991a: 7).

⁴ The notion of "epistemic violence" was originally conceived by Gayatri Chakravorty Spivak in her essay, "Subaltern Studies: Deconstructing Historiography." Other Worlds: Essay in Cultural Politics. New York: Methuen, 1987. 197-221.

Many of the research distortions are the result of faulty research methodologies, "haphazard theoretical formulations" (Amaduime 1987: 6) and unexamined assumptions of the universality of such concepts as marriage, motherhood, family, household, sexual division of labour, patriarchy, male dominance and "women" itself (Amaduime 1987: 6; Mohanty 1991b: 53-5 & 67). Mohanty (1991b) critiques three methodologies in particular: the use of data from many countries to prove a universal fact, usually that of a universal, monolithic patriarchy; the use of such concepts as family and household without grounding them in local cultural and historical contexts; and confusion of "the use of gender as a superordinate category of organizing analysis with the universalistic proof and instantiation of this category" (1991b: 66-9).

Critiques such as these point to the faulty conceptual frameworks underlying much development studies research. Other critiques highlight relevance as a more general problem. In other words, by failing to make the links between understanding and action, much of the conventional research done in the context of international development studies is irrelevant. Edwards (1989) argues that conventional approaches to development studies which render the research irrelevant stem from

the 'professionalisation' of development studies and the devaluation of popular knowledge; the values and attitudes of researchers and practitioners that prevent them from working as equals; the control of knowledge by elites; and a failure to unite understanding, action, relevance and participation (1989: 133).

Ellis (1990) also argues that inaccessibility is a factor that makes much traditional research in the development context irrelevant and invalid. Citing an example from her own experience as a key informant in a research project being carried out in a low-income community in the Caribbean, she talks of the inaccessibility of the language and style used in the final report, and the lack of connection between "the situation that was being described and the real situation in which I was working" (Ellis 1990: 24).

Critiques such as these have motivated the search for new ways of thinking about and doing research and more appropriate and nuanced methodologies which produce locally specific and useful knowledge, particularly in the context of development studies. Participatory and feminist research are two such methodologies. Instead of the implicit relation of "power-over" within the traditional model of development studies research, these alternative methodologies aim to promote "power-to" address and resolve one's own problems and "power-with" others to discover, explore and work together on common causes.⁵

⁵Feminist perspectives of "power-to" and "power-with" challenge the traditional Western notion of "power-over" or power as domination and control. Albrecht and Brewer (1990) define the feminist concept of power as a "process in which people transform themselves personally and collectively" by drawing on their energy and strength and by being open to others (1990: 5).

2.2 Defining a Methodology: Participatory and Feminist Research

"Research Methodology Blues": I am feeling somewhat stressed today about my research and how to link it to the self-analysis and work that Canadian NGOs are doing. I really want to pursue the possibilities of doing something for a Canadian NGO (Personal journal, 12 October 1994).

Participatory research (PR) evolved as an alternative to the dominant expert/researcher - object/researched model of social sciences research (Maguire 1987: 31). Its theoretical origins have also been identified as stemming from dependency critiques of international development assistance and alternative theories of adult education (Maguire 1987: 31). PR aims to redress the lack of direct involvement of the subjects of research in the research process. In fact, their full participation in problem identification and solving is PR's organizing principle (Maguire 1987: 29). It is designed to "define social change by the populations themselves on the basis of their own perception of reality" and is aimed at "achieving power and not merely growth for the grassroots populations" (Rahnema 1990: 200).

PR has a number of key assumptions. It assumes that research is political and not neutral; knowledge has become the "single most important basis of power

^aThe ideological/structural approach of participatory research must be distinguished from the more technical approaches of participatory rural appraisal (which uses such techniques as trend analysis, seasonal diagramming, livelihood analysis, or participatory mapping and modelling to assist rural groups in analyzing their situations and arriving at solutions) and participative management which uses team participatory planning and problem-solving methodologies to assist organizations in adapting to change and innovating. See Beaulieu and Manoukian (1994: 56-8) for further details of these particular participatory approaches.

and control" and "oppressors' power is, in part, derived from their control of both the process and products of knowledge creation": ordinary people, living a marginalized existence, are fully capable of critical reflection and analysis when provided with the proper "tools"; and shared power, in the form of control by participants of the decision-making and products of the research process, is crucial (Maguire 1987: 35-8). Traditionally, PR involves the researcher and subjects in a collective process which combines the *investigation* of problems identified by the participants with *education* through analysis of the structural causes of the identified problems and *action* to resolve these problems and effect greater societal change (Ellis 1990: 25; Maguire 1987: 29).

Thus, PR offers important guiding principles of participation, engagement, subjectivity and power-sharing to a researcher trying to create an open research process. However, it has not been above criticism. Rahnema (1990) questions PR proponents' concern for empowering the oppressed in the manner defined by the oppressed and wonders instead if it is not a "participatory exercise aimed at elaborating a number of ideological positions held by the intervenors" who "have no doubt as to what kind of power is needed by the people, what constitutes their 'just interests', and what type of experience and valid data are required for the purpose" (1990: 205). In addition, PR literature has been criticized for its androcentrism which ranges from gender-neutral language when referring to the "oppressed" or "communities" to lack of specific attention to women's participation in project design and benefits, as well as the central focus given to issues of class

(Maguire 1987: 51-2). This is where feminist research makes some important contributions.

Some feminist authors argue that it is not in the methods, or techniques of gathering evidence, used that feminist research may be distinguished; indeed, they argue, feminists use all the traditional methods of inquiry (Harding 1987: 2; Reinharz 1992: 240). It is in how they use these methods that one can speak of a methodology, or "theory and analysis of how research does and should proceed" that is distinctly feminist (Harding 1987: 3). One central methodological characteristic of feminist research is the identification of research problems from the perspective of women's lives in order to provide explanations that women seek, not for the sake of "pure truth" but for providing strategies or policy recommendations to advance the social struggles in which women are engaged (Harding 1987: 6-9; Reinharz 1992: 251).

Another methodological tenet of feminist research is that it situates the researcher and the researched on the same plane, as subjects in a bigger social whole (Mies 1983: 123; Reinharz 1992: 258). This acknowledged subjectivity of the researcher requires a stance, not of neutrality, but of "conscious partiality," in which the researcher partially identifies with the participants in the research process (Mies 1983: 123). The implication of conscious partiality is that during the research process the researcher needs to work within the tension of both her "political biases and the critical distance needed for reflection" (Farrow 1993: 89).

Finally, feminist research entails putting the research in a personal and

political context and explicitly asking the questions of "Who am I speaking for?" "What are my motivations for doing this research?" "Who benefits from this research?" "How am I portraying the researched?" "How will this research be used?" "What are my responsibilities to funding agencies, academic institutions etc. and how does this influence my research?" "How am I relating and situating myself vis-a-vis the researched?" (Kirby & McKenna 1989: 52; Oakley 1981: 53).

Thus, in defining a methodology for this research project, I began, to a certain extent, with myself. The way I understand the world to work and the connections I make between issues have very much shaped how I have come to this topic, how I have analyzed my research question and the process that framed this analysis. There are many personal assumptions which form the basis of my "conceptual baggage"⁷ and in order to make explicit my subjectivity in this research and its choice of methodology, it is appropriate that I "unpack" some more essential pieces.

⁷ This term, which comes from Kirby and McKenna (1989), refers to what I have brought with me, both conceptually and experientially, to this research project. Recording my conceptual baggage is a continual process of writing my thoughts, ideas and questions about my topic; laying bare my personal assumptions, preconceived notions, certainties and uncertainties about the topic; and describing myself and my world view. In this way, I am able to account for myself in my research process and make it as transparent as possible. It is in the spirit of making my conceptual baggage explicit that I have included some excerpts from my thesis journal in the text of this chapter. The idea for this was gratefully borrowed from Maguire (1987).

While not currently an active participant in the progressive Canadian NGO community, I believe in the possibilities for social change in its alliance with progressive Southern NGOs.⁸ In the introductory chapter, I mentioned how certain NGO theorists and practitioners are rethinking and redefining the conventional ways that Northern and Southern NGOs have related to one another. I believe in the transformative possibilities of this way of thinking for the dominant paradigm of development itself. In contrast to this dominant model, my understanding of development is that it is a dynamic, historical process in which women and men in communities are agents of their own development. These processes may vary across cultures and nations, but they work to create conditions of social justice, cultural renewal, enjoyment of full human rights and redistribution of wealth in which all members of communities can make choices, express their vision and realize their full human potential.

My belief in collective action for social change is coloured by my identification with the strengths of socialist-feminism and a historical-materialist analysis. However, while I recognize the historic centrality of human resistance and agency in making change, I also acknowledge the constraints put on people's actions and choices by the structures of patriarchal capitalism, imperialism,

⁸As briefly mentioned in Chapter 1, progressive NGOs have been distinguished from conventional NGOs on the basis of their approach to participation and their power agenda. This typology will be explored at greater length in Chapter 3. However, for clarification at this point, progressive NGOs may be understood as those NGOs which take an explicit empowerment, as opposed to technical approach, to local participation and which recognize the inherently political nature of any NGO interventions.

racism, heterosexism, ableism and ageism as they exist in varying degrees across cultures, places and times. My values and beliefs are further layered with my association with and involvement in my parents' activism in the Saskatchewan labour movement and their concern for the marginalizing effects of economic restructuring on members of the working class in Saskatchewan, Canada and the South.

It is within this personal and political position that my research is located and my goal has been to carry out a research project, which would, in its methodology, internalize and reflect these same values and beliefs. For me, this meant a research methodology which embodied the key principles of feminist and participatory research. As Kirby and McKenna (1989) state,

[t]hese principles are the essentialness of accounting for the experience of the researcher in the research, of giving priority to the voices of the participants, of an egalitarian research process and of contextualizing the research (1989: 21).

As Farrow (1993) suggests, a researcher's conceptualization of the content and processes of "development from within" suggests possibilities for a process of "research from within" (1993: 87). Kirby and McKenna (1989) also argue that a researcher's conceptual framework will determine the methods she uses to carry out the research as "different research methods are in fact different ways of classifying people and organizing the world" (1989: 33-4). In fact, they argue that "[c]hoosing a method for a piece of research is a political choice" (Kirby & McKenna 1987: 64). Thus, in my search for appropriate methods, I looked to the

participatory and feminist research literature for examples of how such research projects are ideally carried out and what methods are used.

2.3 From Methodology to Methods: Choosing the Research Tools

It is important to understand not only the theoretical basis and rationale for PR, but the particular stages and techniques which characterize PR projects. PR theorists, like Maguire (1987) have outlined five stages which characterize an ideal PR project. The first phase has been identified as the stage in which initial information about the research area and central problems faced by the community is gathered and analyzed and relationships are established with members of the community in order to link them with the research project. Guiding this first phase is the premise that the general research problem should come from the community. The second phase entails the identification, using various techniques and processes, of the key problems perceived by community participants. The third phase attempts to connect the problems perceived by community members to the wider social context and thus enable participants to reflect critically on the social and economic conditions which condition their realities. This reflection and connection stage enables participants to formulate the key questions and themes for investigation. The fourth stage involves the collective design, by the researcher and the participants, of the research process to investigate the questions posed. The fifth stage ends with the researcher and participants

identifying action projects to address problems defined and investigated (Maguire 1987: 40-42).

However, the "community" is not homogenous. As Maguire (1987) argues, communities may be structured along gender, ethnic, class and racial lines and recognition of this stratified community must be built into the research process (1987: 51). Thus, she advocates a feminist participatory research framework in which the concept of gender relations⁹ would be a key component in both the theoretical and five practical stages of the participatory research process. Such a framework would centralize gender in the following components of the research process: critique of the androcentric foundations of social science and participatory research; issues agenda and theoretical debates of PR; process of initial information gathering, problem definition; data gathering, data analysis and results benefits; language use; research team composition; project evaluation; and review and tracking of all PR projects (Maguire 1987: 105-7).

Within the actual research process of initial information gathering, problem definition, data gathering, data analysis and results benefits, PR theorists and feminist researchers advocate the use of a range of different methods. Of particular importance in the initial information gathering and problem definition stage is the researcher who "can be an important tool in the research process if she uses her sensitivity, responsiveness and adaptability to advantage" (Ellis 1990:

⁹This is not a position which advocates a universalist notion of gender. Maguire (1987) argues for an analysis of gender relations which is grounded in local reality and which acknowledges diversity based on class, race and cultural lines (1987: 106).

26). Kirby and McKenna (1989) suggest that a continual recording of the researcher's own conceptual baggage is an important tool in information gathering (1989: 85).

Also important in this first stage are case studies which are used to show the limits of generalizing and pose challenging questions. Reinharz (1992) argues that a feminist case study is "used to document history and generate theory. It defies the social science convention of seeking generalizations, by looking instead for specificity, exceptions and completeness" (1992: 174). In addition, in this conceptual first stage, feminist literature reviews not only "summarize the salient findings of pertinent studies and question the assumptions of the paradigm underlying the studies," they examine "the rhetoric used to appear to have found something" (Reinharz 1992: 149). Finally, feminist content analysis refers to the systematic examination of texts (and the processes of their production) with the aim of interpreting the themes contained therein (Reinharz 1992: 145).

In the data collection and analysis stage, other methods are useful. For example, in her year-long participatory research project with former battered women in New Mexico, Maguire (1987) lived in the community where the research was conducted and volunteered at a battered women's shelter. She initially used dialogue and interviews with participants to identify the problems they faced upon leaving a battered women's shelter and then formed an on-going support group for further problem-posing, analysis, investigation and resolution and later, collective analysis of the project itself (1987: 218-19).

Ellis (1990) also used an extensive range of methods for data collection and analysis in her participatory research project on the practices of adult education workers in the Caribbean. Her methods of data collection were document analysis, questionnaires, interviews, information discussions, diaries and participatory needs assessment workshops (1990: 26-7). At many stages of the research process, particularly in the workshops, "data analysis and interpretation were carried out simultaneously with data collection and each informed and reinforced the other" (Ellis 1990: 29).

Interviewing, particularly qualitative interviewing,¹⁰ is a research method, which is particularly favoured by participatory and feminist researchers. Qualitative interviewing allows the researcher to enter into and connect with the perspective of others and assumes that "the perspective of others is meaningful, knowable and able to be made explicit" (Patton 1990: 278). As Patton (1990) points out, the purpose of qualitative interviewing in programme evaluation, for example, is to understand

how participants view the programme, to learn *their* terminology and judgements, and to capture the complexities of *their* individual perceptions and experiences....The fundamental principle of qualitative interviewing is to provide a framework within which respondents can express *their own* understandings in their own terms (Patton 1990: 290; emphasis in original).

¹⁰ This is in contrast to quantitative interviewing, which uses such "closed" instruments as the standardized, structured interview or survey to fit research participants' knowledge, experiences, and feelings into the researcher's preformed categories (Patton 1990: 290; See also Kirby and McKenna 1989: 74).

Within the qualitative interview framework, semi-structured interviewing is a frequently used approach. At a descriptive level, semi-structured interviewing means that the researcher plans to ask questions about a given topic or theme. An interview guide of general issues to be explored may be prepared ahead of time, but the wording and sequence of the questions are not crucial (Patton 1990: 280; Reinharz 1992: 18). At a methodological level, adhering to feminist and participatory research principles means that within this type of interview framework, interaction and rapport between the participants and researcher would be fostered, the personal identity of the researcher would be invested in the process and the traditional hierarchical and detached stance of the researcher would be refused (Oakley 1981: 41; Reinharz 1992: 18). This is in direct contrast to the dominant paradigm of social science research which emphasizes the extractive, detached techniques of interviewing, as well as the lack of reporting of the process in the research results.

The conventions of research reporting require them to offer such information as how many interviews were done and how many were not done; the length of time the interviews lasted; whether the questions were asked following some standardised format or not; and how the interview was recorded. Some issues on which research reports usually do not comment are: social/personal characteristics of those doing the interviewing; interviewee's feelings about being interviewed and about the interview; interviewer's feelings about interviewees; and the quality of interviewer-interviewee interaction; hospitality offered by interviewees to interviewers; attempts by interviewees to use interviewers as sources of information; and the extension of interviewer-interviewee encounters into more broadly-based social relations (Oakley 1981: 31).

After reflecting on the above theories and practices of participatory and feminist researchers, I chose a range of different methods to examine my research question. First, I chose to do a case study of Canadian and Jamaican progressive NGO relations in order to explore the concept of North-South NGO partnership in a detailed, contextualized way.

Second, I chose to go to Jamaica in order to meet progressive Jamaican NGO activists and learn about their perspectives and the nature of their work. While, as a non-Jamaican and an outsider to the progressive Jamaican NGO community, I would never truly know "what it is like in Jamaica," I felt I would gain a more nuanced understanding of the nature of progressive Jamaican NGOs' work by meeting and talking to them in their own context.

Third, I particularly wanted to carry out qualitative interviews to gain a deeper understanding of how staff members of progressive Canadian and Jamaican NGOs, who work directly in the context of North-South NGO relations, viewed and understood the topic I had been researching within the context of the university. It was important for me to hear, expressed in their own words, how these staff members conceptualized North-South NGO partnership; practised decision-making and priority-setting at the programme level; assessed the Caribbean region and its future directions; and envisioned the role of progressive Canadian and Jamaican NGOs in influencing the directions taken. Within the qualitative interview framework, I planned to follow a semi-structured interview

format by asking a series of open-ended questions organized in a thematic manner¹¹ (See Appendices 1 & 2).

Fourth, I decided that I would complement my understanding of progressive Canadian and Jamaican NGOs' conceptions of partnership and their programming in the Caribbean gained through this qualitative research with feminist content analysis of NGO documents. I would collect NGOs' annual and periodic reports; strategic planning exercises; internal discussion papers; general mission and/or policy statements; programming documents and other relevant material made available to me.

Fifth, a feminist literature review of secondary research on the topic of North-South NGOs, North-South NGO partnership and Canadian-Caribbean relations would be undertaken with a view to examining the debate on these issues and identifying the discursive frameworks in which the debate is embedded.

Finally, I decided that keeping a thesis journal would be another research method used in this project. By keeping a research diary and "layering" my thoughts, questions, doubts, notes and assumptions about the research, as well as conversations and meetings during the process, I would be constantly able to account for myself and my changed perspectives and decisions in the research process.

¹¹See Patton (1991: 291-330) for a useful, albeit somewhat technical, guide to formulating open-ended research questions.

2.4 The Actual Process

The research projects of Maguire (1987) and Ellis (1990) gave me an ideal to follow for my own research. From the outset, I had hoped to make the research process as participatory in its approach as possible, in terms of problem definition, data-gathering, data analysis and results distribution with both the progressive Canadian and Jamaican NGOs. In the end, this goal was not attainable. I had to deviate from the ideal in a number of ways, as my research project was operating within particular external and personal constraints. Interestingly, what I have noticed is that the principal constraints -- time, cost and accessibility -- in carrying out such a participatory research project in a North-South context, mirror, in many ways, the constraints to participation evident in progressive North-South NGO relations. The following section outlines my actual research process and the ways in which I dealt with the limitations I experienced.

2.4.1 Identifying the Research Problem

She raises a lot of questions regarding the relevance of my particular research question and its level of innovation. I think I am going to have to rethink this whole thing (Personal journal, 12 October 1994).

My interest in the Caribbean was sparked in my first year at Carleton through contact with other Canadian researchers who had talked to me about their experiences in Jamaica and Guyana and their knowledge of the Sistren

Theatre Collective (STC)¹² and its work. My socialist-feminist leanings had already inspired a deep interest in understanding the "gendered" effects of economic restructuring and debt and exploring the modes of daily resistance and organizing by local women to change these conditions.¹³

As it happened, in the fall of 1993, I had the occasion to meet three members of Sistren in Ottawa when they were doing a Canada-wide tour. I was a participant in two of their popular education workshops on the gendered effects of globalization. Their message of the similarity of issues in Jamaica and Canada, within a context of global economic restructuring and debt, and their use of popular education methods to raise these issues inspired me. They impressed upon me the need to contribute to an understanding here in Canada of the commonality of these issues and struggles within the international economic system.

I wanted to learn more about Sistren and their work. Therefore, I developed a research proposal in which I focused on the Sistren collective and the evolution of their work as a discourse of resistance within the context of structural adjustment in Jamaica. As such, the initial definition of the problem and focus of study was identified by me, and not the NGO participants.

¹² The Sistren Theatre Collective is a Jamaica-based women's organization which uses drama and popular education to raise awareness of issues like structural adjustment and debt and their impact on low-income Jamaican women.

¹³ Much has been written on this issue, particularly by Caribbean feminist scholars (See Antrobus 1989; 1990; and Dunn 1991).

However, in large part due to the challenges posed in a methodology course I was taking, this focus began to trouble me. I questioned the usefulness of this research to Sistren. It felt like I was an outsider gazing in, "studying Sistren," when they were fully capable of internal reflection and self-evaluation. They had carried out their own internal studies, and had been the subjects of numerous external studies.¹⁴ Therefore, I searched for a more appropriate location of analysis and my topic underwent an evolution of sorts. As I wrote in my thesis journal,

It makes a lot of sense for me to locate myself and my research within the Canadian NGO aspect of the relationship between Canadian and Jamaican NGOs, like Sistren. A more comfortable fit in terms of my context, my motivations, my accessibility...(Personal journal, 16 March 1994).

I shifted my focus to Sistren's relations with their Canadian partners which had at one time been a consortium of six Canadian NGOs (CANCON). I decided to look at how this partnership with Sistren had evolved and whether it had brought about mutual organizational development. The first phase of the Sistren-CANCON partnership had been studied by Murchie (1990) and I thought I would look at the second phase of the partnership. However, I was determined to "foster participation" and seek input into this stage of the process. I phoned four NGOs in Ottawa and wrote to four NGOs in Jamaica asking for comments on and suggestions for my reworked proposal.

¹⁴ Internal studies include Ford-Smith (1989); External studies include Ferner (1986); Lambert (1982); and Wasserstrom (1985).

This process was a revelation in that it forced me to re-evaluate my expectations of full, uninhibited and enthusiastic participation in my research process. "It is one thing to decide for yourself about interest, appropriateness, accessibility and ethics; it is quite another to get interested parties to go along with your plan" (Lofland and Lofland as quoted in Kirby and McKenna 1989: 114). I found that my desire for participation and willingness to be flexible when seeking other's knowledge and input into my problem definition, came across as vagueness and sat in tension with the fact that many people in NGOs are overworked, pressed for time and needed to know specifics in order to help me with my research. They could not really "go through the process" with me as I had (somewhat naively) expected.

This being said, there was a significant amount of input from certain progressive Canadian NGO members in this second stage of redefining my research focus. I circulated my proposal and then informally interviewed current and former members of Inter Pares and MATCH-International in order to get feedback, as well as a sense of NGO staff's understanding of the key issues within progressive Canadian and Jamaican NGO relations. One person told me quite bluntly that my proposed research was "old history and had already been done" (Personal journal, 12 October 1994). She suggested that there were other interesting and far more useful questions like the reasons behind changes to Canadian presence in the Caribbean and the strategic choices progressive Canadian NGOs were making about partnerships.

In addition, I received letters from two progressive Jamaican NGOs, with one suggesting that I needed to be aware of the organizational changes that Sistren had recently undergone and that I would need to take this into account in my research. I incorporated this input and again redefined my research problem to its final incarnation, examining the process of partnership between progressive Canadian and Jamaican NGOs in the context of changing Canadian priorities in the Caribbean. When my topic went through this last change, I wrote to the two Jamaican NGOs who had originally responded to me and informed them of the changes because I wanted to maintain a high level of transparency in the research process.

2.4.2 The Interview Process

Once I had established the final research focus, making contact with all the NGOs for interviews was a lengthy process. The method of choosing the NGOs to participate in the study was based, in part, on the progressive NGO typology outlined in Chapter 3. That is, NGOs were chosen on the basis of their explicit empowerment agenda. My understanding of the power agendas of these progressive NGOs came from diverse sources: reading their documents and publications; listening to tapes from my advisor's doctoral research on the Inter-

Agency Working Group (IAWG) on the Caribbean;¹⁵ and getting suggestions from my advisor, based on his own experience, on who to contact.

In the end, five progressive, and in some cases, feminist, Canadian NGOs (Inter Pares; Oxfam-Canada; CUSO; MATCH-International; and the Canadian Catholic Organization for Development and Peace (CCODP)) who have been or continue to be active in Jamaica were contacted. Seven progressive, and in some cases, feminist, Jamaican NGOs (Sistren; Social Action Centre (SAC); CUSO-Caribbean; Association of Development Agencies (ADA); Save the Children Canada (CANSAVE); Groundwork Theatre Company (GTC); and the Saint Peter Claver Housing Cooperative) who had entered into partnerships with progressive Canadian NGOs were also contacted. As well, Judith Wedderburn, a member of the Association of Caribbean Economists (ACE), was contacted, as I wanted to gain a greater understanding of the current development model in Jamaica.

All progressive NGOs were originally contacted by a letter which outlined the nature of the project, the other NGOs to be contacted and a request for an interview. This was followed up with phone calls, asking again about the

¹⁵ The Canadian IAWG on the Caribbean has since dissolved. Its members were Save the Children Canada, Canadian Catholic Organization for Development and Peace, CUSO, Inter Pares, MATCH-International and Oxfam-Canada (Murchie 1993: 13). However, a small core of the IAWG members regularly work together, on an ad-hoc basis, on programming of common interest. The tapes were from a three day IAWG meeting (July 1992) which brought together Canadian members and Caribbean partners. They form part of Kevin Murchie's research material to which he permitted me to listen in order to gain a better understanding of the issues that the Canadian and Caribbean NGOs had been addressing.

possibility of an interview. In all, staff from four progressive Canadian NGOs, four progressive Jamaican NGOs, one Caribbean NGO and one Jamaican individual agreed to be interviewed.¹⁶ When the interviews were confirmed, all NGO participants were sent complete information (in the form of a research proposal) about the purpose of the project and the interview guide. At the interview, all participants were given consent forms that had been approved, along with the proposal and interview guide, by the Carleton University Ethics Committee¹⁷ (See Appendix 3).

Interviews were carried out with personnel of the four progressive Canadian NGOs in January and April 1995 and personnel of progressive Jamaican NGOs in Kingston, Jamaica in February 1995. All of the interviews, except for two, were taped and then fully transcribed. One interview was carried out over the phone. One participant requested anonymity.

Conducting interviews was the richest and most enjoyable experience of the research process. I had the opportunity to share ideas with people who had similar interests. More important, I learned a great deal about the complexities of progressive NGO relations and the current challenges of "doing development"

¹⁶A list of NGO staff which participated in interviews for the research project may be found at the end of the thesis.

¹⁷It is a requirement for all Carleton University students who are conducting research with human subjects to seek approval for their research from the Carleton University Ethics Committee. The requirements include putting together a proposal, draft questionnaire and letter of informed consent. Approval usually takes two to three weeks. It is a useful process for the researcher because it clarifies the responsibilities that the researcher has to the research participants.

in a changing global context from people who experience these complexities and challenges daily and who seemed to enjoy the opportunity to reflect upon them. It was particularly interesting to see the similarities of certain reflections and issues, both North and South, as well as the notable differences

In addition, the interviews provided me with a "reality check" in that they confirmed some of my assumptions and equally caused me to rethink others. I was able to carry this rethinking process through into other interviews, and as a result, the context of inquiry seemed to broaden and deepen with each interview. The interview process provided me with an organic quality of information that I would never have obtained from purely secondary research.

However, there were some constraints in the interview process. I had been quite nervous during the first interviews, which usually manifested itself with me doing a good deal of talking. Kirby and McKenna (1989) discuss the dynamics of "interviewing up" (1989: 67). Although in many traditional research situations, the power differential rests on the side of the interviewer, I experienced anxiety at "not wanting to appear stupid or ask stupid questions" while interviewing people I knew had much greater experience and knowledge in the matters we were discussing. One participant in Jamaica remarked on the tension she sensed in me and we discussed it quite openly, with her urging me to relax.

I also experienced anxiety over the issue of researcher neutrality within the political context of the research process. An earlier conversation in Ottawa with a Caribbean NGO member had sensitized me to the political context of North-

South NGO relations and the role of the researcher in this context. I was aware that as a Northern researcher, I was gathering information from each of the NGOs as I moved back and forth between Canada and Jamaica. This has implications and responsibilities for the researcher when one group of NGOs are funders and the other group of NGOs are recipients of those funds. Was I to act as a source of information if a situation arose where I was asked something that I had not been told in confidence but that could have political implications? Oakley (1981) addresses this dilemma in the context of answering personal questions and questions about the research (1981: 47-8). Her situation did not entirely fit the one I was in because I felt relations between NGOs could be affected by answering certain questions. I decided to be flexible and judge the political implications of each situation on its own, and in the end, this seemed to work.

In addition, unfortunately but understandably, lack of time in the interviews was a constraint to the quality of information obtained. Since most NGO participants had only an hour or so to devote to the interview, there was not enough time to explore in great depth all of the topic areas I would have liked to cover. As it was, there were times when it was impossible to cover all the questions in the interview guide and I had to pick and choose certain key ones.

2.4.3 The Fieldwork

In carrying out my fieldwork in Jamaica, I was constrained by the factors of time and cost. I could only go for two weeks (reading week) in February 1995 as I could not afford to give up my teaching assistantship and conduct research for a longer period of time. The fieldwork was self-financed, except for a contribution from the Graduate Studies Research Fund. Because I experienced feelings of guilt for going to a "vacation spot" for such a short time during the Canadian winter, I was determined to do as much work as possible (interviewing and researching at the University of West Indies) while I was in Kingston and make the short time spent as "legitimate" as possible.

While I was excited about meeting the NGO members I had spoken to on the phone, who had seemed very interested in the research, I also felt nervous about spending two weeks alone in Kingston, a city of extremes of wealth and poverty where racial, class and political tensions play out regularly in certain areas. Before leaving and in my first few days there, I struggled with two conflicting self-interpretations of my own tension: that it was natural, part of going somewhere which had a reputation for being dangerous, or that it was a manifestation of an internalized racism which I needed to examine. I do not know if I came to any clear conclusions on this, but I do know that it was an important struggle because it forced me to examine what it means "to be white" and to be a tourist, particularly in a society where to be a white tourist means benefitting from conditions which marginalize many local people. It made me

understand, on a personal level, the assumptions, privileges and responsibilities for change that go along with such an identity.

On my second day in Kingston, I was given a gift which continues to resonate very strongly within me. After my third interview of the day, I was chatting with the person I had interviewed, discussing who I knew in the city. She suggested I meet some of her friends and then invited me to stay with her and her family outside of Kingston for the remainder of my stay. The ten days I spent with them and the talks she and I shared served to enrich my research process and my own learning experience in Jamaica beyond words. Much of what was discussed needed to remain confidential, but I learned things that will inform my thinking and behaviour if and when I am working in a progressive NGO setting. This experience also allowed me insights into aspects of Jamaican culture and daily life that I would never have experienced otherwise. Kingston became a place where people carry out their everyday lives, buy bread, share a drink with friends, go to the bank or to school. This experience enriched my life and gave me friends I cherish.

2.4.4 Writing It Up

The responsibility for data analysis and compilation rested solely with me. During the interviews, participants were asked whether they would prefer to receive a copy of the transcript to check for clarification and accuracy or a draft of the chapters which included their contributions to examine before the chapters

were finalized. All elected to see a draft copy of the chapters which contained their input.

In terms of results distribution, upon completion, all participants will receive a final copy of the thesis. There is the potential problem that while the final product fulfils my needs of obtaining my Master's degree, in its present form, it may not be that useful to the NGOs which participated in the study. That is, a certain academic format and reporting procedure is required for theses to be considered acceptable at Carleton University and this format may be less than ideal for NGO use. To get around this constraint, I plan on presenting the research findings in a more accessible and shortened form in NGO and alternative media publications.

2.5 Limitations to the Research

The limitations of the research have to do with its participatory and feminist nature. First, I initiated the project and decided who participated and throughout, I was its driving force. Also, the North-South context in which the research took place and my personal "location" in the North created certain constraints to how I carried out my research. These constraints of restricted time, financial cost and geographical distance all had an impact on the relative nature and extent of Canadian and Jamaican NGOs' participation in the project.

The most noticeable result of these constraints was greater Canadian than Jamaican NGO input into the research. Progressive Canadian NGOs' greater

participation in the early stages of my project was directly related to their greater proximity to me, the ease and frequency with which I was able to contact them and the familiarity that comes with meeting and speaking often to people. In addition, staff turnover in many progressive Jamaican NGOs at the time I sent out my first letters had much to do with their initial lack of response to my research project. Also, the expense and my own sense of not wanting to "bother" them (after learning from my experience of calling Canadian NGOs about an ill-defined project) prevented me from following up those initial letters to progressive Jamaican NGOs with phone calls.

I regret that I was not able to obtain the same level of input into my project from progressive Jamaican NGOs until I was in Jamaica and by that time, my project was well-defined. And even then, I could only spend a short amount of time with each of the participants. However, from the level of enthusiasm about my project that I perceived from progressive NGO staff once in Jamaica, I can conclude that the lack of initial response did not equal lack of interest.

Second, in the process of wanting to be open to what NGOs were saying, my topic underwent a fairly substantial change in direction. One line in my thesis journal reads, "I have lost all sense of what is particularly feminist about my proposed research" (Personal journal, 25 October 1994). I redefined my research topic away from a focus on Sistren and, as such, the explicitly feminist content of my topic seemed to disappear. Strictly speaking, the research is no longer starting from the perspective of women's lives and thus, does not

have the same potential of contributing to changing the status quo of gender relations.

Conclusion

The field of development studies has traditionally been problematic in both its conceptual frameworks and its hierarchical approaches to gathering information. On the other hand, feminist and participatory research methodologies offer some alternative theoretical approaches and practical methods. In the case of my research project, I cannot say unequivocally that it has been either truly participatory or feminist, although I can state that the research is underpinned by important elements of both.

In the final analysis, I would say that this research project has been participatory in terms of its reflection of important participatory principles and methods in the research process. I tried to participate "with" the NGOs involved as much as I could, not solely conduct research "on" them, and I feel I succeeded, particularly at the problem identification stage. I tried to remain open and willing to change based on what I learned and ended up focusing on a question that was deemed to be "useful" to NGOs. The research may also be characterized as participatory in terms of its overall contribution. Many of the NGO participants said they liked the project, characterizing it as a "good case study" and stated that they were looking forward to obtaining and using the results. In particular, one Jamaican participant said she was going to discuss my project at an international

NGO forum in June, while others suggested that I send it to regional NGOs in the Caribbean. I feel this research could be used to inform NGOs' future processes of policy formulation and implementation, particularly around issues of guidelines for partnership and mutual priority-setting and decision-making.

In addition, despite the fact that the resulting project is not what I set out to do in terms of feminist research, I do feel that there are feminist elements to the work. My analysis is informed by a feminist approach in that concepts of gender and power have been incorporated into the framework of examining progressive Northern and Southern NGOs, their relations and their programming. In addition, three of the NGOs involved in this study are explicitly feminist organizations, while others incorporate the concept of gender as an organizing principle of their work. Finally, the research methodology itself has internalized many of the principles of feminist research.

In the end, I have learned by doing, and that, I feel, is what research is ultimately about. I have learned that constructing a participatory research project in an international context requires a substantial investment of time and a commitment to forward planning. I needed at least a year to establish contact, gather information, carry out informal interviews and arrange and conduct formal interviews with members of the progressive Canadian and Jamaican NGO community. Since I knew I had only two weeks in Jamaica and many things I wanted to do, the need to be well-organized and have clear priorities and back-up plans was even more crucial. This type of research also requires a measure of

financial investment, particularly if the researcher wants to conduct fieldwork for any meaningful length of time.¹⁸ Ideally, I think a potential researcher should volunteer or work for an NGO to be able to gain a real sense of what key issues need to be investigated and to establish credibility within, and commitment to, the NGO community. Finally, research of this nature entails a great deal of persistence, patience, adaptability and flexibility on the part of the researcher and a commitment to the notion of process.

¹⁸ I found that I needed approximately \$1500.00 to carry out the research I wanted to do for the year.

Chapter 3: Demythologizing NGOs

Introduction

As outlined in Chapter 1, in light of the challenges facing the nation-state and official aid agencies in fostering sustainable development, NGOs have become popular subjects of debate and frequent targets of policy initiatives. The debate reflects a number of perspectives and often centres on the most legitimate role of NGOs in meeting these development challenges. While one perspective advocates a secondary role for NGOs in assisting states and official agencies to "achieve" development, another advocates NGOs as agents of resistance to these official purveyors of development. A third perspective envisions NGOs as key actors that operate on the edge of civil society, simultaneously urging state reform and building the capacity of more marginalized groups in civil society to undertake their own development (MacLean 1993: 10-13). However, what the debate on the "role of NGOs in development" lacks is a challenge to the myth that NGOs are a monolithic group of actors in this development process.

In this chapter, I first briefly review the changing discourse of development of key members of the aid regime¹⁹ which has broadened to focus on

¹⁹ This term comes from Wood (1986). He characterizes the aid regime, led by such bilateral and multilateral aid institutions as USAID, (and I should add, CIDA), and the World Bank as sharing a set of principles, norms, rules and procedures about "the conditions that should govern access to concessional external financing and about the general type of development such access should promote" (1986: 101). This includes development assistance or loans extended on the normative condition of implementing market reforms, usually through structural adjustment programmes, to create an enabling macroeconomic environment for market- and private sector-led development. However, it should be acknowledged that like any group of actors, the

empowering local communities, facilitating their participation in the development process and building the capacity of their civil society organizations. Second, I examine how participation has been conceptualized within the aid regime discourse of development. Third, I examine how NGOs have been conceptualized within this discourse and argue that this conceptualization has largely been one of NGOs as a uniform group of cost-effective "policy-facilitators."

Fourth, I proceed to review theories of the evolution of NGOs to construct a framework which outlines important points of differentiation among NGOs based on programming strategies, philosophies of development, strategic orientation and gender. Fifth, this portrait of a heterogenous NGO community lays the groundwork for an exploration of a typology of progressive versus conventional NGOs on the basis of power agendas and approaches to participation. I conclude the chapter with the observation that while progressive NGOs' approaches to participation have been explored at the local level, less study has done of their approaches to participation at the North-South NGO level.

aid regime is not monolithic and that there may be differences among members of the aid regime in terms of levels and nature of support for particular policies. See CIDA (1994c) for its current position on economic reform in developing nations.

3.1 The Changing Discourse²⁰ of Development and Power

The Northern-based, dominant paradigm of development has been characterized as "the theorization (or rather, ideologization) of its own path of development" (Nederveen Pieterse 1991: 6). Grounded in the ostensibly universal notion of a unilinear progression of economic and social change, the dominant development paradigm put forth that key inputs of capital, technology and infrastructure would guarantee outputs of economic growth and progress. States and elites, not the poor, were seen as the key agents for initiating the modernization development process (Macdonald 1994: 4). Critics of this model argue that, conceptually, achieving development has been understood in terms of maintaining power and control over natural and economic resources (Macdonald 1994: 2; Shiva 1988: 3). They argue that, in reality, development has been achieved by exercising power over the more marginalized peoples of the South and claiming progress at their expense (Shiva 1988: 2).

This dominant paradigm of development as power-over is being challenged, particularly by Northern and Southern feminists, who envision development as power-with and power-to. Development is conceptualized as a dynamic, political process involving the empowerment of women, men and their organizations which

²⁰ Discourse has been defined as "a historically, socially and institutionally specific structure of statements, terms, categories and beliefs." It is the site "where meanings are contested and power relations are determined" (Parpart 1991: 2). It is important to note that, while I am referring to a dominant discourse of development, I acknowledge that there is diversity within this discourse. While the analysis of a particular discourse is useful at an abstract level, I recognize that there is the danger of oversimplification.

have been marginalized by various forms of structural oppression and by the dominant development model itself. It is an organic process of building the capacity of women, men and their communities to actualize their own development (CCIC et al. 1991: 16-19; Sen and Grown 1987: 80). "Empowerment is about creating the conditions under which the poor can meet their daily needs and become actively involved in defining and promoting their own social and political projects" (CCIC et al. 1991: 22). Thinking of development as empowerment involves redefining the former goals of domination and control over economic and natural resources towards "building problem-solving and conflict-resolution skills; strengthening organizations; and building individual and collective skills and solidarity" (CCIC et al. 1991: 20).

3.1.1 The World Bank and CIDA: Discourse of Development

Both the critique of the modernization paradigm of development and evidence of the worsening economic, social and environmental conditions in many countries of the South, have led many organizations to rethink their traditional views on development. Even the World Bank discourse of development, which has traditionally privileged such principles of neoclassical economics as economic growth, trade liberalization, increase in GNP, privatization and economic efficiency (Nederveen Pieterse 1991: 13) has broadened to incorporate such issues as participatory development and environmental sustainability (World Bank 1992a; 1992b).

Current CIDA policy documents also illustrate a broadening of the development discourse to incorporate such issues as poverty reduction and democratization within a broadly defined framework of sustainable development. Since 1991, CIDA programming has been operating within a sustainable development policy framework which rests on the "five pillars" of economic, social, cultural, environmental and political sustainability (CIDA 1991). Recently, the agency has formulated a series of policy statements on poverty reduction, economic reform and private sector development (CIDA 1994c; 1994d; 1994e). These policy documents are intended to guide CIDA programming in the area of economic sustainability, with poverty reduction providing the focus for strategic programming in the other two areas (CIDA 1994d:2).

CIDA has also formulated a policy statement to address human rights, democratization and good governance in the context of promoting sustainable development. It is within this context that CIDA discourse focuses on the role of actors in civil society. Agency objectives include strengthening civil society organizations to promote popular participation in decision-making and protect human rights, and building the capacity of democratic institutions, the public sector and political leaders to govern effectively and justly (CIDA 1995: 3).

People's participation is one key component in the broadened discourse of development. While participation is a central concept in development discourse, there is little consensus about what it actually means. The next section will briefly

review the main theoretical perspectives of participation, as well as highlight how participation is conceptualized in World Bank and CIDA discourse.

3.2 Theories of Participation

Participation theorists have distinguished two broad perspectives on the role of people's participation in development processes. One school of thought conceptualizes participation in technical terms, as an input whereby people would be included in development projects, thus ensuring a greater chance of project success (Oakley et al. 1991: vii). In other words, it refers to the mobilization of people to implement projects (Ghai 1988: 4). They are "taking part" in activities, by contributing their resources, labour and time, but the actions have been decided upon from above for their benefit (Desai 1994: 171). In this context, participation is looked at as a means to an end, a contribution and as a passive act (Oakley et al. 1991: 6-7).

The second school of thought looks at participation in political, structural and empowerment terms. That is, it is conceptualized as a process whereby people who are poor, marginalized and have traditionally been excluded seek to increase their influence and gain access to resources to improve their standard of living (Oakley et al. 1991: vii). In this context, participation is seen as an end in itself, as an act of empowerment and as an active form of engagement and organization (Oakley et al. 1991: 8-9).

Participation has also been analyzed according to its potential contribution to development on the basis of its scope of operation, originating agent and moment of introduction (Goulet 1989: 166-7). According to Goulet (1989), the most indispensable form of participation for authentic development must make the transition to the macro-arena of decision-making. This form of participation

starts at the bottom and reaches progressively upward into ever widening arenas of decision-making. It is that form of participation which is initiated, or at least ratified, by the interested non-elite populace at an early point in the sequence of decisions. It matures into a social force wielding a critical mass of participating communities now enabled to enter into spheres of decision or action beyond their immediate problem-solving (1989: 168).

3.2.1 The World Bank and CIDA: Discourse of Participation

As mentioned earlier, the discourse of development of the World Bank has been broadened to incorporate the concept of participation.²¹ However, analysis of World Bank documents illustrates that it is an instrumentalist, apolitical concept of local-level participation as a means to an end and as contribution that has generally been advocated in World Bank discourse. The Bank asserts that increased emphasis on local-level participation offers hope for more successful

²¹ Rahnema (1992), however, questions the motives for the inclusion of the concept of participation in World Bank discourse. He outlines six reasons why this concept is receiving such unprecedented interest: it is no longer perceived as a threat; it has become a politically attractive slogan; it has become, economically, an appealing proposition; it is now perceived as an instrument for greater effectiveness as well as a new source of investment; it is becoming a good fund-raising device; and an expanded concept of participation could help the private sector to be directly involved in the development business (1992: 117-19).

and sustainable development because "projects are more successful if they are participatory in design and implementation" (World Bank 1992b: 94). Three main advantages of participatory approaches to development are noted in particular:

(a) they give planners a better understanding of local values, knowledge and experience; (b) they win community backing for project objectives and community help with local implementation; and (c) they can help resolve conflicts over resource use (World Bank 1992b: 93).

The Bank's instrumentalist view of community participation is apparent.

Participation is conceptualized purely as a means to achieve project success by better informing planners, reducing potential conflict and distributing the workload. Conceived of in this way, it may be argued that participation is primarily a "manipulatory" tool aimed at "making people achieve development" (Esteva 1985: 77). Participation as a goal, for the empowerment of the participants does not factor into this discourse. It is not conceptualized in terms of empowering the marginalized to decide for themselves how to use resources to improve their conditions of life or to take part in broader arenas of decision and policy-making.

The incorporation of the notion of community participation into World Bank discourse must also be assessed against the backdrop of structural adjustment programmes (SAPs) and their focus on economic efficiency and fiscal conservatism. The Bank states, "[o]nce national priorities and policies have been set, it is often cost-effective to solve problems at the local level" (World Bank 1992b: 92).

CIDA discourse has also prioritized the concept of participation in development efforts. Its treatment of participation is more complex than the instrumentalist view held by the World Bank. The agency has attempted to move away from a purely technical, project-level approach to participation toward a more political, macro-level approach.

An internal review of CIDA's experiences in participatory development suggests that certain CIDA policy-makers have traditionally treated "participation solely within the context of projects" and defined it as a means not an end (Beaulieu and Manoukian 1994: 12-13). Its authors further note that, generally, CIDA has addressed most of its participatory development initiatives at the micro level (Beaulieu and Manoukian 1994: 34).

However, Beaulieu and Manoukian (1994) attempt to define participation within the context of CIDA programming more broadly by arguing that CIDA needs to plan interventions which address participation at the micro (sectoral and community development), at the meso (capacity development and institutional support), and at the macro (human rights, good governance and democratic processes) levels (1994: 34). They present a framework whereby participation would be integral to CIDA's objective of strengthening civil society and promoting democratic development.

[P]articipatory development would not only be a characteristic of projects at the micro level but an approach that would encompass all stages and levels of the development process. From this perspective, initiatives at the local level have to be complemented by interventions to strengthen the capacity of partner institutions and fit into a democratic environment to maximize results (Beaulieu and Manoukian 1994: 3).

While this emphasis by aid regime members on increasing community participation in development processes ranges from a purely instrumentalist approach to a more empowerment-oriented approach, one point stands out clearly. Within current development discourse, there is an increasing focus on NGOs as facilitators of this participation. The next section will review the qualities which supposedly set NGOs apart from official development actors in this regard. Acceptance of the general applicability of these qualities to all NGOs has constructed the myth of an homogenous NGO community. The next section will review the various ways that this myth has been incorporated into the discourse of development put forth by official actors in the aid regime.

3.3 The Myth of the Homogenous NGO Community

In much of the literature on the role of NGOs in development, the "NGO community" is generally distinguished from official aid agencies and the private sector on the basis of its unique development philosophy and methods. Malena (1995) states that the NGO sector may be associated with a particular development approach attributable "on the one hand, to its inherently small-scale and decentralised nature and, on the other, to its voluntary, value-driven base" (1995: 10). Malena (1995) also states that the sector has several distinguishing ideological components which feature a commitment to: grassroots, self-reliant, and people-centred development; structural analyses of development problems; and policy action to alleviate these problems (1995: 10-11). In addition, Korten

(1987) cites a desire for democracy as a distinguishing feature of the general NGO community. "NGOs are more likely to have a natural interest in democratization and face fewer organizational constraints in undertaking actions consistent with its achievement" (1987: 146).

Certain characteristics are held up as being particular to the NGO community at large. Brodhead et al. (1988: 29) outline the "articles of faith"²² -- altruism, autonomy, participation, efficiency and cooperation -- which I would argue construct the foundation of the mythical NGO community. They are recited without fail in descriptive endorsements of NGOs within the discourse of development of aid regime members. "[D]onor governments and multilateral institutions now routinely pay tribute to [NGOs'] presumed capacity to reach the poor and to the qualities of innovation and flexibility which is supposed to characterize NGO work" (Brodhead 1987: 1).

3.3.1 The World Bank and CIDA: Discourse of NGOs

The World Bank is one of the multilateral institutions that endorses NGOs on the basis of the above mythical qualities. In particular, the Bank (1992b) pays tribute to the following characteristics of NGOs.

22 These "articles of faith" of Canadian NGOs were articulated in a survey which was part of a two year study done by the North-South Institute in 1985. The results of the study may be found in Brodhead et al. (1988).

Among the strengths of community groups and NGOs are their ability to reach the rural poor in remote areas and to promote local participation; their effective use of low-cost technologies; and their innovativeness (1992b: 97).

With the 1988 adoption by the Bank of policy guidelines of collaboration with NGOs, the involvement of NGOs in Bank-sponsored development projects has tripled. By 1990, 50 Bank projects included NGO participation (Williams 1990: 31). A study on NGO-World Bank collaboration indicates that this trend of expansion is continuing. There is a "sharp rise in the number of projects under preparation in which Bank staff see potential for NGO involvement" (Salmen and Eaves 1991: 96-7).

However, World Bank endorsement of the cost-efficient, innovative and participatory nature of NGOs must be examined within the context of SAPs. The Bank has stated in its policy guidelines for NGO-World Bank collaboration that "a role for NGOs may be among the measures of an adjustment programme, especially concerning the social dimension of adjustment" (Cernea 1988: 44). Critics argue that, as conceptualized by the World Bank, NGOs' function is one of "policy-facilitation" whereby they "help mold national policies in conformance with the tenets of Western economic liberalism" (MacLean 1993: 9-10). This ideal policy-enabling role of NGOs is understood to be twofold. First, it is to implement national policy objectives, often synonymous with SAPs, at the local level and provide central policy-makers with information about local needs and conditions. Second, it is to assist in mitigating the social costs of SAPs (MacLean 1993: 9). Often, this has meant that NGOs "become the preferred channels of aid

in sectors such as health and education that were previously managed by governments"²³ (Mihevc 1994: 12).

CIDA has worked with NGOs through its Partnership Programme, as well as through its bilateral and humanitarian assistance programmes.²⁴ While the agency has been part of the aid regime consensus on the necessity of implementing SAPs in indebted Southern nations (Burdette 1994: 211), its conceptualization of the ideal role of NGOs is more multifaceted and not solely reflective of the notion of NGOs as facilitators of SAPs. On the one hand, CIDA documents (1993b) illustrate that the agency envisions a role for NGOs in supporting CIDA initiatives for macroeconomic reform in, for example, the context of its Caribbean regional development programme (1993b: 5). On the other hand, NGOs have long been recognized as important actors in promoting CIDA's priority of partnership by building linkages and awareness between Canadians and people overseas. More recently, CIDA's view is that NGOs are key actors in implementing its goal of building civil society to promote democratic development, human rights and good governance. As outlined in CIDA (1995),

²³Indeed, service delivery is considered by Bank staff to be NGOs' greatest contribution to development efforts. Fully 40% of Bank projects use NGOs in this role, particularly in the population and health sectors, while 31% of Bank projects employ NGOs as contractors, usually for infrastructure projects (Salmen and Eaves 1991: 115 & 120). This is in contrast to 5.5% of Bank projects which include the involvement of NGOs in a policy advocacy role (Salmen and Eaves 1991: 111).

²⁴Between 1988-9 and 1992-93, NGOs accounted for 21% of total CIDA disbursements for which the agency had direct operational control (CIDA 1994b: 5).

NGOs are "key vehicles in articulating popular concerns and channelling popular participation in decision- and policy-making" (CIDA 1994: 4).

Notable in this discourse is the focus on the different roles of NGOs, but not the differing nature of NGOs which shapes their acceptance of and adherence to these prescribed roles. The myth of a monolithic NGO community suggests that NGOs are "different from" other actors in the aid regime on the basis of generalized and, usually, neutral qualities. This myth masks the fact that there are very real differences *among* NGOs over such issues as the policies of the World Bank and CIDA and the most effective way for NGOs to relate to these official agencies. As Murphy (1991) states "these qualities...say little about how [NGOs] see the world or the future" (1991: 192). Macdonald (1992) argues that the differences among NGOs occur particularly at the level of politicization and participation.

NGOs display very different understandings of what participation means and how it is to be achieved. The problem of dominant models of development has not been that the concept of participation has been entirely lacking, but that it has been marginalized and depoliticized. Most NGOs have contributed to this process by accepting the apolitical vision of NGO work. (1992: 1).

The work of these and other authors forms part of the body of literature which has been devoted to developing theoretical frameworks for differentiating NGOs. These frameworks will be outlined in the next section

3.4 The Heterogenous NGO Community: Theoretical Frameworks

Although many NGO theorists acknowledge that categorizing NGOs runs the risk of oversimplifying their multiple activities, many have developed analytical tools to help differentiate among NGOs. The central point which may be drawn from this literature is that there exists a range of NGO types.

Differences among NGOs are based on *choices* they make, grounded in a particular worldview and informed by relations and alliances with local groups, about the nature of their role, their activities and their overall political strategy.

Many frameworks have been used to categorize international NGOs and their activities. The most conventional method distinguishes five categories of overseas activity: relief and emergency assistance; development assistance projects; placements of personnel; material assistance; and child and family sponsorship (Murphy 1991: 174). A second framework differentiates NGOs according to their mode of operation and the forms their assistance takes: implementing projects in the field; raising project funds to be channelled to an international parent for implementation; providing funding and resources to support the work of overseas local partners; placing personnel overseas with local institutions (government or para-statal) or local projects; promoting development education in Canada; and advocating solidarity activism (Murphy 1991: 175-6).

However, these frameworks restrict their focus to NGOs' actions, and do not address the goals and rationale behind these actions. They are also "essentially descriptive and donor-centred" (Murphy 1991: 174). They lack an

historical and geographical specificity which limits their usefulness in illuminating how differences among Northern and Southern NGOs have evolved. "Each NGO has a history, an impetus, an experience, and a structure, including a funding base, that reinforce the basic activity in which it is engaged" (Murphy 1991: 184).

Historical origins and motivations, links to international organizations and unequal access to resources have resulted in significant differences between Northern and Southern NGOs. Northern NGOs, many of which were part of the original project of colonization, tend to enjoy high visibility and consultative status with the U.N., official development agencies and other policy-making bodies. They have more resources, gained from both government and/or private sources, than their Southern counterparts (Antrobus 1987: 96; Macdonald 1992: 3). On the other hand, Southern NGOs often grew out of a long history of local organizing and voluntary activity and gained impetus as part of nationalist movements of the time (Baker 1993: 346). They have attained a more recent "formalized" status and the accompanying problems of funding (sources, procedures and priorities), absorption capacity, vulnerability and dependency on external donors (Antrobus 1987: 96). These geographical, historical and economic differences between Northern and Southern NGOs often result in power differentials.²⁵

²⁵ These differences of power will become significant in the later discussion on North-South NGO partnerships.

The aforementioned conventional frameworks are also limited in their usefulness because individual NGOs often incorporate a range of activities; what distinguishes them is the emphasis they place on the types of action they undertake (Murphy 1991: 174-6). Thus more useful theoretical frameworks have been created in an attempt to incorporate such qualitative variables as programming strategies, philosophies of development and strategic orientation to explain the evolution of NGOs' activities.

One of the most well-known typologies of NGOs is that created by Korten (1987, 1990). Korten has outlined four orientations or "generations" in NGO programming strategies (welfare; local development; sustainable systems; solidarity networks) based on NGOs' own analysis about changing needs gained from learning experiences in the field.²⁶ While he acknowledges the possibility of multiple strategies co-existing within a given NGO, Korten (1987) distinguishes his four "generations" according to such defining features as problem definition; time frame; spatial scope; chief actors; development education; and management orientation (1987: 148).

²⁶Murphy (1991) puts forth a useful critique of Korten's framework. He argues that Korten has grounded his analytical framework of NGOs' changing programming strategies solely in the changing experiences of NGOs themselves and not in the changes in conditions and experiences of the poor. This model has an insular, institutional perspective and does not focus on the differing quality of NGOs' relations with local groups in developing strategies (1991: 177).

As individual NGOs have grown in sophistication regarding the nature of development and the potentials of their own roles, many have undertaken increasingly effective strategies involving longer time perspectives, broadened definitions of the development problem, increased attention to issues of public policy and a shift from exclusively operational to more catalytic roles (Korten 1987: 147).

Elliot (1987) uses a continuum model when he distinguishes three NGO programmatic approaches (welfare; developmental; empowerment) on the basis of NGO behaviour and attitudes towards development (1987: 57-8). This framework, based on "differing views and practices of development" is also adopted by Therien (1991) who argues that the "NGO community thus reflects the complex evolution of development theory"²⁷ (1991: 273). The particular strength of Elliot's (1987) analysis is that, unlike Korten, he does not assume an increasing level of politicization as NGOs move along the spectrum of behaviour. He notes the interrelation of approaches and co-existence of power and welfare strategies within organizations and the resulting difficulties and conflicts within agencies, particularly around issues of fundraising and resource allocation, on which approach to place the most emphasis (1987: 58-9).

Brodhead (1987) modifies Korten's framework to focus on different strategic orientations of NGOs whose various activities fall within the three basic functions of service delivery, education and public policy. This is a useful

²⁷ As Brodhead and Pratt (1994b) note, there are significant ideological differences among NGOs which stem from their theories of change to promote true development. They distinguish among mainstream liberal, reform and solidarist NGOs on the basis of their understanding of the obstacles to development and the processes necessary to remove these obstacles (1994b: 94).

framework at a strategic level because it serves to "clarify the critical choices facing NGOs" (Murphy 1991: 177). Brodhead (1987) argues that what distinguishes NGOs from one another is the emphasis (grounded in a maturing critical analysis of the causes of underdevelopment) they place on activities within the three different functions according to whether they prioritize a welfare, developmental or empowerment role (Brodhead 1987: 2-3). However, he recognizes all these functions as legitimate and necessary. With changes in thinking about development and its obstacles, has come a shift in the balance within NGOs between these functions and a change in the specific development programming that serves them (Brodhead et al. 1988: 5). As such, welfare-oriented Northern NGOs would concentrate on the provision of relief, the dissemination of general information about projects in the Third World and advocacy for increased ODA and NGO funding. Developmentally-oriented NGOs would prioritize the implementation of self-help projects, analysis of the structural links of Northern and Southern political economies and advocacy for fair trade and other policies to facilitate Southern development. Empowerment-oriented NGOs would emphasize the facilitation of local-level development activities, discussion of global development options and advocacy for supportive policies and institutions at the macro level (Brodhead 1988: 2-5).

However, most of these kind of frameworks, while capturing some aspects of the differential nature of NGOs and their programming approaches, are problematic in that they do not incorporate the variable of gender. They focus on

the movement of NGOs along the spectrum from delivering services to, and learning from, the changing needs of "target groups," to empowering "communities" and "villages," without any reference to the differential experiences, needs of, and outcomes for women and men, within these groups. As Baksh-Soodeen (1993) notes, "The argument has been that NGDOs are ahead of governments and bureaucratic development agencies in responding to the needs of the marginalized who are their primary constituency. The evidence shows, however, that malestream NGDOs replicate the biases of governments and development bureaucracies on the issue of gender"²⁸ (1993: 32).

Researchers have indicated the implications of this male bias on NGO projects, programmes and internal structures. Hatley (1993) focuses particularly on Northern NGOs and argues that male bias affects NGOs' organizational structures, staffing composition, research systems, funding and evaluation mechanisms and that this limits their ability to engage in empowering relations with Southern women's organizations (1993: 57-74). Yudelman (1987) notes that cultural biases regarding women's "proper" gender roles, held by Northern and Southern NGOs of all stages, results in women's exclusion from NGO-initiated agricultural credit schemes and inclusion in income-generating projects which emphasize their role as "homemakers" (1987: 180-2). Macdonald's (1992) study of a range of Costa Rican NGOs "illustrates that even

²⁸Baksh-Soodeen (1993) uses the acronym NGDOs to refer to non-governmental development organizations. She defines "malestream" NGDOs as mainstream NGDOs which represent "interests other than women's" (1993: 1).

the most 'progressive' NGOs have, in many cases, failed to address the specific problem of women's participation" (1992: 5).

3.5 Progressive and Conventional NGOs: Participation Revisited

What distinguishes a neoconservative wave of NGOs from an NGO movement committed to promoting the leadership of popular groups lies in how they view the problem of power (Concertacion as quoted in Macdonald 1992: 20).

Some theorists have moved away from analyzing NGOs using purely linear frameworks. While "generational" models may be useful at the descriptive level, they are less than useful at the strategic level and in capturing the complexities of NGO realities. Authors who are exploring alternatives have developed conceptual frameworks which look at NGOs' power agendas, participation approaches and relations with local groups in relation to their programmatic strategies. Such conceptual frameworks have contributed to the creation of a typology of "progressive" and "conventional" NGOs. This theoretical tool has been used to locate on the progressive end of the NGO spectrum those Canadian and Jamaican NGOs that function as the focus of this analysis and to examine the basis for their alliance.

Murchie (1993) questions Korten's (1987) assumption that there is an automatic increase in the level of politicization of NGOs as they move from the welfare generation to the others (1993: 6). Certain NGOs recognize that all their interventions are inherently political and that development programming cannot be thought of as a neutral process; power structures are either reinforced or

transformed by NGO interventions (Murchie 1993: 4). Murchie (1993) argues that a distinction needs to be made between NGOs' strategic programme approaches and their focus on power. He has developed an analytical model whereby the basis for differentiation among NGOs lies in the connection between NGOs' progressive or conventional "power agendas" and their programming strategies²⁹ (1993: 3-6). NGOs which follow the conventional agenda focus more on economic development than political empowerment, analyze obstacles to development in technical terms and work toward improving the "welfare of project or programme participants" (Murchie 1993: 4). NGOs which adopt the progressive power agenda are those which have an explicit agenda of political empowerment, analyze power structures when looking at constraints to development and work towards "emancipatory social change"³⁰ (Murchie 1993: 4). Murphy (1991) agrees that "[p]olitical maturity, clarity and depth of analysis and the quality of intervention provide the real distinguishing mark among the agencies" (1991: 177).

Macdonald (1992) has differentiated among mainstream and progressive NGOs in the Central American context on the basis of their approach to

²⁹Murchie (1993) differentiates four different strategies in his framework: welfare; local; systems; and solidarity (1993: 3).

³⁰ This model is useful in clarifying the essential differences between progressive and conventional NGOs, particularly in the Caribbean context. As Murchie (1993) states, "In the Caribbean, it seems there is a very clear distinction between NGOs that are politically active and those which tend to support the official development priorities" (1993: 6).

participation; influence of international actors; and nature of linkages between the NGO and local groups or social movements (1992: 4). Thus, mainstream NGOs are characterized by "instrumental participation" whereby local participation is a means to efficiently implementing a project but local participants do not control the design or evaluation of the project; "foreign agency paternalism" whereby international donors control most important decisions; and "limited local linkages" whereby local contacts are largely with state agencies, not autonomous social movements (Macdonald 1992: 4). Progressive NGOs, on the other hand, are characterized by: an "explicitly political strategy of empowerment" involving expanded community control at the local level and involvement in broader social movements for increased political participation in national decision-making processes; "relative autonomy of the local NGO"; and "links with social movements" to challenge the existing national distribution of power and resources (Macdonald 1992: 4). Murphy (1991) agrees that the nature of relations with local groups is key to distinguishing among NGOs. "The fundamental element that distinguishes agencies and their work is the nature and quality of the relationships formed in developing priorities and strategies" (Murphy 1991: 176-7).

Macdonald (1992) differentiates between progressive and mainstream NGOs by examining their approaches to participation at the local and national level. However, few attempts have been made to differentiate among progressive and conventional NGOs by examining their approaches to participation at the international, or in other words, the North-South NGO level. Although it is assumed that the

numerous differences among NGOs in "development philosophies, organizational structures and constituencies with whom they work...will have implications for the nature and process of partnership relationships that are established" (PAC 1989: 25), very little exploration of the links between types of Northern and Southern NGOs and their conceptualization and practice of partnership in general, and participation in particular, has been done in the literature or elsewhere.³¹ As Yates (1988) notes, "[A]rguably the different approaches...could (should?) result in different attitudes to the question of partnership, but the degree to which this is so in practice has not been systematically studied" (1988: 6).

Conclusion

By reviewing the changing discourse of development and participation and the focus by some aid regime members on the role of NGOs in facilitating community participation at the micro and macro levels, I clearly show that there is a myth of the homogenous NGO community. This myth needs to be deconstructed because it serves to mystify the fact that different NGOs have different analyses of and approaches to development, power, participation and relations with other NGOs. In this chapter, I outline various theoretical frameworks which contribute to demythologizing NGOs. These generational frameworks contribute to a clearer understanding of NGOs'

³¹ An exception is the 1994 Partnership Africa Canada study which explores "levels of partnership" and their interplay with strategic goals and goal indicators of NGOs (PAC 1994: 53-4). However, there is little study of the relationship between the level of partnership and different approaches to participation.

programming strategies, strategic orientations and philosophies toward development, although they are weak in incorporating the concept of gender. Conceptual frameworks which differentiate between progressive and conventional NGOs on the basis of their power agendas and programming strategies and their approaches to participation at the local level are particularly useful in this regard because they highlight NGOs' differential understanding of the political nature of development and participation.

However, what is necessary is a continuation of this work to differentiate among NGOs in a North-South NGO context. Frameworks are needed which would differentiate among progressive and conventional NGOs on the basis of their different conceptions and practices of partnership in the North-South NGO context and their different approaches to participation in this same context. Such frameworks would make explicit NGOs' different vision of the basis for their partnership and the mechanisms they have put in place to actualize this vision.

In the next chapter, I review the literature on North-South NGO partnership to highlight what is and what is not being said about this topic. I particularly examine the conventional and progressive discourses of NGO partnership and the conceptual framework of participation within these discourses.

Chapter 4 : The Problematic Discourse of Partnership

Introduction

This almost unavoidable decision to work together brings with it the challenge of building a productive and mutually satisfactory relationship between two groups of organizations which are highly unequal in terms of power, resources and institutional strength; come from diverse historical, cultural, political and intellectual environments; speak different languages; and are physically located thousands of miles apart, often in countries whose only historical links are those of domination and exploitation, dependence and colonisation (Malena 1995: 8).

In the study of North-South NGO relations, "partnership" has come to be a key area of academic and practitioner interest. However, there is a general lack of consensus surrounding its meaning and methods. In this chapter, I argue that two main conceptual frameworks of North-South NGO partnership exist in the literature. First, I analyze the conventional discourse of partnership, here called the "reformist" framework, to highlight the assumptions, strengths and weaknesses within this conceptualization. Second, I examine progressive alternatives to this conventional discourse of partnership, here called the "solidarity" framework. The assumptions of this framework will be highlighted with a view to illustrating its strengths, as well as its weaknesses. I conclude the chapter with a look at the conceptual framework of participation within the progressive and conventional discourses of partnership. I propose that what is needed is a theory of NGO partnership based on a solidarity framework which takes into account the internal and external (institutional and political-economic) constraints that limit

participation and the potential of practising solidarity relations between Northern and Southern NGOs.

4.1 Partnership: A Lack of Consensus

The usage of the term "partnership" in the discourse of development dates back approximately 30 years. It was initially used by Northern church groups in the 1960s to refer to relations with religious colleagues in the South (Malena 1995: 7). Partnership first appeared in the discourse of multilateral members of the aid regime in Partners in Development: A Report of the Commission on International Development (1968) (Hately 1995: 7). The Commission, sponsored by the World Bank and chaired by Lester B. Pearson, had a mandate to examine the results of the previous 20 years of post-Marshall plan development with an eye to recommending directions for future endeavours. The key recommendation was the "development of a new strategy based on the principle of a global partnership and on the cooperative relationship between the developed and developing countries" (Hately 1995: 8).

The concept has also been a guiding theme in the discourse of development of the aid regime's bilateral members. Partnership with NGOs, recipient governments and the private sector is one of the principles and priorities of Canada's official development assistance programme as outlined in the ODA Charter of CIDA's policy framework, Sharing Our Future (1987). "Partnership is the key to fostering and strengthening the links between Canada's people and

institutions and those of the Third World" ³²(CIDA 1987: 23). This commitment to the concept of partnership in the context of Canadian international development assistance was reiterated in documents which came out of Canada's recent foreign policy review (Special Joint Committee of the Senate and the House of Commons 1994). The report which reviewed Canadian foreign policy declared that Canada's aid programme, "should be designed to help people help themselves and must be undertaken as a true partnership based on local consensus" (Special Joint Committee of the Senate and the House of Commons 1994: 49). Most recently, at the U.N. Conference on Social Development in Copenhagen this March, American Vice-President Al Gore, unveiled a new American foreign aid focus. The "New Partnership Initiative" will shift the implementation of development projects overseas from the bilateral agency, USAID, to the private sector (CBC World News, March 17, 1995).

Partnership has also become a leitmotif in current debates concerning North-South NGO relations. Since the late 1970s, an increasing number of Northern NGOs have made links with Southern NGOs. Partnership among Northern and Southern NGOs has been seen as a way to increase NGOs' comparative advantage and buttress their weaknesses (MacLean 1993: 26). More recently, with the current focus on building civil society in the development process, it is argued that one of the most effective ways to strengthen civil

³²See Brodhead and Pratt (1994: 113) for a critique of the CIDA discourse of partnership, particularly in regard to its relations with NGOs.

societies in the South is to link like-minded Northern and Southern organizations in a movement towards the globalization of civil society (Macdonald 1994: 11-12).

The recent emphasis on networking, coalition-building, bridge-building and partnership-formation is the latest change in the evolution of the role of voluntary organizations in development. It combines the acknowledgement that Southern associations are better situated than Northern ones to realize NGOs' comparative advantage in community development with the realization that the attributes of smallness and grassroots locality which confer that comparative advantage limit the contribution that individual NGOs can make to the development of local, national and regional civil societies (MacLean 1993: 26).

The growth of North-South NGO linkages has been closely paralleled by reflection upon the concept of NGO partnership by practitioners and scholars of development both North and South. However, as one NGO theorist puts it, there is a "general ambiguity and lack of consensus as to what partnership actually means"³³ (Malena 1995: 3). The next sections will review the NGO literature and suggest that there are two broad perspectives on partnership which stem from distinctly different assumptions. I have broadly characterized these perspectives as the conventional discourse of partnership, since it focuses on the technical

³³ Malena (1995) does argue, however, that while one definition of partnership may be hard to pin down, there are a number of common principles held up by NGOs as "embodying the concept of partnership" (Malena 1995: 12). These are: jointly agreed purpose and values; mutual trust, respect and equality; transparency; reciprocal accountability; understanding each other's political, economic, cultural contexts and institutional constraints; and long-term commitment to work together (1995: 12-15). These principles of partnership are also outlined in Campbell (1988: 12); Gordon-Drabek (1987: x); MacLean (1993: 20); PAC (1989: 12; 1994: 11); and Yates (1988: 10).

aspects of partnership; and the progressive discourse of partnership, since it focuses on the political dimensions of partnership.

4.2 The Conventional Discourse of Partnership: A Reformist Framework

The ideology of partnership is pervasive, and since words and language are the purveyors of ideology, it is not just a matter of "semantics". The words we use are crucial. They define limits, and reinforce the quality of relations (Murphy 1993: 8-9).

I have denoted the conventional discourse of partnership more specifically as a "reformist framework" because one of its key assumptions is that "with a little effort and reform, organizations can create equal relationships" (Hately 1995: 15). However, this framework's focus on internal, institutional reform to equalize North-South NGO relations leads to two key problems. First, it leaves unacknowledged the underlying structural and power relations which shape relations between Northern and Southern NGOs and limit the possibility of achieving equitable relationships. Second, it gives very little attention to the divergent historical roots of Northern and Southern NGOs and the implications of these origins on conceptualizations of partnership. As Johnson (1993) notes, Northern NGOs often had charitable beginnings.

Northern NGOs were initially formed with the intent of helping others, in the spirit of charity and benevolence. Southern NGOs, by contrast, were formed as people recognized the need to help themselves. Although many NGOs in the North have moved past the charity and relief stage, it is still important to recognize these roots, and to understand the differences between those focused on other (the North) and those focused on self (the South) (1993: 9).

Northern NGOs' early interventions also reflected the "reformist ideas" behind modernization, trickle-down and basic needs theories that were prevalent at the time of their initial activities in the South (Christie 1991:5).

It is important to examine these roots because they structure the way partnership between Northern and Southern NGOs has been conceptualized. Northern NGOs' interventions were embedded in notions of charity and reform and the focus was on helping "others". This focus on "other" is central to the three assumptions embedded within the charity model which, I would argue, structures how the reformist framework for partnership has been conceptualized.

4.2.1 The Charity Model: Assumptions of Separation, Optionality and Superiority

The first assumption of the charity model³⁴ is that the giver's concerns are not related to those of the recipient; in other words, that the recipient is "other." As Heldke (1992) explains,

³⁴The charity model refers to the current institutionalized, bureaucratized model of charitable assistance which is structured on the geographical and rational structures of distance and externality and the premise that the "poor" will always exist. Reference to this model in the context of the conventional discourse of North-South NGO partnership is to be differentiated from a discussion of the original roots of charity which were based on notions of love and openness to others. As Murphy (1991) argues, "Real charity...is not based on profane or fatalist considerations, but rather on a profound ecological insight: an injury to one of us is an injury to all; exploitation of the least of us, diminishes us all; freedom and peace for 'the one' are only possible through freedom and peace for 'the other'" (1991: 194).

Charity...is predicated on a belief that I and my concerns are separate from you and your concerns. It describes my relations with you as external, objectified. Thinking of my 'aid' to you in terms of charity encourages me to disconnect and bracket off my worries from yours, to ignore the (often deep and obvious) connections between us (1992: 307).

This assumption of separation leads to a second assumption which is that all relations between persons are optional; charitable acts become those we need not have done "for they involve acting upon relations we needn't have established" (Heldke 1992: 307). This assumption of optionality precipitates the third assumption of superiority. The notion of charity, choosing to give aid, when one does not have to, in order to solve the external problems of another, constructs a hierarchical relationship. As Heldke (1992) states,

I, because I am 'granting' the aid, am in a superior, more powerful position. I can choose to set aside my own problems in order to aid you in solving yours. I have solutions; you have problems. You are comparatively powerless in the relation, and can offer me little in return for my aid (1992: 308).

These assumptions of separation, optionality and superiority inherent in the charity model are embedded in the reformist framework of North-South NGO partnership. As the previous chapter on the evolution and differentiation of NGOs illustrated, many NGOs have moved beyond the explicit charity stage in their activities. However, many of the charity assumptions are implicit in much of the conventional discourse of partnership. This leads to problematic commonalities in the way partnership continues to be conceptualized. The four traits particularly prevalent in writing by certain Northern academics and practitioners are: partnership is defined by the exchange of resources from North

to South; partnership is geared towards the improvement, within Southern NGOs, of such quantitative and operational factors as economic efficiency, accountability and professionalism; partnership is based on an optimal division of labour; and partnership is project-centred.³⁵ These elements reveal a conceptual framework which is grounded in assumptions of partnership as a hierarchical, conditional and contractual relationship.

4.2.2 Partnership as a Hierarchical, Conditional and Contractual Relationship

First, the reformist framework of partnership has been constructed upon the assumption that the act of exchanging financial resources from Northern to Southern NGOs is the sole relation of importance linking the two groups. The focus by Northern authors on accountability to funders, proper management of funds and corruption and misuse of funds by Southern NGOs (ie Elliot 1987: 60; Pratt 1988: 23-4; Smith 1987: 90) underlines the centrality of the financial exchange aspect of the relationship. As Kajese (1987) states, "International NGOs...rely on aid money and technical competency as the basis of their relationships with the indigenous NGOs" (1987: 81). In addition, there is a tendency in the literature to equate "who we support" financially with "partner"

³⁵ This analysis focuses on the scholarly literature on NGOs which, admittedly, often lags behind changes occurring in the current context. Some of these elements of the partnership discourse are changing, particularly in the Canadian context. For example, CIDA is encouraging Canadian NGOs to develop partnerships based not on funding, but on the goal of fostering "the development of civil society in developing countries by supporting initiatives of developing country voluntary organizations and building their capacity" (CIDA 1994b: 5).

(ie. Pratt 1988: 24). While in the North, the tradition of referring to Southern NGOs as "recipients" and Northern NGOs as "donors" is being replaced by the outwardly equalizing term of partner, it is interesting to note that partnership terminology does not have as common a usage in the South, where the terms "donor" and "internationals" are more prevalent (Yates 1988: 10). This refusal to adopt the outwardly neutral partnership tag signals a rejection by Southern NGOs of the implicitly hierarchical conceptualization of partnership that comes from defining the relationship solely in financial terms. As Kajese (1987) states,

Judging by the fact that the basic relationship between international NGOs and indigenous NGOs is conditioned by the former's wealth and status as "donor," and the latter's financial poverty and status as "recipient," I strongly suspect that, for the international NGOs, the nature of the partnership is, at its most benevolent, that of "junior/senior" partner or at its most malevolent, that of "horse and rider" (1987:80).

Critics argue that partnership has come to describe relationships that are nothing more than banking transactions³⁶ (Christie 1991: 10). This conceptualization of partnership renders invisible the underlying relations linking the two groups -- historical North-South relations of domination, exploitation,

³⁶Ford-Smith (1989) also speaks of the power that the financial exchange exacts over the lives of people in Southern organizations. "They are able to shape the lives of the organizations they support, not simply because they fund them, but also because of the processes and the disciplines they require the organizations to become involved in" (1989: 100). These processes include particular styles of project proposals and funding reports required for each funder.

dependence and colonisation and current macroeconomic policies of structural adjustment and globalization. As Ziswa (1988) points out, "How can Northern NGOs talk with any real meaning of "our funds" and "our projects" when in the greater economic context, the "so-called donors, the North, receives more from the so-called recipients, the South, in terms of debt service payments and deteriorating terms of trade, than it 'donates' in terms of aid?" (1988: 29). It also conceals the contributions that Southern NGOs make to the relationship. As Kajese (1987) asks, "Do our northern counterparts see us as in any way reciprocating their 'generous' donations of money and know-how? What do they take back in their purses after they have 'emptied' them in the South?" (1987: 80).

Second, the concept of partnership conceals implicit power relations which reveal themselves in the reformist framework which calls for increased Southern efficiency, professionalism, accountability, responsibility and self-sufficiency *in exchange* for continued funds from Northern NGOs. The central position given to the funding aspect of the relationship has created a discursive framework outlining certain conditionalities and expectations for quantifiable results from Southern partners. The assumptions that characterize the charity model, superiority and optionality, are clear. The message is that if these conditions and expectations are not met, Northern NGOs will choose to end the relationship. In addition, there is no accompanying acknowledgement of the conditions and expectations of Southern NGOs for Northern partners. As French (1991) asks, "How can you really be a partner on equal terms with everyone else if in some

respect you feel there is nothing about your situation that needs to be assessed and addressed by all of us?" (1991: 8).

Pratt (1988), giving the "donor perspective" at an International Council for Social Welfare (ISCW) seminar, argues that many Southern NGOs often represent their own interests and not those of their supposed constituents. He suggests that, in these tight economic times, Northern NGOs need to be more critical in who they support (1988: 24). He states, "[t]he present argument from the South often looks like a plea for power without responsibility, power in terms of *unconditional* funding from the North...*without responsibility* either to the donors or to the real partners in development, the poor. It is unfortunate that the term 'partnership' has often been used to avoid responsibility by both the North and South" (1988: 23; emphasis added). He argues that Northern NGOs need to be more responsible in questioning messages coming from the South and that Southern NGOs need to address the day to day problems of their constituents instead of focusing so much on their relations with donors (Pratt 1988: 23).

Smith (1987), in giving the "Northern perspective" on the optimal division of labour for Northern and Southern NGOs, states, "*In exchange for greater delegation of authority to indigenous NGOs in the South, international NGOs will want to see progress in evaluation and accounting procedures... International NGOs will also expect indigenous NGOs to pursue more aggressive efforts to generate local funds in their own countries*" (1987: 91; emphasis added). In

addition, Elliot (1987) argues that international NGOs in partnership with Southern NGOs should focus on "technocratic change" when assisting Southern NGOs in developing the capacity to become effective agents of change. This technocratic change includes improvement in human resources; technology (management and communications systems); and institutional relationships (1987: 61). Kajese (1987) succinctly sums up the notion of a "politics of language" and unveils precisely what the reformist framework of partnership conceals, "[t]he language of 'concern for effectiveness,' 'accountability,' 'efficiency,' 'professionalism,' etc. masks the real language that in fact says, 'We have the money, the know-how and therefore the power'" (1987: 80).

Third, the assumption of separation inherent in the charity model manifests itself in the reformist framework for partnership through the focus on the "optimal division of labour" between Northern and Southern NGOs. "Partnership...implies a pooling of resources, a sharing of experiences and an effective division of labour" (Campbell 1989: 9). Even when there is an attempt to broadly define partnership by emphasizing a balancing of power through participatory mechanisms, the language of division and assumption of separation is still apparent. For example, a Partnership Africa Canada (PAC) (1989) study on NGO partnership defines the concept in the following way.

Partnership seeks a more equitable relationship in which power is shared between the two partners through a joint process of decision making from beginning to end, and a division of labour where each partner contributes according to their resources. Partnership implies exchange, interaction and sharing. Both partners give and both receive (1989: 25).

This notion of partnership as a limited, discrete entity between two distinct parties is reinforced by Fowler (1992) who argues that North-South NGO partnerships in the 1990s should be more "specific, nuanced and pragmatic" since "partnership is not a blanket covering all aspects of a relationship" but is "frequently time, issue and people bound" (1992: 22). Fowler's discussion also reflects the common conception of partnership as a negotiable entity. He states that when initiating a partnership, NGOs should "define precisely (a) what they want a partnership for and (b) what organizational adaptation is possible, and on offer, and what is not negotiable" (Fowler 1992: 22). Yates (1988) also defines the concept in legalistic, contractual terms as "an equitable contract of cooperation between two (or more) parties seeking jointly agreed goals" (Yates 1988: 10). As Murphy (1993) suggests, this discourse constructs partnership as a relationship to be broken down into specific parts:

Partnership implies a division: a division of labour, of reward, of responsibility, of authority, of ownership. Partnership is a limited, negotiated relationship for mutually supportive, but separate, action toward limited but (at least on the surface) mutually supportive goals (Murphy 1993: 9).

Fourth, much of the discourse is framed around the notion of North-South NGO partnership as the best means of carrying out a particular project in the Southern context, as if no deeper connections exist between Northern and Southern NGOs. This is evident in two PAC studies. The 1989 study concluded that many NGOs view partnership as "project inspired" (PAC 1989: 15); the 1994 study reveals that this trend persists, in that there exists among NGOs "a blurred

distinction between 'Partnership' as a process and 'Partner' in a project"³⁷ (PAC 1994: 15).

4.2.3 The Reformist Framework: Strengths and Weaknesses

The reformist framework of partnership has both strengths and weaknesses. By focusing on internal reform, the framework highlights operational constraints in the North-South NGO relationship and offers practical solutions to address them. This may be considered a strength. For example, PAC (1989) identifies the major constraints to North-South NGO partnership as limited resources and staff; lack of partner involvement in decision-making processes; lack of clarity in the definition of each partner's role and responsibilities; and limited ability to finance the human resource development of Southern partners (1989: 15). Malena (1995) identifies not only operational, but more political constraints to partnership: failure to address aspect of power in NGO relations; lack of ideological evolution (NGOs accept the language of partnership without actualizing the ideological principles which give it its meaning); lack of trust (Northern NGOs fear corruption and mismanagement and Southern NGOs fear being used for other ends); external pressures from governments and constituencies; organizational constraints to implementing the new division of labour among Northern and Southern NGOs (1995: 21-24).

³⁷These perceptions of partnership could be inspired by the scale, whether it be local, national, regional, or international, at which these NGOs work.

Constraints conceived of in such a way lead to such recommendations for improvement as the development of a partnership code, with rules of conduct to guide partners in their roles, responsibilities and obligations (Yates 1988: 14), or the development of a "partnership matrix" with several indicators against which to measure one's own partnership performance (PAC 1994:44-51). Malena's (1995) recommendations include: building the organizational capacity, reducing the financial dependence and improving the negotiating capacity of Southern NGOs; building trust between both agencies; and strengthening constituency links (1995: 24-28).

These suggestions are useful tools as evidenced by the fact that many NGOs have developed policy guidelines on partnership, outlining the obligations and expectations of themselves and their partners (PAC 1994: Appendix A). However these recommendations are problematic because they focus almost exclusively on reform of Southern NGOs and they do not address the root causes of constraints in partnerships.

These root causes of partnership constraints are political, ideological and structural.³⁸ The lack of attention to these constraints underlines the weakness in the reformist framework of partnership. With the exception of a few authors, the issue of power, and the transfer of it from Northern to Southern NGOs, is conspicuously absent from much of the conventional discourse of partnership.

³⁸French (1991) talks of Northern NGOs as being "structurally advantaged" and of Southern NGOs as being "structurally disadvantaged" (1991: 3).

Partnership constraints are rooted in the power differential between Northern and Southern NGOs (Brodhead 1987: 5; Elliot 1987: 65; Malena 1995: 2). This power differential not only stems from Northern and Southern NGOs' unequal access to resources, it is embedded in Northern NGOs' conceptualization of partnership and their definition of themselves as indispensable and superior partners. The mechanisms and tools suggested by various authors to facilitate better partnership and negotiate away operational constraints are not adequately addressing this central issue. As Malena (1995) argues,

Despite the unavoidable fact that issues of power lie at the heart of the partnership debate, the entire conceptual vocabulary which has been constructed around the notion of partnership would seem designed to deny its existence....much of what has been said and written about partnership has been ineffectual because of its failure to address this crucial aspect of the partnership concept. Partnership primarily and unavoidably implies a transfer of power from N NGOs to S NGOs³⁹ (Malena 1995: 21-2).

4.3 The Progressive Discourse of Partnership: A Solidarity Framework

Partnership is a dichotomy, and implies an objectification of relationships. Solidarity, on the other hand, is unity, and implies an integration of relationships (Murphy 1993: 8-9).

The conventional partnership discourse, grounded in assumptions of charity and framed around the notion of internal reform to create equal relationships among Northern and Southern NGOs, is problematic. While its strength lies in identifying and proposing practical solutions to operational

³⁹ Malena's (1995) article is a good attempt at bridging the conventional and progressive discourse of partnership because it takes into account both operational and political dimensions of partnership.

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constraints in relationships, its assumptions limit its vision of mutuality in the relationship and its analysis of underlying power relations. These limitations have been recognized by certain authors whose rethinking and redefining of NGO relations, and explicit discussion of the political dimension of these relations, inform what I have broadly characterized as the progressive discourse of partnership. They have put forth alternative conceptual frameworks grounded in assumptions of co-responsibility and framed around the notion of solidarity⁴⁰ and external structural change. I have denoted this body of literature as the "solidarity framework" of partnership.

4.3.1 The Notion of Co-Responsibility: Assumptions of Integration, Obligation and Parity

Historically, the solidarity framework may be seen as growing out of two interconnected situations. One is the growth in the 1960s-70s of the "structural analysis of underdevelopment" by Southern theorists and the internalization of this analysis in progressive NGOs (Christie 1991: 5). During the same period, Northern volunteers in the South were being challenged by local organizations affiliated with nationalist movements of the time to rethink their development

⁴⁰ It is interesting to note that solidarity, referred to as a "sense of solidarity", is often subsumed within the conventional partnership discourse as a partnership principle. I would argue that the political meaning of solidarity becomes neutralized in this context.

strategies (Baker 1993: 346). They returned home to critique the traditional notions and practices of aid relationships (Herbert-Copley 1987: 24).

It may be argued that this critical awareness and changing analysis of development are grounded in the notion of co-responsibility. Co-responsibility "is meant to evoke...the fact that acting in the world is a communal, relational activity -- that we are in correspondence with, and are also responsive and responsible to, others in the world" (Heldke 1992: 310). This concept implies relations based on integration not separation (ie, my interests are deeply connected to yours): on obligation, not optionality (ie. I am deeply connected to your life in many ways. so it is not a question of choosing to initiate relations with you); on parity, not superiority.

Thinking about relations in terms of co-responsibility has deep implications. It opens up the possibility of reconceptualizing relations between Northern and Southern NGOs. It signifies the redefinition of partnership from an hierarchical, conditional and contractual relationship to partnership as an equitable, mutualistic and process-oriented relationship. Partnership is not defined by the sole act of financial exchange but by all the links connecting the organizations. It is not defined as a means to carry out Southern projects, but as an *integral* part of a broader development vision in both Northern and Southern contexts. It is not defined as a finite, contractual relationship, but one that is based on long-term *process*.

This reconceptualization of North-South NGO partnership is evident in the work of a number of NGO theorists and practitioners (Christie 1991:9; Kajese 1987: 84; Murphy 1991: 203-5; 1993: 9). Christie's (1991) definition of solidarity relationships typifies the attempt to reconceptualize relations between Northern and Southern NGOs based on assumptions of integration, obligation and parity.

[They] would be based on a shared structural... analysis of poverty, and would lead to a common strategy for transforming the structures which perpetuate it nationally and internationally. There would be reciprocity, and interdependence in the relationship, as one group's actions enhanced or strengthened the actions of the other (Christie 1991: 9).

Murphy (1991) argues that reconceptualizing relations in this way is necessarily transformative in practice. It implies "a more active vision of the quality of participation," "a public manifestation of this active vision" and the "shedding of neutrality" (1991: 203-4). It also challenges Northern NGOs in terms of their programme focus, linkages, lobbying and advocacy, internal structures, relations with the state and fundraising (Murphy 1993: 9-11).

4.3.2 Partnership as an Equitable, Mutualistic and Process-Oriented Relationship

The solidarity framework conceptualizes issues of poverty, exploitation and injustice, traditionally identified as existing "over there" in the South, as *relations* of poverty, exploitation and injustice which are connected in the North and South by the international economic system. As French (1991) notes, "One of the values of recognising the South in the North is that it undermines the concept of

Northern superiority, and creates new possibilities for working together as equal partners confronting a common problem" (French 1991: 3). Taking this particular ideological position on how the world works has deep implications for conceptualizing the appropriate locus of action, particularly for Northern NGOs. "Solidarity does not mean there or here, them or us, Third World or Canada. Solidarity means working together for change together, here and there. It means common cause" (Murphy 1993: 7). To be truly working in solidarity means to be working as a "social agent for change" in one's own context on social justice issues relating to aboriginal rights, militarism, social and welfare reform, for example, and uniting with groups, both nationally and internationally, that are doing the same (Murphy 1993: 7; Seabrooke 1993: 5).

In particular, the solidarity framework implies action at the policy level. Some argue that Northern and Southern NGOs cannot talk of being "partners" if challenging policies that perpetuate injustice and inequality is not central to their agenda. They argue that the policies of economic restructuring and trade liberalization put forth by the international financial institutions and Northern and Southern governments unite Northern and Southern NGOs as never before (French 1991: 15). Thus, the solidarity framework of partnership is envisioned as operating at the programming and policy levels, not solely at the project level as conceptualized in the reformist framework of partnership.⁴¹

⁴¹In programmatic terms, Korten (1990) and Murchie (1993) refer to this as building "solidarity networks" (1990: 127; 1993: 3).

However, Southern activists argue that it is not enough to recognize the South in the North and work together on programmes and policies to address common problems. Solidarity involves redefining what is valued in the North-South NGO relationship. French (1991) argues that creating solidarity relations

can only happen if we look beyond the fact that we are lying in the same bed; if we examine how our positions on the bed in relation to each other have been defined for us, and by whom; if we analyse the impact on us of being defined into those positions; and if we then seek to redefine the positions to seek a more creative and fulfilling relationship based on recognition of equality and not on assumptions of superiority or dominance" (1991: 3).

The solidarity framework thus embodies the notion that, in the pursuit of action to address common problems, both Northern and Southern partners bring important, equally valued, qualities to the relationship. As Kajese (1987) states, Southern NGOs need also to be regarded as "donors." "We do not have to exchange identical gifts, pound for pound, but we do have to exchange gifts, and sincerely accept those gifts" (1987: 80). Kajese further notes that one particular competency that Southern NGOs have, that should be shared with the North, is their "practical, relevant and valuable development experience" (1987: 82). Another competency to share would be their experience with SAPs, an issue that is recently affecting the North more directly.

Proponents of the solidarity framework also argue for a redefinition of partnership that acknowledges that the relationship strengthens both partners. This implies a redefinition of power in the relationship. Instead of the notion of power-over that is inherent in the donor-beneficiary dyad privileged in the

conventional discourse of partnership, this redefinition of partnership implies power-with whereby the whole is greater than the sum of its parts (CCIC 1991: 19). This notion of power-with is especially important in the context of addressing common problems. "We [...] have to move away from the concept of 'beneficiaries' and 'donors'. We [...] have to recognise that in the partnership all partners have much to learn from each other, and that we are in this thing together working towards a common goal of empowering each other to find common solutions" (French 1991: 4).

While trying to redefine the notion of power, the solidarity framework also explicitly acknowledges differential power in relations. It accepts the fact that relations are often not symmetrical because they exist in a particular context. Southern advocates, particularly, argue that differential power, as mediated by funding and unequal access to resources, shapes relations between Northern and Southern NGOs. Therefore, the solidarity framework advocates openness in discussing power issues in the spirit of understanding, addressing and resolving them.

This leads to the centrality of "process" as a relationship methodology within the solidarity framework. Solidarity relations are not conceptualized as discrete, time-bound, negotiable linkages which exist in a vacuum, but as long-term, process-oriented relationships which exist in a particular political-economic and institutional context. As French (1991) states, thinking about relations in terms of solidarity means dealing with power issues as they arise, critically

analyzing current modes of relating and understanding the context in which they are embedded: doing this opens the door to creating new modes of, and possibilities for, relating.

The question is not whether we have problems between us or whether there is differential power but where we position ourselves in trying to solve them: whether we see ourselves as superior deliverers or as equal partners trying to create new possibilities together from our several needs⁴² (1991: 9).

4.3.3 The Solidarity Framework: Strengths and Weaknesses

The solidarity framework of partnership also has certain strengths and weaknesses which require discussion. The primary strength of the solidarity framework of partnership lies in its attempt to envision new ways of relating between Northern and Southern NGOs. Other strengths are the explicit acknowledgement of the power dimensions in North-South NGO partnerships and the attempt to ground notions of the mutuality of the relationship in an analysis of structural connections between the North and South. It also recognizes that North-South NGO relations do not exist in a vacuum, but in a particular institutional and political-economic context.

Its weakness lies in the fact that its advocates do not address the practical/operational constraints which limit the potential of engaging in solidarity relationships even when the ideological and philosophical commitment is present.

⁴²The challenges of which French (1991) speaks are also those faced between NGOs in the Southern context. See ADA (1994d: 7) for a discussion of the process of resolving tensions between grassroots and umbrella Jamaican NGOs.

Further, there is no real systematic discussion of what mechanisms are necessary to put solidarity relations into practice. Finally, there is a lack of attention to specifically addressing the concept of participation within solidarity relations.

4.4 Partnership and Participation

Participation is considered a crucial component of establishing equality in partnerships (PAC 1994: 29; Ziswa 1988: 37) and key to a transfer of power between Northern and Southern NGOs (Brodhead and Pratt 1994: 107; McAfee 1991: 222). Yet, in general, there is a lack of analytical attention to the specificities of participation in the practice of partnership between Northern and Southern NGOs within both the solidarity and reformist frameworks of partnership.

In particular, theorists who promote a solidarity framework of partnership do not adequately define participation or address mechanisms of implementation within the context of North-South NGO relations. They lack a systematic analysis of the relationship between working together in solidarity and participation. "A more active vision of the quality of participation" (Murphy 1991: 203) is advocated without defining its dimensions, discussing its implementation or addressing its constraints.

When participation is specifically defined, it is defined as "effective" participation in "decision-making processes, policies and strategies" (Kajese 1987: 81-2; Ziswa 1988: 37). McAfee (1991) argues that, in order to achieve a transfer

of power from North to South, "[p]erhaps most important is the establishment of mechanisms for the direct participation of Southern NGO representatives in program planning and evaluation" (1991: 222).

However, even when participation is specifically defined and examined in North-South NGO relations, there is little evidence that it is being actualized to any great degree.⁴³ In her research, Malena (1995) found that consultation and decision-making between Northern and Southern NGOs occurs at three levels: in the overall development agenda; in the selection of projects and programmes; and administrative and logistical issues. Finding that Northern concerns tended to dominate at all levels, Malena concludes that there was a "lack of democracy and participation in N-S NGDO relations" (1995: 16). Brodhead and Pratt (1994b), observing the general absence of shared decision-making structures within Canadian NGOs, state that "the hesitancy of these measures may suggest reluctance to share power"⁴⁴ (1994b: 108).

Thus, these gaps in the literature regarding the relationship between the practice of participation and solidarity relations require further investigation. In

⁴³A notable exception is the Katalysis Foundation (1993) which describes its participatory approach as being based in many levels: governance through an exchange of board seats; strategic planning across agencies; training and technical support provided North-to South, South-to North and South-to-South; joint fundraising; cross-consulting on hiring; joint investigation and selection of new members; and cross-evaluation of organizations and programmes (Jones 1993: 6).

⁴⁴Interestingly, Brodhead and Pratt (1994b: 108) also note that "solidarist considerations," such as the fact that these shared decision-making bodies often do not represent the poor, are used to justify not establishing them in the first place.

particular the dimensions of, constraints to, and mechanisms for participation in solidarity relations between Northern and Southern NGOs need to be addressed.

Conclusion

In this chapter, I outline the two main conceptual frameworks of North-South NGO partnership. I argue that the reformist framework, which is underpinned by the assumptions of superiority, optionality and separation inherent in the charity model, conceptualizes North-South NGO partnership as an hierarchical, conditional and contractual relationship. Its weakness lies in focusing on the technical and operational components of North-South relations and not addressing underlying issues of power. Its strength lies in the fact that operational constraints to partnership are acknowledged and recommendations to address them are put forth.

By contrast, I argue that the solidarity framework, which is grounded in the assumptions of parity, obligation and integration inherent in the notion of co-responsibility, conceptualizes North-South NGO partnership as an equitable, mutualistic and process-oriented relationship. Its strength lies in explicitly addressing the power relations at play in North-South relations and redefining the ways that NGOs traditionally have related to one another. Its weakness is that the ways in which solidarity relations can be actualized and the constraints to this process are not thoroughly discussed.

Furthermore, I argue that the conceptual framework of participation at the North-South NGO level is not adequate in either of these frameworks of partnership. In the end, I would conclude that what is needed is a theory of NGO partnership which takes into account both the institutional and political-economic context in which partnership is practised (as advocated by the solidarity framework), as well as the practical constraints (as addressed by the reformist framework) which limit participation and the potential of engaging in North-South NGO solidarity relations. I hope that the findings of the case study will contribute to this growing body of theory.⁴⁵

This theoretical discussion leaves me with many questions which I will attempt to address in an examination of the conceptualization and practice of partnership between progressive Canadian and Jamaican NGOs within the context of changing Canadian-Caribbean relations. Can it be assumed that progressive Northern and Southern NGOs engage in relations of solidarity? Can it be assumed that progressive Northern and Southern NGOs engage in participatory relations? Can it be assumed that lack of participation is purely a question of not wanting to share power, particularly in the context of relations between progressive NGOs which explicitly address power issues in their external programming and which advocate a solidarity framework of partnership? What constraints, both internal and external, exist which limit the capacity of

⁴⁵ I would include the work of Hately (1995) and Malena (1995) in this body of theory.

progressive NGOs that conceptualize a solidarity framework of partnership from engaging in participatory relations? What are the constraints to participation, at the level of priority-setting and decision-making, in the practice of partnership between progressive North-South NGOs? What would be the approach to and mechanisms for participation necessary to carry out relations of solidarity?

Chapter 5: Canada and the Caribbean: The Erosion of a Special Relationship

Introduction

Canada and the Caribbean region, particularly the Commonwealth Caribbean,⁴⁶ have traditionally enjoyed a "special relationship." The uniqueness of this relationship has been based on such "intangibles" as "common languages, similar institutional structures and affection for the Commonwealth in its democratic traditions" (Guy 1990: 269). More tangible aspects of the special relationship have been rooted in preferential trading agreements, financial and commercial investment and the movement of people.⁴⁷ The closeness of the relationship and the historic importance of the Caribbean to Canada has had particular implications for Canadian development assistance to the region. On a per capita basis, the Commonwealth Caribbean has been the largest recipient of Canadian official development assistance (ODA) (Campbell 1992: 2).

⁴⁶ The Commonwealth Caribbean refers to the group of English-speaking islands, plus Belize and Guyana, which were formerly or remain under British colonial rule. The independent countries and dependent territories of the Commonwealth Caribbean are: Anguilla, Antigua, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St Kitts, St Lucia, St Vincent, Trinidad and Tobago and the Turks and Caicos (Paragg 1988: 263). For the purposes of this thesis, references to Canadian-Caribbean relations indicate the Commonwealth Caribbean. While I recognize that there are strong links between Quebec, Haiti and other French-speaking departments of the Caribbean, these links will not be discussed here.

⁴⁷ Tourism sent 604 000 Canadians to Bermuda and the Caribbean in 1993 (Statistics Canada 1994: 34) and it is estimated that between 400 000 to 500 000 people of Commonwealth Caribbean descent have migrated to Canada (Campbell 1992: 3).

However, trends of trade liberalization and increased competition in the current global context are contributing to a restructuring of the nature of this relationship. In this chapter, I argue that these trends, and more specifically, the Canadian government's response to them, have eroded the preferential status that has characterized the Caribbean's place in Canadian foreign policy. I argue that it is within the context of this response to global trends that Canadian development assistance in the Caribbean region is being restructured. It is important to understand this broader context because it very much shapes progressive Canadian NGOs programming priorities and strategies, and by extension, their practice of partnership with progressive Jamaican NGOs.

To illustrate this, I review the Canadian government response as outlined in Canadian foreign policy documents, notably the Report of the Special Joint Committee of the Senate and the House of Commons Reviewing Canadian Foreign Policy (1994) and Canada in the World (1995). These documents are the result of a parliamentary and public process of review of Canadian foreign policy.⁴⁸ I examine them with a view to highlighting their emphasis on fostering Canadian economic prosperity through the principle of trade reciprocity and clarifying CIDA's mandate through the focus on poverty reduction. The discourse of these documents reinforces directions Canada has already been following vis-a-vis the Caribbean region and, further entrench the marginalization of the region

⁴⁸See Brodhead and Pratt (1994a: 7-8) for an analysis of the impetus for and process of the foreign policy review.

in Canadian foreign policy-making. It is within the context of these foreign policy trends that the changing nature of CIDA policy and programming (CIDA 1993a: 1993b) and the redefinition of progressive Canadian-Jamaican NGO relations may be understood.

5.1 Canadian-Caribbean Relations: From Concessionality to Reciprocity

The kind of protection the region still had is getting destroyed in the sense of having a privileged relationship with Canada, where the government of Canada still saw the Caribbean as a valid recipient of aid and an important area for Canada in terms of history. We have NAFTA now which has really changed Canada's focus as a government....It's heavily focused on the trade relationships in South America. We know that Mexico, NAFTA, Chile are the important relationships for Canada now, in this period⁴⁹ (Rosene, interview, 1995).

Campbell (1992) argues that Canadian foreign policy⁵⁰ has been shaped by five factors: commitment to human rights, democracy and pluralism; multilateralism; support for NATO principles and programmes; relations with the United States; and international trade (1992: 7). Thus, the democratic nature of, and respect for, human rights in the majority of Caribbean nations, the region's geopolitical importance in the time of the Cold War and Canadian-Caribbean

⁴⁹Quotations from interviews have been edited for clarity, but their meaning has not been altered.

⁵⁰ See Mahler (1993) for a discussion of the four distinct eras of Canadian foreign policy-making since WWII (1993: 71).

trade links have traditionally made the region relevant in Canadian foreign policy-making⁵¹ (Campbell 1992: 7).

However, in recent years, many of these factors have lost their relevance. The end of the Cold War, the opening up of Cuba and the perceived end of the "Communist threat" in the region has seen the decline in geo-strategic importance of the Caribbean Basin.⁵² For the U.S., the end of the Cold War has meant a reduced security role in the Caribbean and the diversion of aid to Eastern Europe (Bernal 1994: 241). For Canada, it has meant not so much a reduction of a security role in the region as a linking of aid-trade opportunities towards Eastern Europe (Canadian Council of Churches 1993: 8). Diversion of funds to Eastern Europe could have a particular impact on CIDA's Caribbean programme (CIDA 1993a: 26).

⁵¹ There is a significant body of literature which explores the historic trade, as well as investment, financial, migration and development linkages between Canada and the Commonwealth Caribbean. See Campbell (1992); Guy (1990); Momsen (1992); and Paragg (1988) for extensive discussions of the specifics of the special relationship between Canada and the Caribbean. An oft-cited recent example is that in March 1990, the Canadian government forgave all outstanding development assistance debt (\$182 million) owed to Canada by the Commonwealth Caribbean (Campbell 1992: 7; Momsen 1992: 510).

⁵² The Caribbean Basin was an American-defined geopolitical concept which "unit[ed] the countries of Central America, the neighbouring states of South America and the archipelagic flow of islands from Florida to Venezuela" "as a region vulnerable to the ideological incursions of the Soviet Union, Cuba and Nicaragua under Sandinista rule" (Guy 1990: 264). In order to protect its defense and development interests in the region, the American government undertook the "Caribbean Basin Initiative" in 1984 (Momsen 1992: 506). During this period, Canada's policy in the Caribbean was closely linked to that of the American administration (Momsen 1992: 506).

In addition, despite the diversification of Canadian trade with the Caribbean and the signing of the CARIBCAN agreement in 1986, bilateral trade has not increased significantly. The CARIBCAN trade agreement extended one-way preferential access of most Caribbean exports⁵³ to the Canadian market (Weston 1994: 2). CARIBCAN's primary objectives were to

enhance the Commonwealth Caribbean's existing trade and export earnings, improve the trade and economic development prospects of the region; promote new investment opportunities; and encourage enhanced economic integration and cooperation within the region (Momsen 1992: 506).

However, Weston (1994) notes that in 1993, Canadian trade with the Caribbean totalled 0.20% of Canada's total trade and that "this share has barely changed from when Caribcan [sic] came into effect in 1986" (1994: 4). Despite its goal of enhancing trade and business opportunities, "the volume of Caribbean goods entering Canada which are affected by the CARIBCAN programme is minimal" and ultimately, "[t]here is little evidence that CARIBCAN has fostered direct investment of other forms of business links"⁵⁴ (Momsen 1992: 510).

⁵³ The CARIBCAN agreement initially excluded textiles, clothing, footwear, leather goods and methanol, among other key non-traditional Caribbean exports. In response to Caribbean criticism, in 1990 Canada widened the preferential access to include Caribbean leather luggage and vegetable-fibre products such that 98% of Caribbean exports enter the Canadian market duty-free (Momsen 1992: 508; Weston 1994: 2). This is slightly up from the 93% of Caribbean products which were already duty-free under Canada's General Preferential Tariff extended to all developing countries (Weston 1994: 4).

⁵⁴ Much of the reason for the Caribbean region's stagnating export earnings and diminishing trade balances, has been attributed to a combination of low prices for commodities exported and ballooning debt service payments to the international financial institutions (Weston 1994: 1).

Within this context of low economic potential in the Caribbean and the large potential of booming economies in other regions, the Caribbean's historic trading partners, the U.S., England and Canada have recently begun to "redesign their preferential trade hierarchies, which traditionally placed Caribbean countries near the top" (Weston 1994: 2). The North American Free Trade Agreement (NAFTA) and the anticipated bilateral trade agreements with Chile and other Latin American countries are the main tools engineering the realignment of Canada's trade hierarchies away from the Caribbean. Observers argue that "[t]he demarcation of the world economy into discrete, massive trading blocs appears to ensure a future for the Caribbean on the margins of the world economy" (Oxfam 1993: 1).

In particular, Weston (1994) points out, "[i]t is generally recognized that the value of Caribbean [sic] will be eroded by the NAFTA," the major concern for the Caribbean being "the possibility of trade and investment diversion" (1994: 5). Analysts argue that NAFTA would increase Mexico's relative advantage over the Caribbean by allowing Mexico to export duty-free the same products as the Caribbean now exports under preferential trade agreements (CBI and CARIBCAN); giving permanent duty-free access to Mexico; and extending phased-in duty reductions for products which are dutiable under the Caribbean preferential trading agreements (notably apparel and footwear), thus providing

"Mexico with an added advantage in the attraction of investment" ⁵⁵ (Lewis 1991: 105. See also Bernal 1994: 217; Campbell 1992: 7).

In addition, what is perhaps most important in this discussion are not the specificities of the NAFTA agreement which are shifting Canadian trade relations away from the Caribbean, but the shift in ideology that envisioned the Caribbean as a region to be accorded preferential status based on certain "intangible" links with Canada. The historic links of common traditions, political institutions, language, culture and people, upon which a large part of the Canadian-Commonwealth Caribbean relationship has been based, are less valued than the neoliberal ideals⁵⁶ which currently dominate the corporate and government agenda at the global and national level. Currently, the dominant model of development places value on increasingly open market economies, heightened productivity, competitiveness, consumerism and comparative advantage, free trade and movement of capital and advocates the pursuit of relationships which will realize these goals.

In essence, within this ideological/discursive context of neoliberalism, the principle of concessionality is being replaced by the principle of reciprocity. As

⁵⁵ As Weston (1994) notes, this investment shift may already be happening as some U.S. investors have already suspended plans to invest in the Jamaican clothing industry and are instead investing in Mexican production. In the first quarter of 1994, Mexican clothing exports to the U.S. market grew to 39% from 19% in 1993, while exports from the CBI countries dropped from 28% to 10% for the same period (1994: 3).

⁵⁶ Cameron (1993) identifies neoliberal concerns as "competitiveness, productivity enhancement and deficit reduction" (1993: 3).

Weston (1994) notes, this ideological shift is manifesting itself in Canadian policy vis-a-vis the Caribbean region.

The Canadian government appears to have adopted a hard-line approach - insisting on full reciprocity, ie. countries accepting the full NAFTA obligations before they can enjoy the privileges...the prevailing view is that the onus lies on the Caribbean countries to prepare themselves for acceding to the NAFTA by liberalizing their own economies. There is no suggestion that the Caribbean should be given special treatment in recognition of their particular economic difficulties let alone their particular historic links with Canada (1994: 5).

According to Bernal (1994), due to the recession and a declining desire to provide foreign aid funding, current U.S. foreign policy towards the Caribbean is also built on the elements of debt relief, investment promotion and "the emphasis is now on reciprocal, in contrast to concessional trade"⁵⁷ (1994: 216).

5.2 Canada in the World: The Government's Foreign Policy Framework

The Report of the Special Joint Committee of the Senate and the House of Commons Reviewing Canadian Foreign Policy (1994) and Canada in the World (1995) are the two key documents to emerge from the Canadian government's foreign policy review. Analysis of the objectives outlined in these documents reveals that the trends of Canadian foreign policy-making since 1980 where the

⁵⁷ This policy emphasis is embedded within the larger framework of the Enterprise of the Americas Initiative (EAI), announced by then U.S. President Bush in June 1991. The EAI consists of three parts: eventual creation of a hemispheric free trade zone through trade liberalization brought about by a series of free trade agreements; private investment promotion; and debt forgiveness (Bernal 1994: 216; Lewis 1991: 99-100).

"major priority" was "to enhance the Canadian economy through the establishment of new trade relationships" (Mahler 1993: 81) have been continued. These foreign policy frameworks also reinforce the directions that Canada has already been following away from the Caribbean.

The objective of Canadian prosperity and the principle of trade reciprocity combine to increase other regions' relevance to Canada and continue to push "the Commonwealth Caribbean...into the background as a matter of Canadian diplomatic concern" (Campbell 1992: 7). As Guy (1990) aptly predicted, the Canadian-Commonwealth Caribbean trade relationship would not be "a major factor influencing the formation of Canada's external policies" (1990: 275-6).

In addition, Canadian foreign policy concerns and the various instruments to carry them out have been closely integrated in Canada in the World (Government of Canada 1995).⁵⁸ In contrast to 1987, when CIDA put forth a separate policy framework for Canadian aid in Sharing Our Future, Canadian ODA policy was addressed in the Canadian foreign policy review process. As outlined in Canada in the World, the government's aim is to focus Canada's "dispersed" aid programme and concentrate on the objective of poverty reduction. This integrated foreign policy framework, and the principles of trade reciprocity

⁵⁸The government notes that in order to improve effectiveness, it will "work to strengthen program coherence" among the various foreign policy instruments towards developing countries, in order to achieve a common approach (Government of Canada 1995: 45). More specifically, Canada in the World links ODA to larger foreign policy objectives. CIDA is now quoting from this document on a regular basis in its current policy-making (Murchie, personal communication). See the introduction to CIDA (1995) for an example of this.

and poverty reduction, have certain implications for Canada's aid programme in the Caribbean.

5.2.1 Promoting Canadian Prosperity

In its report, the Committee reviewing Canadian foreign policy called for a "new foreign policy agenda" that reflected its view that "the most important global requirements for the 90s and beyond are for shared security, shared prosperity and shared custody of the environment" (Special Joint Committee of the Senate and the House of Commons 1994: 9). The report argued that Canadian prosperity "calls for a modern economy which has to be increasingly integrated into a prosperous global economy" and that this requires "energetic action to build trade, investment and technological links and strategic business alliances, combined with strong support for the widest possible liberalization of trade"⁵⁹ (Special Joint Committee of the Senate and the House of Commons 1994: 9). Asked to recommend regional priorities for Canadian foreign policy-making, the report argued that these priorities will depend on the "functions that engage" and reflect Canada's interests, values and comparative advantage in meeting its foreign policy objectives (Special Joint Committee of the Senate and the House of Commons 1994: 80).

⁵⁹In this context, the Committee also recommended that Canada work to strengthen "an effective system of world trade rules" (Special Joint Committee of the Senate and House of Commons 1994: 9).

Following these recommendations, the Government of Canada outlined three objectives in its foreign policy framework, Canada in the World (Government of Canada 1995). Noting that they will be carried out "against the backdrop of tight resources," the government stated that Canadian foreign policy concerns will be centred on the objectives of promoting prosperity and employment; global peace; and Canadian values and cultures abroad (Government of Canada 1995: 10 & 48).

The objective of Canadian prosperity "is at the heart of the Government's agenda" (Government of Canada 1995: 10). Within the context of realizing this policy objective, the government outlined key priorities which will be to strengthen and/or build economic relations with the U.S, Latin American, European Community and Asia-Pacific regions with the aid of reciprocal free trade agreements (Government of Canada 1995: 15-17). In this entire discussion, the Caribbean region is not addressed. However, the region is mentioned briefly, in conjunction, with Latin America, in the focus on Canadian development assistance.

5.2.2 Focusing on Poverty Reduction

The Committee reviewing Canadian foreign policy recommended that Canadian development assistance needs a clarified mandate and that this mandate

should project Canadian humanitarian values⁶⁰ by focusing assistance to the poorest of the poor (Special Joint Committee of the Senate and the House of Commons 1994: 48). In response to this, the government has stated that "the purpose of Canada's ODA is to support sustainable development in developing countries, in order to reduce poverty and contribute to a more secure, equitable and prosperous world" (Government of Canada 1995: 42).

Canadian ODA will be guided by the CIDA policy paper (1994d) on strategic programming for poverty reduction.⁶¹ It will focus on six programme priorities: basic needs; women in development; infrastructure services;⁶² human

⁶⁰ A CIDA poll which provided public opinion research into the foreign policy review process found that, in the minds of Canadians, aid seems to be justified when it is extended to the poorest of the poor or those who find themselves in disaster situations. The poll indicates that the top three reasons Canadians give for supporting aid are humanitarian (33.9%); Canadian self-interest (30.7%) and developmental reasons (21.4%) (CIDA 1994a: 10). Since 1991, there has been a trend indicating Canadians' belief that it is more important for Canada to provide aid for emergencies rather than for long-term development; "Emergency aid is now the most popular type of assistance" (CIDA 1994a: 12).

⁶¹ According to CIDA, a strategic approach to promoting poverty reduction will focus on labour-intensive economic growth, investment in human development and participation of the poor. Poverty reduction will guide programming in the areas of economic reform and private sector development. Economic reform programming will shift from balance of payments support to more long-term support to key sectors and institutions in Southern economies. Private sector development programming will be geared towards providing the poor with employment opportunities, directly supporting the private sector and creating an enabling environment for such activities (CIDA 1994d: 2). For further details, see CIDA (1994c; 1994d; 1994e).

⁶² The priority of infrastructure services replaced that of "public participation" recommended by the Committee (1994: 50). The government's choice not to include public participation as a priority of Canadian ODA programming is telling in light of the fact that after the recent budget cuts, the funding to CIDA's Public Participation Program of the NGO Division was eliminated.

rights, democracy, good governance; private sector development; and the environment (Government of Canada 1995: 42).

In addition, in responding to the Committee's argument that Canada's aid programme has been "too dispersed" and that a greater share of ODA should go to fewer countries (Special Joint Committee of the Senate and House of Commons 1994: 54), the government has stated that "Canadian ODA will support the purpose and programme priorities set out in key countries in Africa, Asia and the Americas" (Government of Canada 1995: 43). It is within this context that the Caribbean, in conjunction with Latin America, is mentioned.

In particular, the government pledges that "Africa will continue to receive the highest share of resources in keeping with the immense challenges that are facing that continent" (Government of Canada 1995: 43). Central and Eastern Europe, and the former Soviet Union are also mentioned as regions which will receive Canadian development assistance, although the programme will not be "funded at the expense of ODA priorities" (Government of Canada 1995: 46). Policy direction for this programme will remain with the Department of Foreign Affairs and International Trade, but programme delivery will be the responsibility of CIDA (Government of Canada 1995: 46).

Within the context of an integrated foreign policy framework, the principles of reciprocity in trade relations and poverty reduction in Canadian development assistance, are restructuring the nature and extent of Canada's aid programme in the Caribbean. As CIDA itself notes,

Canada's long standing 'special relationship' with the region is in transition. New pressures are coming from within Canada in the form of budgetary restraints and domestic economic restructuring. Externally, the demand for Canadian international assistance resources is growing and international trade relations between developed and developing nations are increasingly involving the principle of reciprocity (CIDA 1993: 2).

The next section will outline the changes in policy goals and objectives, structure and funding of CIDA's current programme for the Commonwealth Caribbean in order to highlight the current development directions being prescribed for the region by CIDA.

5.3 CIDA's Caribbean Programme: A Brief History

Momsen (1992) argues that common colonial traditions and political systems, as well as trade links, fostered the establishment of a Canadian development assistance programme in the Caribbean in 1958⁶³ (1992: 501). Since that time, Canada's development assistance to the region has totalled close to \$1 billion (Momsen 1992: 510). CIDA was created in 1968 and with its establishment came the capacity to fine tune and permanently anchor the importance of the Commonwealth Caribbean in Canada's aid programme. As Guy (1990) notes,

⁶³ Only Canada's involvement in the Colombo plan of the early 1950s preceded this first role as an international aid donor (Campbell 1992: 2; DAC 1994: 25).

[s]ince the creation of CIDA, the Caribbean has been the only area of the world that Canada singles out as a regional target for special treatment. The Caribbean was the first region in which Canada streamlined and stabilized its pattern of aid allocation and disbursement (1990: 282).

CIDA's Caribbean programme has included bilateral,⁶⁴ multilateral and non-governmental components and all have claimed a substantial share of CIDA's funding. 40%-50% of CIDA's Americas bilateral programme has gone to the Commonwealth Caribbean and within this, Jamaica and Guyana have been key recipients (CIDA 1993: 26; Momsen 1992: 510). Since the 1960s, Jamaica has received \$360 million for project assistance, commodity support and disaster relief. From 1981-1992, Canada extended US\$ 278 million to Jamaica, making Canada Jamaica's second largest bilateral donor. This support has ranked Jamaica as Canada's 6th-15th highest recipient of Canadian aid between 1981-1992 (DAC 1994: 52). The "motivating factor" for CIDA's bilateral aid programme in the Caribbean has been infrastructural development. Projects have been undertaken for airport expansion in Trinidad, Barbados and Jamaica; road and bridge-building in Jamaica; and construction of water supply and telephone systems and schools (Guy 1990: 282; Paragg 1988: 329).

The Caribbean has also been a recipient of funds from CIDA's multilateral programme, channelled through the international financial institutions and regional banks. As of 1992, Canada contributed 3.3% of the World Bank's

⁶⁴ CIDA's country programs within its bilateral aid program for the Caribbean consisted of Jamaica, Guyana and Regional programs, the Eastern Caribbean and Haiti (Mussell, interview, 1994).

funding, some of which is administered to the Caribbean (DAC 1994: 36; Guy 1990: 284). Along with Great Britain, Canada became the only non-regional member of the Caribbean Development Bank (CDB) in 1969, is its second largest contributor (Guy 1990: 278; Momsen 1992: 505) and sits on its Board of Directors (DAC 1994: 36). By the 1990s, Canada's contribution to the CDB exceeded \$100 million (Guy 1990: 283); in 1992, it contributed 10.4% of the CDB's funds⁶⁵ (DAC 1994: 36).

However, CIDA's Caribbean programme is currently in transition. It is characterized by a shifting programmatic thrust from concessional funding for infrastructural development to assistance designed to increase regional self-reliance and competitiveness and promote mutually beneficial relations; smaller size as national-level country programmes are amalgamated into one regional programme; and decreased funding as money is reallocated to other regional programmes.

5.4 CIDA's Caribbean Programme in Transition

As laid out in CIDA's draft Corporate Americas Strategy (CIDA 1993a), the agency's future policy directions in the Americas are aimed at: institutional

⁶⁵Canada's key contributions have been to the CDB's special development fund (SDF) which makes soft guaranteed loans for projects of "high developmental priority" and to the agricultural development fund (Guy 1990: 283-4; Paragg 1988: 327). In addition, Canada's membership in the Inter-American Development Bank (IDB) has translated into support for the IDB's special operations fund (\$264 million between 1964-1989) and its ordinary capital fund (\$317 million for the same time period), both of which assist infrastructural development (Guy 1990: 278-9).

strengthening and the promotion of human rights, democratic development, good governance and the empowerment of the poor; hemispheric integration; environmental management; and building Canadian interests (CIDA 1993a: 3). Key implementation strategies are the promotion of reciprocal strategic alliances and concentration on policy and governance issues (CIDA 1993a: 3). Within this policy document, the Commonwealth Caribbean is singled out regarding CIDA's strategic interest in reducing the "aid dependency" of the Commonwealth Caribbean and engaging instead in economic and cultural relations with the Caribbean that are "mutually beneficial" (CIDA 1993a: 6). This strategic interest, based on the principle of trade reciprocity, has major implications for CIDA's Caribbean programme.⁶⁶

5.4.1 Current Policy and Programming Directions: Emphasis on Reciprocity

In CIDA's Caribbean Regional Development Policy Framework (RDPF) (1993b), there is a clear emphasis on the principle of reciprocity in Canadian-Caribbean aid relations. CIDA's traditional focus on bi and multilateral lending

⁶⁶Promotion of Canadian economic interests within the context of Canadian development assistance is not new. Pratt (1994) argues that since the mid-1980s, a "new ideological climate" in which "the full and free operation of market forces and expanding foreign investment were accepted as central to development" has existed within CIDA due to the persistence of the Canadian business lobby and the then Conservative government's mandate (1994: 19-20). As Momsen (1992) notes, this neoliberal climate had already begun to affect CIDA's Caribbean programme. Since the mid 1980s, Canada's "emphasis on an aid-trade approach to foreign development assistance has seriously limited the country's development policy options for the Caribbean" (1992: 506).

for Caribbean infrastructural development has been slowly shifting to a neoliberal ideological framework which promotes self-reliance on the basis of increased competitiveness and macroeconomic reform. "Canada's policies towards the World Bank and the regional banks has been to support structural adjustment and growth policies, liberalisation of markets, and the strengthening of international integration"⁶⁷ (DAC 1994: 36). CIDA itself speaks approvingly of the "high degree" of policy convergence with the international financial institutions and other donors "active in the region" (CIDA 1993b: 4) and argues that "close collaboration with the IFIs with specific CIDA policy dialogue" should be continued (CIDA 1993a: 10).

CIDA's primary programming goal is to promote a sustainable, self-reliant Caribbean region and mutual interests (CIDA 1993b: 3). On the basis of a "more competitive and outward-looking economy," self-reliance is defined as the increased capacity to invest in social and economic infrastructure with local and foreign funds (CIDA 1993b: 3). With this goal in mind, CIDA's three objectives for the Caribbean are to build regional capacity to "compete in trade and for investment in the global economy;" to "achieve social equity;" and manage the environment (CIDA 1993b: 4). Increased competitiveness, economic liberalization,

⁶⁷ CIDA's initial commitment to structural adjustment was outlined in Sharing Our Future (1987), where structural adjustment was listed as one of six development priorities (CIDA 1987: 25). There is evidence that CIDA's position is shifting from the traditional emphasis on balance of payments support to longer term sectoral and institutional support in Southern economies (CIDA 1994d:2).

macroeconomic reform and future accession to NAFTA are put forth by CIDA as central to reducing the Caribbean's aid dependency (CIDA 1993b: 4).

Until the region becomes competitive to trade and as a place to invest it will continue to require high levels of concessional financing to support an adequate level of social and economic well-being (CIDA 1993b: 4).

Increased competitiveness and business activity will require a greater role for the private sector, public sector reform and appropriate policies for increased investment, free-flowing trade, efficient resource and transportation use and export promotion (CIDA 1993b: 5). NGOs are envisioned as playing a role in "supporting this transformation in economic production and management" (CIDA 1993b: 5). CIDA also notes that this competitive growth must be both socially and environmentally sustainable with solutions focused on productive employment, social policies which promote investment in education and training and building local capacity to manage the environment⁶⁸ (CIDA 1993b: 5). In order to implement these policy objectives, CIDA's programming strategy is focused on human resource and institutional capacity development, as well as

⁶⁸ CIDA outlines a multitude of internal constraints to achieving the objectives of social equity and environmental management. Constraints such as national deficits, land distribution, lack of training, policy biases, poor environmental awareness, analysis and planning capacities and lack of political will are mentioned (CIDA 1993b: 5). It is interesting to note that there is no mention of such external constraints to achieving the objective of increased competitiveness as trade barriers erected by Northern countries, like Canada, to competitive Caribbean apparel and footwear products. As Weston (1994) notes, the 25% tariffs in Canada on Caribbean clothing "probably deter a significant amount of trade" (1994: 4).

socio-economic adjustment. This strategy will be informed by gender and regional integration considerations (CIDA 1993b: 6).

5.4.2 National to Regional Level Programming

To achieve this policy and programming focus, the Caribbean programme is shifting from separate national programmes to a regional framework. This framework attempts to develop "a broader sense of the region" (Mussell, interview, 1994) and has come about for both external and internal reasons.

Reflection on the challenges and external forces affecting the region as a whole, not just the Commonwealth Caribbean, and future directions in CIDA, have led to the conclusion that a more integrated and enhanced regional approach is needed for the 1990s (CIDA 1993b: 1).

As stated earlier, traditionally the Caribbean programme has been divided into four national desks: Jamaica, Guyana and Regional Programmes, Eastern Caribbean and Haiti. Since 1993, the three Commonwealth country programmes have been amalgamated into one administrative desk under the Caribbean Division with a subsequent decrease of personnel at CIDA and in the field (DAC 1994: 52; Mussell, interview, 1994). Country Policy Frameworks (CPF), like that developed for Jamaica in 1992,⁶⁹ have been subsumed under the Caribbean RDPF (CIDA 1993b).

⁶⁹ The goal of this Jamaica CPF was to achieve sustainable development by prioritizing debt reduction and monetary stabilization, environmental management, good governance and poverty alleviation (DAC 1994: 52).

5.4.3 Reduction in Funding

This smaller, regional-level Caribbean programme has seen its funding reduced substantially. Both poverty concerns and consideration of Canadian economic priorities are indicated as factors. Pointing to both the "enormous asymmetry in the traditional allocation of Canadian aid to the region," as well as "Canadian interests," CIDA has proposed reallocating funds to South American countries which have "higher levels of poverty and developmental needs as well as greater long-term prospects for development" (CIDA 1993a: 8 & 14). In addition, in discussing the need to reduce the Caribbean's "aid dependency," CIDA argues that "[t]his is not only a developmentally sound goal, but could be required by budgetary restrictions or new government priorities to assist Eastern Europe or other new demands" (CIDA 1993a: 26).

In the last four to five years, as CIDA's budget has been cut, the Caribbean programme has taken a larger portion of budget cuts in relation to other regional programmes. In 1993, the funding to Haiti was increased (\$25-30 million was allocated) without an increase in the overall Caribbean budget, such that other Caribbean programme areas received even less (Mussell, interview, 1994). In 1986-7, Jamaica received \$35 million, making it CIDA's 6th major recipient of bilateral ODA; in 1992, this allocation dropped to \$20 million, lowering Jamaica to CIDA's 15th major recipient (DAC 1994: 23-4). In contrast, in 1986-7, Peru received \$23 million in bilateral funding; by 1992, this had increased to \$32 million (DAC 1994: 23). With the recent budget cuts of 15% -

20% to CIDA in the February 1995 budget, the Caribbean was hit somewhat harder than other regional programmes. As one CIDA official puts it, the programme has "bottomed out" and is down to the "bare bones" (Mussell, interview, 1995).

Conclusion

In this chapter, I show that while there has been, historically, a special relationship between Canada and the Caribbean, this relationship is being transformed due to such interconnected factors as decreasing strategic importance of the Caribbean and the prevailing neoliberal ideology which guides Canadian foreign policy discourse. This discourse prioritizes free trade, increased competitiveness and the principle of trade reciprocity, not concessionality, in external relations. This principle, along with a reaffirmed commitment to direct Canadian aid to the poorest of the poor, has created a context of transition for Canada's development assistance programme in the Caribbean. CIDA's policy goals and objectives for the Caribbean, have converged with those of the international financial institutions, to prescribe a development model for the region designed to reduce aid dependency and promote trade reciprocity through increased competitiveness, trade liberalization and privatization. Within CIDA's framework, NGOs are envisioned as having a role to play in facilitating such an economic transformation.

This is the broader context of operations and engagement for progressive Canadian NGOs active in the Caribbean. An understanding of the political-economic context in which progressive Canadian and Jamaican NGOs are active is crucial to an analysis of their relations with each other. As already argued, NGOs and their concept of partnership differ on the basis of their respective vision of development, analysis of structural relations affecting the development process and strategy for most effectively addressing these structural relations. NGOs' analysis of the political-economic context in which they operate shapes their priorities and programming strategies and their choice of partners to most effectively realize these strategies.

CIDA envisions a particular role for NGOs in the Canadian-Caribbean aid relationship. The question to examine is how progressive Canadian NGOs envision their role, priorities and relations with Caribbean NGOs in this context. This chapter has set the stage for Chapter 6 which outlines my case study of partnership between progressive Canadian and Jamaican NGOs within the context of changing Canadian-Caribbean relations. In Chapter 6, I examine the progressive NGO agenda in the Caribbean by looking at the process and content of progressive Canadian and Jamaican NGOs' programming in the Caribbean as they engage in and challenge this changing political, economic and ideological context at both micro and macro-levels.

Chapter 6: The Progressive NGO Agenda in the Caribbean: Strategic Responses by Canadian and Jamaican NGOs and the Implications for Partnership

Introduction

In order to establish the parameters and the context of the case study to be examined in this chapter, I will briefly recap the lessons learned from previous chapters. I argue in Chapter 3 that NGOs are not an homogenous community, but are in fact, a highly differentiated group of actors in the development process. With the aid of theoretical frameworks for distinguishing NGOs outlined in this chapter, progressive NGOs have been characterized as those which explicitly link an empowerment agenda and programming strategies and take an empowerment approach to participation at the local level. I conclude the chapter with the observation that little study has been devoted to examining progressive NGOs' approach to partnership, and more specifically, participation at the North-South NGO level.

In Chapter 4, I examine the reformist and solidarity frameworks of partnership and outline their conceptualizations of the operational and political dimensions and context of relations between Northern and Southern NGOs. I argue that while participation, particularly at the programme planning and decision-making level, has been seen as key to achieving equality and a transfer of power in North-South NGO relations, the concept has not been adequately defined or its constraints addressed.

In Chapter 5, I outline the broader context in which partnership between progressive Canadian and Jamaican NGOs is embedded by highlighting the

political-economic and ideological dimensions of the changing relationship between Canada and the Commonwealth Caribbean region. I argue that Canadian foreign policy objectives are being guided by the principle of trade reciprocity and more particularly, that ODA objectives are being guided by the principle of poverty reduction. I argue that it is within this context that the restructuring of CIDA's programming in the Caribbean to focus on reducing the region's "aid dependency" through increased economic competitiveness, trade liberalization and macroeconomic reform may be understood. CIDA is envisioning a particular model of development for the region and a particular role for NGOs in this context.

Progressive NGOs are envisioning an alternative development model and role for themselves in this broader context of change in the hemisphere. My objective in this chapter is to analyze the programming choices which have been made by progressive Canadian and Jamaican NGOs within the context of changing Canadian-Caribbean relations and the broader model of development in which these relations are embedded and the impact of these choices on progressive Canadian-Jamaican NGO relations. My second objective is to examine the process by which these programming choices have been made.

To carry out these objectives, I first illustrate how the progressive Canadian NGOs which participated in this study are engaging in the wider political-economic context of change by outlining their programmes, strategic directions and thematic priorities for the Caribbean region. I show that these

NGOs are restructuring their Caribbean programmes to develop Americas- or region-wide, thematically-based programmes. Like CIDA, progressive Canadian NGOs are taking a consolidated regional approach to programming in the Caribbean. However, these NGOs' goal is not to facilitate trade liberalization or increased competitiveness in order to promote trade reciprocity with Canada. They emphasize a search for alternatives and popular participation in national decision-making processes. Their goal is to integrate regional and Canadian programmes around common hemispheric problems of globalization and economic integration and build coalitions, networks and alliances to carry out these strategic goals.

Second, I review progressive Jamaican NGOs' responses to the current Jamaican development model. I show that there are many points of convergence in programming between Canadian and Jamaican NGOs which would provide a basis for building solidarity networks at the programmatic level. However, I argue that certain aspects of progressive Canadian NGOs' current programming trends are shifting the axis and scale of Canadian-Jamaican progressive NGO relations. Progressive Canadian NGOs are consolidating Americas programming around particular themes, linking Canadian and overseas programming around issues of mutual concern and directing funding towards umbrella NGOs. Such programming trends are not problematic in themselves, if they are grounded in the multiple realities of all the regions represented in the programme. However, I argue that these trends not only de-emphasize the varied realities of the

Caribbean region in favour of an emphasis on the Latin American context, they ignore the specific nature of certain Caribbean umbrella organizations. This situation highlights the necessity of incorporating a broad range of perspectives, experiences and analyses into NGOs' programme planning and priority-setting.

Third, I review the processes involved in setting progressive Canadian NGOs' strategic priorities in the Caribbean. Based on information gathered through qualitative interviews, I show that at a conceptual level, these progressive NGOs embrace a solidarity framework of partnership and identify mutual participation in priority-setting and decision-making as one key component to building relations of solidarity between Northern and Southern NGOs. However, I demonstrate that, at the practical level, important constraints have limited the capacity of these progressive Canadian and Jamaican NGOs to engage in participatory processes of priority-setting and decision-making.

I conclude the chapter by arguing that these findings regarding programming trends and the processes of setting programming priorities have important implications for the future practices of progressive NGOs and contribute to the development of a more nuanced conceptual framework of participation within the solidarity framework of partnership.

6.1 Progressive Canadian NGOs : A Strategic Approach to Programming in the Americas

I think the world itself, on the whole, is on a turning point and more and more people are recognizing that we are at a sort of end of civilization crisis. We are at the turning point for the whole globe. What we are seeing is the collapse of the conflict or dialectic between capitalism and communism because one of them has gone under and the other one is shouting victory. But that has only really transferred the struggle to another level and basically, I think we are all searching for a way forward in terms of the economic path, in terms of the political structures, in terms of technology and in terms of the value system (Levy, interview, 1995).

The above quotation, which alludes to *crisis* and a *search for alternatives* to resolve this crisis, captures the essence of the progressive Canadian NGO analysis and strategy vis-a-vis the Caribbean region and beyond. Inter Pares (1995) talks of "a crisis in global development" whereby the paradigm of "globalized free market principles as the motor of global development" reigns supreme and alternative economic and democratic models are scorned or suppressed, at times "with deadly force or sabotage" (1995: 7). Characterized by the globalization of capital and production and the subsequent decline of economic and political sovereignty of nation-states, this new world order is overseeing the decrease in state responsibility and capacity to provide for its citizens economic and political rights and the deterioration of local economies and communities (Inter Pares 1995: 7). In a shift from a formerly bi-polar world organized around geo-political concerns, "geo-economic relations" now predominate (Oxfam 1994: 2). The global context is now also witness to increased fundamentalism and feminist backlash (MATCH 1994: 3). Within this context, civil society is emerging as "the locus of

social cohesion and the platform of political struggle and competing paradigms" (Inter Pares 1995: 7). As key organizations within civil society, NGOs are seen as principal actors in the search for alternatives to the current hegemonic development model.

Thus, the search for alternatives to the dominant development model in the hemisphere is the broader context in which the changes in progressive Canadian NGOs' programming in the Caribbean must be understood. Macdonald (1993) notes that "increasing recognition of the weight of national and international forces in local development" is causing progressive Canadian NGOs to "focus their efforts more intensely on policy design and implementation, lobbying and coalition formation"⁷⁰ (1993: 126). The progressive Canadian NGOs' agenda in the Americas is built upon the recognition of the interdependence of issues, like debt, SAPs and the NAFTA, in Canada and in most Southern countries in the hemisphere. It is geared towards building a hemispheric collectivity of common interests which promote alternatives, based in the experiences of those excluded from the policy-making process, to the NAFTA-propelled economic growth model that is being prescribed for the entire hemisphere by CIDA, the international financial institutions and the corporate agenda. As Chris Rosene, Director for the Americas Desk at CUSO states,

⁷⁰Over the years, progressive Canadian NGOs have done much soul-searching, often encouraged by Southern partners. They have come to the realization that their relevance lies not in implementing projects overseas, but in working in their own context, challenging and developing policy and linking progressive social movements North and South (McAfee 1991: 220-21; Murphy 1991: 180-81).

We're basically hearing from the proponents of globalization from above that this is the only way to go, there is no alternative, in fact, we should give up. Our programme is all geared to not giving up, to saying, well, we don't like it, we think there's another way, and we're going to support those who are looking (Rosene, interview, 1995).

However, as Macdonald (1993) notes, other imperatives are having an effect on progressive Canadian NGOs' programming. "Budgetary pressures...will mean that Canadian NGOs will have to make better use of their resources" (1993: 126). Progressive Canadian NGOs' decisions regarding their Caribbean programming have been affected by recent budget cuts to Canadian development assistance.⁷¹ As Catherine Hyett, former Caribbean programme officer of Oxfam-Canada, notes, "All over the Mulroney period, there was this real fear that funds would be cut off or slashed and that, in fact, development agencies were in an extremely vulnerable position and would really have to pay attention to the bottom line, if they were going to survive" (Hyett, interview, 1995). This trend of prioritizing deficit reduction and adhering to the "austerity principle" has continued under the Liberals. As Martin (1995) argues, current Canadian political discourse is structured around the notion that "all dimensions of political life must now be weighed against our generation's *raison d'être*: debt reduction" (Martin

⁷¹Budget reductions manifested themselves at the level of staff time devoted to Caribbean programming among NGO members of the IAWG on the Caribbean (listed in Chapter 2). As Oxfam-Canada (1993) notes, "In recent years funding and other support for Caribbean programming within these organizations has gradually been reduced until, now, Oxfam-Canada is the only organisation with a full-time staff member dedicated to Caribbean programming" (1993: 26).

1995: 20; emphasis in original). In the February 1995 budget, CIDA funding was reduced by 20%.⁷²

Thus, to ensure their own survival and achieve a greater programmatic impact, progressive Canadian NGOs are recognizing the need to use scarce resources as "strategically" as possible and create more focused programmes based on the concept of strategic management.⁷³ CUSO is one example of a progressive Canadian NGO that has incorporated a system of strategic management to "achieve greater efficiencies and effectiveness" (CUSO 1995: 8 & 20).

Finally, another important factor that has inspired the changes in programming is progressive Canadian NGOs' own analysis of the Caribbean region. They argue that the particular developmental challenges facing the Caribbean, a region composed of tiny micro-states whose economies are eroding in a globalizing community composed of trading blocs, necessitate regional approaches whereby Caribbean NGOs address problems as a group and "maintain

⁷²According to a CIDA official, the effects of these cuts were that the CIDA bilateral program took a cut of 15% to 20%. NGOs were affected to varying degrees as they were reviewed on a case by case basis, depending on performance and CIDA priorities. There was an attempt to preserve domestic NGOs and cut a bit more heavily on international NGOs. The predicted outcome of these cuts on NGO operations in the Caribbean is that they are "likely to drop" (Mussell, interview, 1995).

⁷³Strategic management has been defined as "the fundamental choices that guide the use of resources and day to day actions" and is divided into the four main tasks of identification of strategic values; focus on strategic issues; formulation of strategy; and strategy implementation-action (ADA 1994b: 4).

geographic coherence" (Seabrooke, interview, 1995). In a similar vein, they argue that Canadian programming in the Caribbean should facilitate linkages between Caribbean and Latin American NGOs because "the Caribbean is a region that really needs to expand in its context" (Rosene, interview, 1995).

Motivated by the desire to link their overseas and Canadian programming to build a hemispheric movement for progressive social change, the need to use scarcer resources more strategically and their own analysis of the development challenges of the Caribbean region, progressive Canadian NGOs have restructured or plan on restructuring their Caribbean programmes. They have consolidated their programmes in the Caribbean into Americas or regional programmes, along thematic, not geographical lines, and have targeted most of their funding to umbrella groups in the region working on policy issues. Within these programmes, progressive Canadian NGOs are prioritizing policy development and advocacy and coalition and network building. The next sections will outline the particular programmatic changes of the four progressive Canadian NGOs which participated in this research project.⁷⁴

6.1.1 Oxfam-Canada

⁷⁴As stated, the following analysis is based on the work of the progressive NGOs interviewed for this research. Some conventional Canadian NGOs, like the Canadian Cooperative Association (CCA) are also taking a regional approach to their programming in the Caribbean (Murchie, personal communication).

Oxfam-Canada's programme in the Caribbean has undergone significant change as the agency has consolidated its formerly individual Andean, Caribbean, Central American and Canadian programmes into one Americas Programme.⁷⁵ As Catherine Hyett notes, "there was agreement over time that we had to make the programme more focused, more relevant and develop a programme that was going to, hopefully, make a greater strategic impact [and] make a contribution to a broader movement for change" (Hyett, interview, 1995).

Oxfam's Americas Programme (1994-1997) has proposed certain strategic directions which "respond to our analysis of the changing situation in the hemisphere and how Oxfam-Canada's scarce resources can be applied for greatest effect" (Oxfam 1994: 15). Oxfam aims to build an analysis of the forces at play in the hemisphere, rather than continue with separate regional analyses. Increased support will be directed to fewer partners. It will increasingly emphasize its role in policy and advocacy work around the two organizational themes of *democratic rights* and *economic integration* and direct strategic support to coalitions, networks and alliances at all levels. In addition, a programme in Cuba will be initiated and a field office established in Havana (Oxfam 1994: 15).

Catherine Hyett notes, "increasingly there has been this attempt to move away from solely regional-based programming to thematically-based

⁷⁵ The Oxfam-Canada Americas program now covers the whole of the Caribbean region. Since the 1970s, when Oxfam-Quebec split from Oxfam-Canada, the latter's Caribbean program and partners were concentrated in the English-speaking region except for regional partners which had members or affiliates in other language areas of the Caribbean (Hyett, interview, 1995).

programming...from this notion of having, overseas at least, these three almost entirely discrete geographic boxes that were called programme" (Hlyett, interview, 1995). Oxfam's programme framework is organized around two thematic areas: democratic rights and economic integration. Oxfam's work in democratic rights is aimed at supporting social organizations which are addressing human rights issues, ensuring people's right to participate in making decisions that affect their lives, and building internal democracy, particularly at the level of gender equity within community based organizations (Oxfam-Canada 1994: 12-13). Economic integration work is aimed at supporting social organizations which are challenging and creating alternatives to the dominant economic model in the hemisphere, economic restructuring and free trade (Oxfam-Canada 1994: 14).

There is a deliberate attempt by Oxfam to integrate gender issues into its analysis, programme initiatives and partnership criteria. Both thematic areas of programming prioritize action to promote gender rights and women's empowerment and participation in the economic realm (Oxfam 1995: 16). In particular, *Women in the Americas: Changing the Terms of Trade*, is Oxfam's new Americas programme initiative which will be linked with its Canadian programme and cover issues in both thematic programming areas. Its goal is to "promote women's participation within the debate about economic restructuring and sustainable, just alternatives" by way of exchanges, networking, education and advocacy, research and campaigns (Oxfam 1995: 35). Finally, Oxfam has developed a gender policy which will guide its selection of partners based on their

"gender sensitivity" (Hyett, interview, 1995) and its strategy to assist Southern counterparts to "actively promote women's participation" within their organizations (Oxfam 1995: 16).

Table 1

Oxfam's Caribbean Partners 1993-94 Caribbean Programme	Oxfam's Caribbean Partners 1994-97 Americas Programme
National Agency for Rural Transformation (Grenada) Social Action Centre (Jamaica) Sistren (Jamaica) Amerindian People's Association (Guyana)	National Agency for Rural Transformation (Grenada) Federacion de Mujeres Cubanas (Cuba) Amerindian People's Association (Guyana)
Regional/National Caribbean Association for Feminist Research and Action/ Working Women for Social Progress (Trinidad)	Regional/National Caribbean Association for Feminist Research and Action/ Working Women for Social Progress (Trinidad)
Regional Caribbean Policy Development Centre Assembly of Caribbean People Caribbean Network for Integrated Rural Development	Regional Caribbean Policy Development Centre Assembly of Caribbean People
TOTAL 9 Organizations	TOTAL 7 Organizations

Compiled from Oxfam-Canada (1993: 19; 1994: 27-30).

As Table 1 shows, Oxfam's 1993-94 Caribbean Programme supported a larger number of Caribbean organizations than its current Americas Programme. The number of Caribbean NGOs has been reduced from nine to seven organizations.

What is most interesting to note, from the perspective of Jamaican NGOs, is that none of Oxfam's current Caribbean partners are from Jamaica.

6.1.2 Inter Pares

Inter Pares has had a long history of working with a large number of organizations in the Eastern Caribbean. However, finding that its "capacity to relate to so many organizations in an authentic way was limited" and feeling that policy development and advocacy were priorities, Inter Pares undertook a review of its Caribbean Programme in 1994 (Seabrooke, interview, 1995). The result of this exercise was the development of a framework for relationships with organizations in the Caribbean (Inter Pares 1994). Based on this framework, the number of Inter Pares' Caribbean partners has been reduced and funding redirected to focus on four organizations instead of sixteen (Seabrooke, interview, 1995).

Inter Pares outlined some aspects of this framework in its programme plan for 1995-1999.

The most significant refinement of our program in the Caribbean will be to reduce the number of direct support relationships at the local and national levels. We will instead work primarily with regional organizations and coalitions on issues common to our Caribbean counterparts, and our counter parts in other regions of the world. We will focus on action that, while rooted in local problems and social actions, is regional in scope, promotes collaboration among actors throughout the region, and has potential for South-South collaboration (Inter Pares 1995: 45).

Within this framework, Inter Pares also aims to build relationships and carry out work with Caribbean NGOs which have the potential for transformation and mutual learning, support and policy development. The relationship would be based, not on financial exchange, but on the capacity to meaningfully engage and on shared ideology, values, priorities and mutuality of struggle. In addition, the work would correspond to Inter Pares' strategic thematic priorities⁷⁶ (Inter Pares 1994).

Integration of gender theory and practice is key to Inter Pares' work.⁷⁷ The agency has developed an "analytical tool" based on feminist theory and praxis which guides its programming to ensure that "women would be central to any work we did and programs would challenge power relations and oppressive structures" (Seabrooke 1993: 2). In the context of Inter Pares' framework for relationships in the Caribbean, another criteria is that feminist analysis and methods would be valued by partners (Inter Pares 1994).

In addition, within this framework for collaboration and Inter Pares' overall programme framework, women's organizing and policy development initiatives will be emphasized as women's organizations "are among the most

⁷⁶ Inter Pares has also organized its programming work around six interrelated thematic axes of action which "cut across conventional geographical and sectoral categories" (Inter Pares 1995: 23). These thematic priorities are *security; abandonment; culture; governance; population; and migration*. For further details, see Inter Pares (1995: 23-4).

⁷⁷ Inter Pares' internal structure is also organized according to such feminist principles and processes as parity, consensus, gender balance, power-with, openness about conflict and avoidance of dichotomies (Seabrooke 1993: 3).

dynamic and creative in the Caribbean region" (Inter Pares 1995: 45). The four partners that Inter Pares has chosen to work with in the Caribbean are primarily umbrella NGOs which support feminist perspectives and address policy issues: the Caribbean Policy Development Centre (CPDC), the Caribbean Association for Feminist Research and Action (CAFRA), the Association of Development Agencies (ADA) and the Sistren Theatre Collective (STC) ⁷⁸ (Seabrooke, interview, 1995). CPDC, in particular, is seen by Inter Pares as its "main access to the Caribbean" because by extension, it reaches many local organizations (Seabrooke, interview, 1995).

6.1.3 MATCH International Centre

From the time that MATCH International Centre ⁷⁹ developed its first three year strategic plan in 1990, to the development of its second plan for 1994-1999, the decision was made to focus the organization's work by consolidating programming in fewer countries in each of the regions of English and francophone Africa, Asia, Latin America and the Caribbean. In light of persistent financial constraints, in support of the consolidation of MATCH's work and in keeping with its strategic plan, MATCH's Executive Director, Madonna Larbi, indicated staff concern that "we cannot be everywhere" and therefore cannot "spread ourselves too thin" (Larbi, interview, 1995). This was coupled by the acknowledgement that the women's groups MATCH was supporting needed more money to do their work effectively (Larbi, interview, 1995). This consolidation has applied to MATCH's entire overseas programming, not solely the Caribbean region, although it has been affected (Larbi, interview, 1995). In the 1994 strategic plan, MATCH outlined the reasons behind its choices of country

⁷⁸ Sistren is the only non-umbrella Caribbean organization that Inter Pares is working with.

⁷⁹Due to the inherent nature of the organization, MATCH-International explicitly addresses issues of gender. It is a Canadian women's organization, guided by a feminist vision of development, which supports women's organizations in promoting women's empowerment and enjoyment of their full human rights (MATCH 1994: 2).

focus: lower administrative costs and practicality due to the proximity of one country to another; potential for forming networks with other countries; marginalization by donor countries and other NGOs in certain countries; and potential for funding sources that already exist in certain countries (MATCH 1994: 16).

MATCH's Caribbean programme will focus on Jamaica and Trinidad and Tobago and establish a watching brief on Haiti (MATCH 1994: 16). The Jamaican partners in fiscal year 1994-95 are the Sistren Theatre Collective (STC) and Mediawatch (Larbi, interview, 1995). As outlined in the 1994-99 strategic plan, when project cycles come to an end, partnerships will be reviewed. MATCH's mandate, which is "to support emerging initiatives, emerging groups" will dictate future partners (Larbi, interview, 1995). MATCH's work will continue to be organized around the thematic priorities first established in 1990: *elimination of violence against women*⁸⁰ which has both legal and social/cultural components; and *women and sustainable human development* which entails leadership training and networking and economic development aspects. These two themes will be integrated into the Words of Women Programme which focuses on the following components: advocacy through publications; public education; workshops/lectures; and expression

⁸⁰ The theme of violence against women has been broadly defined, not just in physical violence terms, but also in terms of structural violence. As Larbi notes "the elimination of violence against women is an integral part of women's development and the development process in a country...We cannot really as in the past speak of violence against women as one thing separate from gender and development...it's a violation of their human rights" (Larbi, interview, 1995).

of women's lived experiences, traditional knowledge and emerging initiatives (MATCH 1994: 15-18).

6.1.4 CUSO⁸¹

CUSO Caribbean, in a consultative process⁸² with regional partners, allies and colleagues in the CUSO Secretariat, developed a four year (1994-1998) strategic plan, largely for the English-speaking areas of the Caribbean region. In an evolution from CUSO's earlier three year plan which focused on structural adjustment and debt in the Caribbean region, this programme is organized around promoting the theme of *globalization-from-below* and building three-way linkages between the Caribbean, Central America and the Caribbean diaspora in Canada and the Central American coast (CUSO Policy and Planning Unit 1995: 16; Rosene, interview, 1995). According to Chris Rosene, Director of the Americas Desk, "[C]ertainly we're moving more from issues that affected the region to issues that are affecting the globe and how they are manifested in particular in

⁸¹ CUSO occupies a unique position in the Caribbean and as such, some clarification of terminology is required. The CUSO Secretariat in Ottawa, which oversees the Caribbean programme as part of the Americas Desk, must be distinguished from CUSO-Caribbean, CUSO's regional field office based in Kingston, Jamaica. (This office serves Jamaica and Belize. CUSO has another office in Antigua which serves the Eastern Caribbean islands of Dominica, St. Kitts, St. Lucia, St. Vincent and the Grenadines). The recent process of planning CUSO programming for the Caribbean region was under the purview of the regional field office, which is staffed by Caribbean nationals.

⁸² This consultative process will be discussed in greater length later in this chapter.

the Caribbean" (Rosene, interview, 1995). According to CUSO, globalization-from-below

aims to restore to communities the power to nurture their environments; to enhance the access of ordinary people to the resources they need; to democratise local, national and transnational political institutions; and to impose pacification on conflicting power centres⁸³ (CUSO Jamaica 1993: 8).

In order to promote globalization-from-below, the CUSO Caribbean programme plan has five components: research and evaluation; institutional strengthening; networking and exchanges; alternative economic strategies; and disaster preparedness⁸⁴ (CUSO Policy Planning Unit 1995: 16). Within these programmatic components, gender issues are considered at the level of anticipated results. There is a commitment to increased understanding and analysis of the impact of the globalized economy on women; increased earning capacity of poor women due to the development of economic alternatives; and increased participation of women at the community level in the development process⁸⁵ (CUSO 1995: 16).

⁸³ The concept of "globalization from below" was originally outlined by Richard Falk in Global Visions. Ed. Brecher, Childs & Cutler. Boston: South End Press, 1993.

⁸⁴ See CUSO (1993: 7-12); CUSO (1994: 1-4); and CUSO (1995: 16) for full details of these five components.

⁸⁵ At the organizational level, one of CUSO's five objectives is to "promote gender and racial equity in all areas of work" with the aim of increasing the number of women in leadership roles and building gender awareness and analysis in partner organizations. In addition, CUSO aims to implement a Gender and Development Action Plan which will integrate gender analysis and criteria into programme planning and evaluation; promote feminist organizational structures and methods; and ensure gender sensitive communications material (CUSO 1995: 7).

However, other factors may affect the future implementation of this programme as originally planned. As outlined in the CUSO Secretariat's Strategic Vision, formulated in the 1994 document, "Partnerships for Social Justice,"⁸⁶ the agency's current Caribbean programme will be decreased in size and integrated with its Latin American programme and future CUSO work will be organized around the two organizational themes of *building sustainable livelihoods and cultural affirmation of aboriginal peoples* (Rosene, interview, 1995).

In CUSO's past strategic plan, the agency worked in partnership with both local development agencies in Jamaica, Belize and the Eastern Caribbean and regional organizations such as the Caribbean Policy Development Centre (CPDC), Caribbean Association for Feminist Research and Action (CAFRA) and the Caribbean Network for Integrated Rural Development (CNIRD) (CUSO 1994: 3). This current array of partners may change due to a number of interconnected factors. First, research done throughout CUSO-Caribbean's four-year regional plan will identify partners that are working on the theme of globalization and towards economic alternatives (Rosene, interview, 1995). Second, the final implementation of CUSO's Gender and Development Action Plan will also integrate gender criteria in the agency's choice of partners (CUSO 1995: 7). Third, "[F]rom 1995 to 1998, CUSO will examine each of our

⁸⁶ Unfortunately, at the time of writing this thesis, this document was not yet available for public view. The effects of its recommendations and recent budget cuts on CUSO's Caribbean program remain to be seen.

partnerships in light of the Strategic Vision, a vision that emphasizes the need to work on alliance-building and to engage in policy dialogue" (CUSO 1995: 11).

This review of progressive Canadian NGOs' current Caribbean programmes highlights a number of commonalities. In general, these Canadian NGOs are restructuring their Caribbean programmes or consolidating their Caribbean and Latin American programmes to focus their support on organizations which are searching for alternatives and promoting participation of civil society in national decision-making processes. They are integrating regional and Canadian programmes around common hemispheric issues of globalization, free trade, economic integration, migration and women's and aboriginal rights. They are focusing on building coalitions, networks and alliances and developing policy to carry out these strategic goals.

Many of these strategies are similar to those of progressive Jamaican NGOs. The next section briefly outlines the current development model being prescribed for Jamaica and the programmatic response of progressive Jamaican NGOs to this model and its effects.

6.2 The Current Jamaican Development Model

As Judith Wedderburn, a member of the Association of Caribbean Economists (ACE) points out, the current development model "in any particular Caribbean country would relate, more or less, to which stage of the adjustment process they are in" (Wedderburn, interview, 1995). As Caribbean scholars

argue, within the context of Caribbean balance of payments, fiscal and debt crises, SAPs "have become the panacea for our economic problems. Indeed, they have become synonymous with development, even with economic transformation" (Antrobus 1990: 1). Both the austerity phase (reduced expenditure and employment in the government sector) and the growth phase (currency devaluation, price decontrols and trade liberalization) of SAPs have wrought extensive economic and social costs on Caribbean people.

Jamaica is one of the most indebted nations, relative to GNP, in the South. Since 1977, it has been undergoing structural adjustment programmes to pay back its debt,⁸⁷ owed mainly to the international financial institutions and bilateral donors (Levitt 1991: 4). Levitt (1991) argues that the IMF and World Bank, by way of their loan conditionalities, have become the true economic managers of the country (1991: 1). Further, Bogues (1994) points out that the boundaries between macroeconomic management and political authority are being blurred, as World Bank conditionalities have obliged the Jamaican government to approve a consumption tax and bring forth legislation on financial and banking regulations (1994: 24).

The 1994-95 budget of the People's National Party (PNP) government of Jamaica, allocated 49.90% of the budget to debt servicing. This is in contrast to the 19.37% of the budget allocated to social and community services, with

⁸⁷In 1990, this total external debt stood at \$4.5 billion. This amounted to \$1800 per capita whereas GNP per capita approximated \$1200 (Levitt 1991: 1). See Levitt (1991) and Bogues (1994) for a thorough discussion of Jamaica's debt crisis.

education and culture receiving 10.43% and health 5.02% of this total (ADA 1994c: 1). The effects of these debt reduction measures due to SAPs are being mediated along class, racial and gender lines. "The rich are getting richer, the poor are getting poorer. In Jamaica, the income gap is worse than it has ever been in our history, in post-independence years" (Wedderburn, interview, 1995). Low-income black Jamaican women have been hardest hit in terms of intensification of labour, reduced access to resources and services and declining earnings⁸⁸ (Commonwealth Secretariat 1989: 26). The response to the conditions created by SAPs is being felt in terms of increasing violence and crime, cultural alienation and migration. In the late 1980s, migration claimed 80% of Jamaica's natural population increase (Levitt 1991: 10). It is within this context that progressive Jamaican NGOs are carrying out their search for alternatives.

6.3 Progressive Caribbean and Jamaican NGOs: Alternative Paradigms of Development

According to Lewis (1994), the progressive NGO sector in the Caribbean⁸⁹ has traditionally been reflective of an alternative development

⁸⁸This differential impact, Caribbean feminist scholars argue, is due to the gender ideology in which both phases of SAPs are grounded. These programs are not neglectful of Caribbean women, they are deeply exploitative of their time, labour and needs in that women fill the social gaps left by austerity measures and take the low-paying jobs available in export-processing zones (Baksh-Soodeen 1994).

⁸⁹ See Baker (Baker 1993: 345-47; Baker & Levy 1993: 2) for a discussion of the long history of both secular and religious volunteerism in the Caribbean region. Community organizing played a key role in movements for emancipation from

paradigm and feminist and women's organizations, in particular, have been the most advanced in linking macro and micro-level analyses and issues of class, race, ethnicity and nationality (Lewis 1994: 126-7). The crises of economic stagnation, debt and impoverishment under SAPs and decreasing political legitimacy in the region have fostered new paradigms of development from progressive NGOs⁹⁰ (Lewis 1994: 129). As Murchie (1993) points out, "Recognizing the dominant development model, based upon SAPs, as an hegemonic discourse which privileges a narrow reading of economic privileges, progressive NGOs are creating an alternative discourse which is based upon people-centred development" (1993: 9). These alternative paradigms focus on engaging grassroots organizations in the formulation of policies and alternative models of economic development and in the decision-making processes that affect their lives (Baker 1993: 347; Lewis 1994: 131).

According to Judith Wedderburn, progressive Jamaican NGOs have been taking, by necessity, a long-term, pragmatic and multilayered approach to promoting alternatives to the current Jamaican development model. They have

slavery, land reform, economic development and independence.

⁹⁰ NGOs have also been important in this context because they have provided an alternative to those who have lost faith in increasingly authoritarian, corrupt and unresponsive political parties and trade unions which have lost legitimacy by not being able or willing to channel the energies and solutions of people who have been hardest hit by SAPs -- the urban poor, rural communities, informal sector and poor women (Baker 1993: 349; Lewis 1994: 127). In addition, NGOs have been called upon to replace the weakened state in the provision of basic needs and services under SAPs (Baker 1993: 350).

been working at the international level to push for reform of the international financial institutions;⁹¹ at the national level to pressure national governments to live up to their responsibilities to their citizens; and at the community level to encourage alternative ideas and values (Wedderburn, interview, 1995).

6.3.1 Programming Priorities of ADA⁹² and its Member Agencies

This multifaceted approach is reflected in the six goals outlined in the 1994-1998 strategic plan of the Association of Development Agencies (ADA), a national level Jamaican NGO, and in the work of some of its individual member agencies.⁹³ ADA is not a large secretariat but a collectivity of member agencies which undertake quite a number of functions by sitting on the Public Affairs, Membership and NGO Organisational Strengthening, Finance and Fundraising.

⁹¹ ADA and the CPDC are members of the NGO-World Bank Working Group (Wedderburn, interview, 1995).

⁹² ADA's members are: Agency for the Support of Individuals Starting Trade (ASSIST); Caribbean Council of Churches (CCC); Combined Disabilities Association (CDA); Groundwork Theatre Company (GTC); Mel Nathan Institute (MNI); Ms Judith Wedderburn; Ms Joan Ross-Frankson; Ms Marion Bernard; Projects for People (PFP); Roman Catholic Human Development & Social Justice Commission; Sistren Theatre Collective (STC); Social Action Centre (SAC); and Women's Resource and Outreach Centre (WROC). Canadian NGO members based in Jamaica are CUSO; Mennonite Central Committee (MNC); and Save the Children - Canada (CANSAVE) (ADA 1994g).

⁹³ For this section, it is necessary to note a methodological constraint. Except for ADA and CUSO-Caribbean, I was unable to obtain programme documents from ADA member agencies that were interviewed for this research project. Much of the information on these NGOs' programming is based solely on interviews. As such, I was not able to obtain the same detail of information about programming as I obtained from the progressive Canadian NGOs and ADA itself.

Communications, Networking, Education and Research and Documentation Centre Committees (Levy, interview, 1995; ADA 1994g).

In the next four years, ADA will be working to increase civic consciousness and problem solving capacities of social organizations at local and national levels; build member NGOs' capacity in the areas of governance, programming and financial management; provide long-term systematic analysis of global and macro issues and lobby with others for alternative strategies and mechanisms for sustainable development;⁹⁴ promote policy advocacy and representational work on certain social, cultural and economic policies; diversify ADA's funding possibilities; and support regional and international efforts to build a sustainable development paradigm and apply the learning from these efforts in ADA's own work in Jamaica (ADA 1995: 1). Within ADA programme documents, there is no explicit breakdown of programme activities based on gender considerations, although gender issues are discussed and analyzed in the various ADA newsletters.

In particular, ADA and its member agencies have undertaken a number of activities which reflect their priorities of building civil society and networks, promoting economic alternatives and undertaking policy advocacy. As part of its aim of promoting alliances between groups in the Caribbean and Central America, CUSO-Caribbean⁹⁵ is initiating a pilot project linking activists in

⁹⁴ This third goal was added after a review of the plan in 1994 (ADA 1995: 1).

⁹⁵ Much of CUSO-Caribbean's programme has been already discussed.

Bluefields, Jamaica and Bluefields, Nicaragua for joint activities on economic alternatives (CUSO 1994: 3; CUSO 1995: 16). CANSAVE is focused on integrated community development, poverty alleviation, networking and policy advocacy, particularly for child's rights (James, interview, 1995).

ADA and the Social Action Centre (SAC) have undertaken policy advocacy at the Jamaican government level on the issue of electoral reform.⁹⁶ The NGOs argue that combatting the current level of public cynicism in and withdrawal from Jamaican political affairs⁹⁷ and eliminating the often violent political partisanship, is one key to Jamaican development.

While no coup has been staged, and the army is not in control of Jamaica's affairs, there are those who argue that political partisanship is doing almost as much damage to Jamaica's prospects for democratic development...We need to become more aware of the link between the political and social and economic situation in Jamaica. It is not possible to build real consensus about an appropriate development strategy for the country, much less organize concerted action to solve the nation's problems, in light of the present mood of the people (ADA 1994a: 2)

As such, ADA and SAC are prioritizing "the importance of civil society and the involvement of civil society in governments...because it would help to

⁹⁶ ADA members recently made a submission to the Joint Select Committee of Parliament on constitutional reform and to both Jamaican political parties on this matter (Wedderburn, interview, 1995). ADA has lobbied for the nomination by NGO, church and community organizations of independent, not political, members to sit on the Electoral Advisory Committee, the establishment of a system of continuous voter registration and the elimination of patronage (ADA 1994a: 1).

⁹⁷ ADA notes that in Jamaica's last general election, half of the 1.2 million eligible voters did not vote and argues that it stems from lack of faith in either political party (ADA 1994a: 2). According to Stone (1994), traditionally 7 out of 10 Jamaican voters have actively exercised their right to vote in elections (1994: 88).

undercut the partisanship" (Levy, interview, 1995). In particular, ADA and its members have put forward recommendations for "the enshrinement of local government in our constitution where it is not enshrined already. Our enshrinement would specify certain rights and powers, duties and so on. Hopefully it will give the right to citizens for participation in local governments [and] not only citizens but their organizations" (Levy, interview, 1995). At the local level, ADA and SAC are working to build parish-wide associations of community organisations to participate in local governments (Levy, interview, 1995). ADA hopes that these parish networks will be the "first step in the re-establishment of a national association of community and civic organisations" as existed in pre-independence times in Jamaica (ADA 1994g: 4). Within the context of this strategy, the NGOs are working at changing not only the political dimension but working at changing attitudes and "emphasizing the people-centredness of the whole process, and the values of cooperation, as opposed to simple competition, of solidarity, of the collective over the individuals" (Levy, interview, 1995).

As part of their aim of promoting economic alternatives, ADA and SAC have been sponsoring research, public education fora and mobilization efforts to make Jamaican consumers aware of such alternatives to foreign borrowing and debt as domestic savings and investment and community revolving loan funds (ADA 1994a: 5; ADA 1994b: 8; ADA 1994e: 6; ADA 1995: 5). ADA is also supporting the establishment of a special fund for health and education from debt

relief as an alternative strategy to debt (ADA 1995: 6). Finally, ADA aims to support regional and international efforts towards a sustainable development paradigm by organizing public education for World Bank and IMF reform and solidarity work around Haiti and Cuba (ADA 1995: 5-7). ADA and the CPDC jointly organized a workshop on GATT and its implications for the Caribbean in October 1994. The workshop analyzed the GATT in terms of its emphasis on the service, not manufacturing and agricultural sectors; dependency caused by trade-related intellectual property rights; and declining standards of health and education (ADA 1994f: 5).

6.4 Progressive Canadian and Jamaican NGOs' Programming: Points of Convergence

The shifts in Canadian NGO programming in the Caribbean have certain implications, for Caribbean NGOs in general and local-level Jamaican NGOs in particular. At one level, as the above analysis has shown, there are important points of convergence between progressive Canadian and Jamaican NGOs' programming priorities. Following from a similar analysis of the problems facing the region, progressive Canadian and Jamaican NGOs are outlining similar strategies for action which focus on searching for and supporting alternative initiatives in the economic sphere. In addition, policy development and advocacy are promoted by both groups of NGOs. They are taking policy positions on debt, SAPs, free trade, GATT, World Bank/IMF reform and regional integration in national, regional and international fora. Finally, the strengthening of civil

society, the promotion of community groups in national decision-making processes and the building of networks and alliances are put forth as key priorities by both progressive Canadian and Jamaican NGOs.

These convergences in the programming priorities of progressive Canadian and Jamaican NGOs provide important points of conjuncture for integrated programming and create the potential for them to build solidarity networks at the programmatic level. However, as the next section will show, certain programming trends of progressive Canadian NGOs may undermine this potential by de-emphasizing Caribbean reality within progressive Canadian NGO programming. These trends are shifting the axis and scale of relations between progressive Canadian and Jamaican NGOs.

6.5 Progressive Canadian NGOs' Programming Trends: A Redefinition of the Caribbean's Place

There are three interconnected programming trends of progressive Canadian NGOs which have the potential to redefine the place in Canadian programming of progressive Jamaican NGOs. First, these Canadian NGOs are choosing to program thematically within the context of a consolidated Americas programme which integrates the Caribbean and Latin American regions. Theme-based programming is not problematic in itself and has the potential to be effective, if themes are broadly defined and incorporate the multiple realities and historical, cultural and geographic specificities of all the regions within a consolidated programme. However, my analysis shows that certain themes chosen

by Canadian NGOs are more firmly grounded in the specificities of the Latin American context which, in many ways, differs from the Caribbean context. This lack of attention to Caribbean specificities becomes particularly problematic, and interacts with my later analysis of participation in priority-setting and decision-making, when one looks at where and how these programming priorities are being set.

Second, when Canadian NGOs attempt to integrate their overseas programming with Canadian programming around issues of relevance to Canadians, like the NAFTA or GATT, Caribbean and Jamaican NGOs tend to be marginalized. Currently, Caribbean nations are excluded from the NAFTA; further, debt and SAPs, not trade, are Jamaican NGOs' primary focus since these issues most impact the lives of their constituents. Trade issues are more likely to be a point of programmatic conjuncture for Canadian and Latin American NGOs.

Third, progressive Canadian NGOs are choosing to direct most of their funds to umbrella groups in the Caribbean. These choices have the potential to weaken the survival of local-level NGOs and, by extension, the umbrella groups they are funding since, in the Jamaican context, member agencies often carry out the work of the umbrella organization.

6.5.1 Thematic programming

First, in the move to hemispheric programming organized around thematic priorities, Canadian NGOs are not only funding fewer Caribbean NGOs, they are

choosing themes which resonate with the Latin American context and marginalize Caribbean cultural and historical specificities. As Dorothy Hollingsworth of ADA notes, "When you look at an Americas programme, you have a Latin American focus more than a Caribbean focus"⁹⁸ (Hollingsworth, interview, 1995). This tendency to focus on the Latin American context is evident in Oxfam's theme of democratic rights and CUSO's theme of cultural affirmation of aboriginal peoples.

When addressing Oxfam's theme of democratic rights, it is important to note that corporate power is affecting the state of democracy throughout the hemisphere and democratic rights is not only a Latin American issue. Jamaican and Caribbean NGOs are dealing with democratic rights issues, but as will be shown, their emphasis is different than the issues which are prioritized for support in Oxfam's thematic programming.

In its Americas programme framework, Oxfam sets the context for its theme of democratic rights by noting that economic restructuring in the Americas has brought about changes in political structures. "While most countries have returned to constitutional and parliamentary systems, under economic restructuring, there are fewer and fewer areas where governments have the power to decide" (Oxfam 1995: 12). It goes on to say that clauses in free trade

⁹⁸ Oxfam-Canada itself recognized this tendency for Latin American concerns to dominate in a thematically-based Americas programme. It was acknowledged that "the Caribbean region would most likely be the region that could come off worse in a situation in which you say, 'regions aren't important in this Americas program.'" This was stated as one of the reasons that Cuba was chosen as the site of Oxfam's staff presence in the region (Hyett, interview, 1995).

agreements or boards of private corporations hold the real decision-making power over a nation's path of development and when citizens protest unliveable conditions, they are "repressed by well-financed police forces. Basic human rights are trampled" (Oxfam 1995: 13). Oxfam defines democratic rights in the following way.

Democratic rights mean the capacity for people, individually or through social organizations and institutions, to participate in social, political and economic policy-making, without fear of harassment (Oxfam 1995: 12).

By referring to the *return* to parliamentary systems of government, *repression* of popular protest by security forces and the violation of *basic human rights* and characterizing democratic rights in terms of participation in policy-making without *fear of harassment*, Oxfam has chosen a thematic focus which is grounded in the specificities of the Latin American context.⁹⁹

At this historical juncture, citizens and social organizations in Latin America operate within a more restricted "democratic" space than in the Caribbean where parliamentary and constitutional structures are well-established and people have traditionally exercised their political rights.¹⁰⁰ Currently in

⁹⁹ There is a similar tendency to hold up the Latin American context as the norm in discussions of popular movements and the perceived lack thereof in the Caribbean. See Tapper (1994: 6) for a discussion of the different historical and political experiences of the popular movement of each region. It is interesting to note that in the course of this research, two Canadian NGOs mentioned the lack of a popular movement in the Caribbean as a factor in their current programming decisions.

¹⁰⁰ See Stone (1994: 88) for a discussion of Jamaican democracy.

Jamaica, under the present PNP government headed by P.J. Patterson, Jamaican NGOs operate within a fairly open political space as the government is open and willing to listen to them.¹⁰¹ As Judith Wedderburn notes,

After a very long struggle, we've finally developed a fairly healthy relationship with the government. Recently there is an acceptance that NGOs have a role to play...Of course, we know we have to guard against being co-opted (Wedderburn, interview, 1995).

In Jamaica, the concept of democratic rights is an important issue but it is conceptualized in terms of challenging the decrease in national sovereignty due to the interventionist policies of the international financial institutions.¹⁰² In addition, as illustrated by ADA's policy advocacy and lobbying work discussed earlier, democratic rights are also conceptualized in terms of constitutional and electoral reform in order to reverse the alienation that Jamaicans have felt vis-a-vis "pork barrel" politics. Thus, the focus on democracy and democratic

¹⁰¹ For example, ADA has succeeded in getting an NGO desk at the Planning Institute of Jamaica, the technical advisory arm of government which works with multilateral and bilateral development agencies, and has gained a seat on the National Planning Council, chaired by the Minister of Finance. Two Jamaican NGO representatives were appointed to the official Jamaican government delegation to the 1993 CARICOM regional economic conference; as well, two Jamaican NGO representatives, ADA and the Council for Voluntary Social Services, were part of the official government delegation to the Social Summit in Copenhagen in March 1995 (Wedderburn, interview, 1995). In general, there has been significant improvement in the NGO-government relationship throughout the Caribbean region over the last two years (ADA 1994f: 4 & 9).

¹⁰² See Bogues (1994: 8) for a discussion of the need to redefine the traditional notion of sovereignty in the Caribbean as based on the Jamaican experience with the World Bank and the IMF.

development in the Jamaican context is centred more on arresting and reversing the erosion of traditional political participation than establishing what has not before existed, as in the Latin American context. Yet, if it is the latter concept of democratic rights which is prioritized without consideration of the historical specificities of the Caribbean context,¹⁰³ then the work of Caribbean and Jamaican NGOs may not be considered for support.

There is a similar potential problem with CUSO's thematic programming emphasizing Latin American specificities. One of the two major organizational themes of CUSO's Strategic Vision around which the agency's future work will be organized "specifically targets the cultural affirmation of aboriginal peoples in the context of sustainable human development" (CUSO 1995: 6). This theme of cultural survival, if interpreted narrowly, will not be reflective or inclusive of the Caribbean reality.¹⁰⁴ Chris Rosene notes that this organizational theme "is not going to be that significant in the Caribbean...if you say it's restricted to indigenous peoples who were in the regions before black people [and] white

¹⁰³This concern regarding thematic programming around democratic rights is acknowledged in Oxfam's Caribbean programme framework (1993). It talks of the need to ground "particular sectors or topics...in the specific realities of their regional environments" (1993: 25-6). However, within the Americas Programme (1994), this concern has not been carried forward and these specificities have not been spelled out thoroughly. In addition, when they are discussed, Caribbean realities tend to be restricted to the Cuban context.

¹⁰⁴ If the theme is taken to apply to only those peoples who were the first inhabitants of a region, it would not really be applicable in the Caribbean as the indigenous peoples of the region, the Arawaks, were almost completely decimated at the time of Spanish exploration and conquest (Ford-Smith 1989: 22).

people came" (Rosene, interview, 1995). Cultural survival in the Caribbean is understood to refer to the majority black population whose cultural values are being threatened by the motif of individualism inherent in the current model of globalization (Rosene, interview, 1995).

There are two potential problems for CUSO's Caribbean programme with a narrowly defined theme of cultural survival. First, it could force a shift in the nature of CUSO's Caribbean programme, a programme already planned after a lengthy participatory process. If CUSO's organizational theme of cultural survival is not interpreted more broadly to account for the Caribbean's reality, it could possibly "run counter" to the theme and activities of globalization-from-below outlined in the Caribbean regional programme (Rosene, interview, 1995).

Second, it could limit the potential of integrating Caribbean and Canadian programming. Linking overseas and Canadian programming is a priority for CUSO and the organizational theme of cultural survival will significantly guide CUSO's future programming directions and act as a link between Canadian and overseas programmes. One of the three entry points for CUSO's Canadian activities, within the larger organizational themes, is aboriginal rights. Canadian activities in this areas are centred on building links between aboriginal communities in Canada and Colombia, for example (CUSO 1995: 18-19).

In the case of both Oxfam-Canada and CUSO, the narrowly defined themes of democratic rights and cultural survival have the potential to limit the extent of Canadian programming in the Caribbean, and by extension the

opportunity to integrate the activities and analysis of progressive Canadian and Jamaican NGOs.

6.5.2 Focus on Trade Issues

In addition to these potential difficulties for the Caribbean within the context of a consolidated Americas programme, there is also the difficulty of "marrying three agendas" (Dunn, interview, 1995). Jamaican NGOs spoke of the challenge of working within a "Canadian focus agenda" and looking at issues from a Canadian, Latin American and Caribbean perspective while maintaining the Caribbean's agenda and interests (Dunn, interview, 1995).

Increasingly, progressive Canadian NGOs are seeking to link their overseas and Canadian programming around issues of mutual interest. Part of CUSO's mission is to "build alliances for social justice that relate to Canada" (Rosene, interview, 1995). As outlined by Oxfam, one of its objectives in relation to programme development is to "build a programme which reflects relevant issues of mutual concern to Canada, Latin America and the Caribbean" (Oxfam 1994: 17). Many of these issues of mutual concern are focused on the effects of free trade, GATT and economic restructuring in the hemisphere.

For example, Oxfam's theme of economic integration is grounded in the context of economic restructuring under SAPs and full integration into the NAFTA. Oxfam's objectives in relation to this theme are to formulate alternative models and policies to the dominant model of free trade, food export and health

and environmental degradation and build hemispheric networks in which Action Canada Network/Common Frontiers¹⁰⁵ are key participants (Oxfam 1995: 16). Oxfam's major new programme initiative 'Women: Changing the Terms of Trade' will be focusing on linking Canadian activities with those in Peru, Guatemala, El Salvador, Nicaragua and Cuba (Oxfam 1994: 35).

Progressive Jamaican NGOs argue that these issues of mutual concern, like free trade, GATT or economic integration, tend to be more of a concern in the Canadian and Latin American contexts. The Caribbean region has been marginalized in current hemispheric trade relations and left out of existing free trade agreements. While some progressive Caribbean NGOs are addressing these issues, others, particularly local-level progressive Jamaican NGOs, are concentrating on developing responses and alternatives to the debt and SAPs which still dominate the reality of their constituents.

Canadians are wont to deal more with things like GATT, debt, asking that our programmes kind of fit in with their programmes. The whole trade thing, now that they are part of the alliance with the States [and] with Mexico. Obviously, that's a priority for Canadian NGOs. It's a priority for us, too, but not as urgent¹⁰⁶ (Levy, interview, 1995).

¹⁰⁵ These coalitions are made up of Canadian and Mexican social organizations focused on challenging and creating alternatives to the NAFTA.

¹⁰⁶ This is echoed by Oxfam-Canada which notes that although Caribbean popular organizations are increasingly focusing on free trade and privatisation policies as embodied in the EAI and NAFTA, the debt crisis is still central to their programming (Oxfam 1993: 4).

It remains to be seen how effectively progressive Jamaican NGOs, particularly those at the local level, can integrate their programming around trade issues. At this point in time, organizing around NAFTA is more of a point of conjuncture between Canadian and Latin American NGOs and an issue around which Canadian NGOs can integrate their Americas and Canadian programming. This has potential implications for funding decisions which could leave Caribbean NGOs, particularly those at the local level, at a disadvantage.

6.5.3 Funding to Umbrella Organizations

Another implication of Canadian programming trends, particularly for local-level Jamaican NGOs, is that progressive Canadian NGOs are currently directing funding or are likely to direct funding¹⁰⁷ to umbrella groups which are addressing policy issues. Dorothy Hollingsworth of ADA comments, "Agencies from the North are now willing to fund umbrella agencies and, the member agencies of those umbrella agencies are receiving less funding. They are complaining and the umbrella is saying, if you don't fund the member agencies then we won't be an umbrella" (Hollingsworth, interview, 1995).

¹⁰⁷ As mentioned, CUSO's future array of partners has yet to be determined. However, one could speculate that CUSO's strategic emphasis on alliance-building and policy work, coupled with the fact that the agency has "increasing contact with umbrella groups, coalitions and networks" (CUSO 1995: 11), will mean that the majority of CUSO's future partners chosen will not be based on the ground or at the local level.

Umbrellas like CPDC and ADA,¹⁰⁸ which are receiving increased funding, are not channels for funding to their member agencies (Levy, interview, 1995). In the Jamaican context, this trend of directing funding away from local-level NGOs towards umbrella organizations becomes problematic at two levels.

First, the work of member groups at the local level adds credibility to the umbrella in its dealings with the Jamaican government (Wedderburn, interview, 1995). Second, member groups are often the engine that drives the activities of the umbrella organization. This is particularly the case with ADA whose member agencies essentially run the organization and take lead roles in its programming (Levy, interview, 1995). The Social Action Centre (SAC), as part of ADA's Public Affairs Committee, has been the lead agency in ADA's Freedom From Debt Campaign and other initiatives. However, SAC is no longer funded by Oxfam-Canada or Inter Pares. If ADA's activities are dependent on such member agencies, then increasing funds to ADA and decreasing funds to these members needs to be better rationalized. It could cause member agencies to fold or force them to take on less work, and ultimately, ADA's initiatives would suffer.

Thus certain aspects of progressive Canadian NGOs' programming trends are shifting the nature of their programming, and by extension, their relations

¹⁰⁸ ADA is viewed by its members as being in competition with them. ADA originally came together in the 1980s when member groups feared for their survival. "Today, the original threats are no longer there. This has left the umbrella feeling alienated; it has subsequently taken on a role which involves program management and is therefore seen to be competing with its member agencies" (ADA 1994d: 7).

with progressive Jamaican NGOs. The larger question to be examined then, is where and how these programming priorities are being set. To what degree were progressive Jamaican NGOs included in the process of priority-setting and given the opportunity to voice their concerns about programming specificities and funding directions? The next section will review the process of setting priorities by progressive Canadian NGOs.

6.6 The Process of Setting Programme Priorities

A review of the processes of how Canadian NGOs developed their programmes¹⁰⁹ indicates certain constraints within progressive Canadian and Jamaican NGO partnerships at the level of priority-setting and decision-making. At a conceptual level, mutual participation in priority-setting and decision-making is seen by Canadian and Jamaican NGOs as one key component of solidarity relations between Northern and Southern NGOs. Yet at the practical level, important constraints have limited the capacity of these progressive Canadian and Jamaican NGOs to engage in participatory processes of priority-setting. These constraints illustrate not only the difficulty of putting solidarity relations into

¹⁰⁹I recognize that I am following the tendency to look at North-South NGO relations as a transfer of power from North to South by focusing my attention on the involvement of progressive Jamaican NGOs in progressive Canadian NGOs programming and not vice versa. Progressive Canadian NGOs are not very involved in the development of individual Jamaican NGOs' three year programme cycles, except to say what they would like to see and what they can fund. As members of ADA, three Canadian NGOs are involved in the group consensus process of developing ADA policy (Murchie, personal communication).

practice, but the limitations of the traditional conceptual framework of participation within NGO partnership theory.

6.6.1 Conceptualizations of Partnership

At all stages we regard our partners as equals from whom we can learn and gain support for our efforts (CUSO 1995: 11).

Inter Pares establishes long-term, collaborative relationships with Third World NGOs, institutions and people's organizations, forging collegial relationships based on mutual support and the creation of a common agenda. Inter Pares relationships are characterized by communication, dialogue and mutual learning (Inter Pares 1995: 25).

As the above quotations indicate, the conceptualization of North-South NGO partnerships by the progressive Canadian NGO activists interviewed for this research project is rooted within the solidarity framework of partnership. During the interviews, these activists spoke of the ideal North-South NGO partnership as something more than just a financial relationship where the basis for relating would be grounded in "a shared agenda, so that as much as possible, you are moving away from this charity model and see it as a political alliance" (Hyett, interview, 1995). Focusing on the quality of the relationship, NGOs spoke of building relationships based on such components as "working with another group towards common goals" (Rosene, interview, 1995); "having a common understanding of what is important" and "collaborative action in a common context" (Seabrooke, interview, 1995); "mutual support and mutual learning"; "respect"; "trust"; "transparency"; and "openness about constraints" (Larbi,

interview, 1995). Mutual consultation and participatory decision-making were also identified by certain Canadian NGO members as key components of relations of solidarity between Northern and Southern NGOs. As Catherine Hyett notes, a "special relationship" between a Northern organization and Southern partners is "[A] relationship of mutual support and of mutual respect and where each would affect the decision-making processes of the other" (Hyett, interview, 1995).

The Jamaican NGO activists interviewed spoke to the issue of North-South NGO partnerships from a somewhat different perspective. Some did conceptualize partnership in terms of the solidarity framework and referred to the notion of common cause. However, arguing that North-South NGO partnerships have traditionally focused on "fixing things" and revolved around the notion of "sharing", one Jamaican NGO activist commented that this concept of sharing becomes difficult when "you are talking about money" (Dunn, interview, 1995). In general, there was a greater focus by Jamaican NGOs on the issue of funding and the implicit power/dependency relationship and assumptions of superiority that has tended to exist within the financial exchange from North to South.¹¹⁰ This perception of a power differential due to the financial exchange appears to be intimately tied to the perception, voiced by the majority of Jamaican NGOs interviewed, of Northern NGOs' tendency to "dictate the agenda."¹¹¹

¹¹⁰ It was interesting to note that certain Jamaican NGO members used the term "funder" to denote partner.

¹¹¹ Although generally the consensus in NGO circles and in the literature is that progressive NGOs have improved their participation record, in the Jamaican

What I think you should have is a partnership that is, in truth and in totality, a complementary partnership. Yes we may have the funding from the North, but [a complementary partnership is] not one where there seems to be a kind of dependency or almost a kind of replication of the colonial and subject relationship...we have sometimes the problem of some Northern NGOs dictating the agenda, we don't really get the feeling that we are partners equally in this process (Shaw, interview, 1995).

Jamaican NGOs emphasized that elements of "true partnership" exist when there is no condescension or top-down imposition of the agenda of Northern NGOs; interest in listening to the Southern partner; flexibility in terms of the use of funding; and respect for the "Caribbean view of how things should be done."¹¹² They equally emphasized the need for mutual respect and learning in a North-South partnership, particularly at the level of survival skills under structural adjustment where the North has much to learn from Southern experience.

The North-South relationship differs to the extent that the North is richer than we are, in terms of human and financial resources. We may be richer in some other respects in terms of some grassroots experiences that they don't have around some of the issues which are of concern to all. For example, our experience with debt has anteceded Canadian experience with debt. Canada is basically going through many of the same things, that we have gone through, so there are things to be learned (Levy, interview, 1995).

progressive NGO context and experience, the perception is that this is not entirely the case.

¹¹² Three Jamaican NGO activists mentioned that their partnerships with Canadian NGOs do embody many of these elements to a much greater degree than their partnerships with American NGOs.

Finally, participatory planning and Southern NGOs' participation in Northern NGOs' exercises of review and analysis were noted by three Jamaican NGOs as key to establishing a sense of equality in partnerships between Northern and Southern NGOs, particularly in a context where funding is being exchanged. As Jeff James, Country Director of CANSAVE, notes, "it involves this whole business of mutual respect, consultative approach, participation in whatever decisions are arrived at. Because you can very well have a situation where because you have the funds, you hold a big stick over the head of the organizations" (James, interview, 1995).

Progressive Canadian NGOs' conceptualizations of partnership are grounded in the solidarity framework and mutual participation in priority-setting and decision-making are identified by members of both groups of progressive NGOs as key to attaining this type of relationship. However, the next sections will outline the actual processes that took place and identify the constraints to actualizing this participation.

6.6.2 The Actual Processes: A Range of Experiences

Canadian NGOs engaged in a range of processes to determine the changing course of their Caribbean programming. These processes of priority-setting and decision-making included Jamaican partners to varying degrees. With the exception of the CUSO process, and the MATCH process to some extent, these processes cannot be characterized as participatory.

The former Caribbean programme officer for Oxfam acknowledges that the organization's process of planning its Americas programming was "not a perfect process" and that Jamaican NGOs were "not as integrated as they should have been rightfully" (Hyett, interview, 1995). The Oxfam exercise did not include Jamaican partners to any significant extent in the initial thinking around changes to Oxfam's Caribbean programming. "Mainly, it was, I would say, staff and volunteer-based fora, that moved the process along" (Hyett, interview, 1995). However, information about and reasons behind proposed changes were circulated in written documents and partners were consulted about these proposed changes and invited to comment on them when the Canadian programme officer went through the region (Hyett, interview, 1995; Levy, interview, 1995). As Hyett acknowledges, regarding Caribbean NGOs input into the process, "I would say that the main way that they were involved was, for the most part, indirectly" (Hyett, interview, 1995).

The process that Inter Pares went through was equally directed by Canadian staff reflecting on their work and relationships in the Caribbean and involving Jamaican NGOs in an indirect manner. In contrast to Oxfam, however, Inter Pares makes few apologies for this level of partner input in setting its agenda. This position is explained by Inter Pares' self-identification as a Canadian social justice organization, which is actively working in its own Canadian context with its own agenda and priorities and engaging in relationships with other social justice organizations which share their agenda and priorities

(Seabrooke, interview, 1995). As with Oxfam, the Caribbean programme officer from Inter Pares did go through the Caribbean region and dialogue with Caribbean partners about the proposed changes to the agency's Caribbean programme (Hcllingsworth, interview, 1995; Seabrooke, interview, 1995).

MATCH-International did consult current and past partners and women who know of MATCH's work when formulating its strategic plan for 1994-1999. In addition to meetings and phone conversations, MATCH used a questionnaire to ask partners about their changing context and whether MATCH's priority themes of the elimination of violence against women, and women and sustainable human development from the 1990 strategic plan were still relevant and desired. These partners responded that the themes should continue to be the focus of MATCH's programming and should continue to be broadly defined (Larbi, interview, 1995). Larbi argues that the content and process of setting priorities laid out in the strategic plan is in keeping with MATCH's mandate.

We started off by saying that in order to be effective, we had to be doing what was needed, what was wanted and that women are capable of defining those needs and capable of planning strategies for change and that our role would be to support them as far as was possible in doing so. The strategy plan was not a great diversion from who we are and the way we operate (Larbi, interview, 1995).

CUSO carried out the most participatory process of research, consultation, review, reflection and decision-making in the development of its four year plan for the Caribbean. Jamaican and Canadian CUSO staff characterized this process as "pro-active, participatory and responsive to partners' needs" (Dunn, interview, 1995) and one in which "partners were quite involved" and "there were a lot of

perspectives" (Rosene, interview, 1995). From the outset, many groups were declared as having "a right or a responsibility to participate in the review/reflection process and shape the final decisions"¹¹³ (CUSO Jamaica 1993: 2).

The entire eleven month process had to be carefully managed and monitored to ensure that it reflected the expressed objectives of ensuring relevance to, and meaningful participation by, people in the region, Coastal Central America and Canada (CUSO Jamaica 1993: 3).

The CUSO process, which unfolded from January to December 1993, included: a research piece about globalization as the basis for a July 1993 workshop; a field survey of partners in the Caribbean region and coastal Central America to discuss the main issues from the workshop and CUSO's future programme; and a December workshop to determine the main issues and priorities, responsible agents and timelines for the four year plan (CUSO-Jamaica 1993: 2-6).

¹¹³ These participants were the Caribbean and Canadian staff of CUSO, the CUSO Caribbean board member, the Caribbean Regional Advisory Committee, partner agencies in the region, cooperants, individual and agencies involved in development activities in the region, Costa Rica and Nicaragua, and allies of CUSO (development thinkers, activists and academics) (CUSO Jamaica 1993: 2).

6.6.3 Constraints to Participation

By examining the experiences of Canadian and Jamaican NGOs, a number of institutional constraints to mutual participation in processes of priority-setting and decision-making may be identified.

One key constraint is the lack of permanent staff presence in a region. In a regional field office, staff are able to establish meaningful contact with partners and devote their time to program- not administration-related activities, unlike Canada-based program staff.¹¹⁴ Annual regional visits by Canada-based programming staff are usually reporting or networking sessions, situations of playing catch-up and not opportunities for substantive consultation.

Funding is another constraint. When NGOs have increasingly scarce resources, it is difficult to justify the great expense of international level consultation, particularly if it means that less funding is allocated to overseas programming. In addition, a democratic consultation and decision-making process adds another layer of work to already overworked NGO staff members. This is particularly the case if the staff person is working in a national organization which has its own internal democratic processes of decision-making involving Canadian members from across the country. Further, communication can also be a constraint in that it is difficult and expensive to reach partners in

¹¹⁴ This was identified by Catherine Hyett of Oxfam-Canada as a constraint. Oxfam-Canada's process of priority-setting in Central America where Oxfam maintains a field office had a much higher degree of partner participation than its Caribbean process (Hyett, interview, 1995).

remote places. Finally, staff changes can have an indirect effect on limiting participation in priority-setting and decision-making, especially when the commitment to some NGO relationships is very much invested in the particular personality and history of a staff person. Lack of staff continuity means the loss of corporate memory in terms of priorities and knowledge about partners, their context and views on the relationship and their role in it.

Even when participatory consultation does happen, weaknesses can occur in the process of consultation if there are not mechanisms in place to ensure that input is taken seriously and followed-up. Southern NGOs may participate in Northern NGOs' organizational consultations but never see their input implemented. Further, if the organization is a Southern agency in an international family that relates to the head agency in a hub and spoke arrangement, there is often no room for South-South consultation or follow-up on issues raised at organizational conferences. One mechanism put in place by the CANSAVE family of organizations to facilitate South-South consultation and follow-up are annual regional meetings in between organizational meetings every two years.

Finally, even when the desire and mechanisms for meaningful participation are in place, Canadian organizational priorities of survival, strategic use of scarce resources and identity as a Canadian social justice organization may take precedence over the quality and outcome of partner participation. For example, Oxfam-Canada talks of incorporating partner input in a "meaningful and

economically feasible way in programme definition and implementation" (Oxfam 1994: 18). How partner participation can be both meaningful and economically feasible is not spelled out.

Priorities for those located at the ultimate levels of NGO decision-making also effect the outcome of a participatory process. As is the case with CUSO,¹¹⁵ even when there has been a highly participatory process in determining Caribbean programming, the outcome will be potentially altered because the organizational strategic vision which will guide future CUSO programming, emphasizes different or narrowly defined themes and directions than the regional vision (Rosene, interview, 1995).

Conclusion

This case study has a number of implications. First, it shows that NGO partnerships do not exist in a vacuum and cannot be analyzed as such. Any study of progressive North-South NGO partnership must look at the particular political-economic and institutional context in which NGO relations are embedded. Progressive Canadian NGOs' analysis of the dominant development model in the hemisphere and their programmatic response to this model, as well as their own institutional reality of increasingly scarce resources, are redefining relations

¹¹⁵ It is interesting to note that this four year planning process, which was to be a pilot project for formulating CUSO's other regional plans, will not be continued in this form, but on a year by year basis, because "the organization is involved in its own survival" (Rosene, interview, 1995).

between progressive Canadian and Jamaican NGOs. The choice of partners that prioritize policy development and advocacy and operate at a regional level is very much linked to progressive Canadian NGOs' analysis of the current political-economic context and what kind of partnership is needed to best carry out their response to this context.

Second, this case study highlights the necessity of incorporating a broad range of perspectives, experiences and analyses into NGOs' programme planning in order to achieve effective programmes which are grounded in the multiple realities of all the regions represented in the programme. My review of Canadian NGOs' programme priorities suggests that the trends of consolidating Americas programming around narrowly defined themes of democratic rights and cultural survival; linking Canadian and overseas programming around trade issues; and directing funding towards umbrella NGOs are de-emphasizing the specificities of the Caribbean region in favour of an emphasis on the Latin American context.

Third, the range of processes engaged in by the Canadian NGOs illustrates that, in practice, participation by Southern NGOs in Canadian NGOs processes of priority-setting and decision-making varies according to activities, quality and outcome. In other words, this case study indicates that participation has many specificities and a conceptual framework of participation must reflect these specificities.

At one level, participation is made up of a range of activities in a process. These activities may range from indirect input (as was the case with Oxfam and

Inter Pares) to direct consultation on themes (as was the case with MATCH) to direct participation from the beginning in programme planning, consultation, workshops and final strategies (as was the case with CUSO).

As the CUSO participatory planning experience indicates, the range of activities chosen directly relate to the quality and outcome of the participation. The research, survey and workshop activities carried out in the CUSO process were designed to build upon one another and each activity fed into the process of the next. Other factors crucial to developing the element of quality in CUSO's participatory process include: time, both temporally and in terms of staff effort; space for review, resolution of differences and feedback; commitment to the process; a sense of right, and responsibility to participate by all parties both North and South; regional presence and credibility with local partners; and leadership.

The outcome of the participation may be seen as related to the effectiveness of the final programme planned, as well as the impacts on the work and skills of the participants themselves. CUSO's participatory process had important multiplier effects in that its workshops not only gathered information for CUSO's programme plan, but generated learning-oriented spin-offs throughout the region. Students and media accessed the workshop results and workshop participants used the information to develop their own workshops (CUSO-Jamaica 1993: 4).

Fourth, it cannot be assumed that progressive Northern and Southern NGOs automatically practice solidarity relations or engage in participatory

relations of priority-setting and decision-making, even if they indicate an ideological or philosophical commitment to solidarity and participation in NGO relations. A range of constraints, both internal and external, limit the capacity of progressive Northern NGOs to practice participatory relations with their Southern partners. Geographical distance and the lack of regional presence, funding, staff time and continuity all restrict the capacity of progressive Canadian NGOs to engage in a range of participatory activities. Northern NGO organizational priorities also constrain the quality and outcome of participation. As shown, Canadian NGOs' organizational priorities of institutional survival and allocation of resources to programming means that consultation must be economically feasible. In addition, as is the case with CUSO, Canadian NGOs' ultimate organizational vision may restrict the programmatic implementation of the results of a participatory process. These constraints identified, as well as the specificities of participation noted, contribute to a more nuanced conceptual framework of participation within North-South NGO partnership theory.

Fifth, these findings also have implications for progressive Northern NGOs. A multilayered practice of participation has two impacts. On the one hand, participation is desirable as an end in itself and as a key component in establishing a footing of equality in the North-South progressive NGO relationship. This is particularly crucial when, as in the Jamaican context, progressive Jamaican NGOs do perceive a power differential in the relationship. On the other hand, participation is useful in the long-term in that it contributes to

more effective programming. Better programming decisions are made by accessing a wide range of perspectives and ideas, and greater accountability for programming decisions and actions is achieved. It also contributes to increased capacity-building at the level of skills and programme development for Southern partners by enabling them to reflect upon and analyze their own work in the process of participating in a Northern's partners process. Finally, it enables the programme to be grounded in the particular historical, geographical and cultural specificities of the participants.

These findings suggest that progressive NGOs face many constraints in engaging in participatory relations at the level of priority-setting and decision-making. However, many of these constraints are institutional and if the institutional will is there, they can be overcome. Progressive NGOs need to follow such examples as the Katalysis Foundation and build an organizational commitment to the notion of a participatory process, both for establishing equality in the North-South NGO relationship and in creating more effective programmes.

Chapter 7: Conclusion

In a true partnership we have to work with each other in a kind of relationship which accepts without question the realities of all experience, makes the issues arising an integral part of the general agenda, and seeks to address them by analyzing the power relations at work and finding new ways of relating that take us step by step closer to a new order based on equal rights and justice (French 1991: 9).

The words of Joan French contain two important messages which bring closure to this thesis. On the one hand, she argues that partnership needs to be redefined to reflect the notion of process, to value all partners' experiences and to openly address power differentials. On the other hand, she suggests that finding new ways of relating between Northern and Southern NGOs offers possibilities for new ways of relating at the global level. In this thesis, I explore how Canadian and Jamaican NGOs, which advocate French's notion of partnership, are engaging with each other, at the practical level. I argue that mutual participation in priority-setting and decision-making is a key factor in establishing parity and creating effective programmes in partnerships between progressive Northern and Southern NGOs. I find that, due to the institutional and political-economic context in which NGO partnerships exist, there are important constraints to this participation which limit progressive NGOs' capacity to engage in relations of solidarity.

In Chapter 2, I outline the methodological foundations of this research project. From the outset, I wanted my research process and methods to embody the notion of openness, subjectivity and equality advocated in French's concept of

true partnership. I looked to participatory and feminist research for suggestions on how to carry out such a project. In this chapter, I highlight the theoretical foundations and practical components which inform participatory and feminist research, and the methods I chose to conduct my particular process.

The narrative of the actual research process sketches my exceeded expectations and limitations in actualizing a feminist participatory research project. The participatory elements could have been strengthened with more time, greater proximity to Jamaican NGOs and the opportunity to volunteer or work in one of the NGOs. The constraints I faced in carrying out a participatory research project are many of the same constraints which limited the extent of participatory relations among progressive Canadian and Jamaican NGOs. These common limitations reinforced my conviction that research about NGOs, like relations among NGOs themselves, is embedded within a particular personal and external context and that this context needs to be understood.

I can say that my research is both participatory and feminist in that the process was characterized by openness, flexibility and an explicit attention to my personal context and the political context of North-South NGO relations. In addition, the content incorporates the concepts of gender and power. Further, the final product potentially contributes to the processes of reflection and review of the NGOs which participated in the research.

In Chapter 3, by reviewing the changing discourse of development and participation by the World Bank and CIDA, I examine how NGOs have come to

be viewed as key actors in promoting sustainable, participatory development. NGOs are considered for this central role on the basis of their ability to reach the grassroots, decentralized delivery methods, innovation and cost-efficiency. However, I argue that this discourse conceptualizes NGOs as an homogenous group of actors which embody neutral and apolitical qualities. This myth of the NGO community conceals such important points of divergence among NGOs as their level of politicization and approach to participation.

Analytical frameworks which distinguish among NGOs on the basis of programming strategies, strategic orientations, philosophies toward development and gender are useful to begin to understand some of these differences. More recent conceptual frameworks, which differentiate between progressive and conventional NGOs by focusing on the integration of NGOs' respective programming strategies, power agendas and approaches to participation, are more useful in clarifying key differences among NGOs. They also provide the basis for examination of North-South NGO relations since they do not extend their analysis to determine whether progressive and conventional NGOs conceive of and practice participation differently in the North-South NGO partnership context.

In Chapter 4, I examine the two main conceptual frameworks of North-South NGO partnership: the reformist and solidarity frameworks. I argue that the reformist framework is grounded in the assumptions of the charity model. These assumptions shape its conceptualization of partnership as an hierarchical, conditional and contractual relationship. By contrast, I argue that the solidarity

framework is embedded in the assumption of co-responsibility. This has inspired a redefinition of partnership as an equitable, mutualistic and process-oriented relationship.

The reformist framework's strength is identifying operational constraints to partnership and the solidarity framework's strength is addressing the power relations at play in North-South relations and redefining the ways that NGOs traditionally have related to one another. Despite these respective strengths, the conceptual framework of participation at the North-South NGO level is not adequate in either of these discourses of partnership. The gaps in these frameworks of partnership suggest that a useful analytical framework of NGO partnership must integrate analyses of the operational and political dimensions of North-South NGO relations in order to adequately examine the practice of participation within these relations. Such a framework must also be grounded in an analysis of the particular political-economic and institutional context in which the NGO partnership is embedded.

In Chapter 5, I outline the broader political-economic context of relations between progressive Canadian and Jamaican NGOs. I argue that the principles of trade reciprocity and poverty reduction in the Canadian government's foreign policy discourse are contributing to a restructuring of Canadian-Caribbean relations, particularly at the level of their aid relationship. CIDA programming in the Caribbean is being restructured at the administrative, funding and policy levels. The Caribbean regional development model prescribed by CIDA and the

international financial institutions focuses on measures to increase the region's competitiveness, liberalize trade and privatize. In essence, the desired outcome of this restructured programme is a reduction of the region's aid dependency and promotion of reciprocity in trade relations with Canada.

Within CIDA's regional policy framework, NGOs are promoted as key vehicles to promote this economic transformation in the Caribbean. However, progressive Canadian and Jamaican NGOs have a different agenda and a different understanding of their role in the Caribbean region. They are emphasizing a search for alternatives to the dominant neoliberal model of hemispheric development and are forming networks and coalitions in order to connect this search for alternatives at the micro-level with policy change at the macro-level.

In Chapter 6, I analyze how progressive Canadian and Jamaican NGOs are engaging in this broader context by examining their programming priorities for the region and how they are engaging with each other by examining the process of setting these priorities. Progressive Canadian NGOs are moving away from programming along geographic, to thematic lines, and are consolidating regional programmes within one Americas programme. They are prioritizing policy development and advocacy and are supporting Caribbean partners who are doing the same. Within the context of a consolidated Americas programme, none of these programming choices raise potential problems if they are grounded in the varied realities of the different regions represented in the programme. However,

I found that certain of the progressive Canadian NGOs' programming choices -- narrowly defined themes, focus on trade, and funding umbrellas -- do not appear to be grounded in Caribbean or Jamaican specificities to the same extent as they reflect Latin American realities.

By examining the processes of determining these programming priorities, I conclude that they could not all be categorized as participatory and that the practice of, and constraints to, participation incorporates many specificities. These specificities relate to the range of activities, quality and outcome of the participatory process. The constraints relate to funding, time, regional presence, staff effort and continuity and the Northern NGOs' own organizational priorities. I argue that participation in programme priority-setting and decision-making in North-South progressive NGO relations is important because it creates the potential for more equitable relations in which power is shared. Its implementation may also contribute to more effective programming due to more perspectives given, broader accountability achieved, regional specificities acknowledged and capacity and programme development of Southern NGOs strengthened.

It is my hope that these research findings contribute to the creation of a clearer conceptual framework of participation within the solidarity framework of North-South NGO partnership. However, this research is a preliminary attempt at exploring this area of study. My findings lead to the identification of future research which needs to be done in order to carry this argument forward. One

future research project would be to compare the effectiveness of programming of progressive NGOs which have engaged in a mutual process of programme planning to programming which has been planned solely by the Northern NGO. Another would be to examine the impacts on capacity development and programming of progressive Southern NGOs which have been involved in a mutual process of programme planning. A final research project could attempt to identify best practices and mechanisms for implementing participatory relations between progressive Northern and Southern NGOs.

Analysis of these questions would take up French's challenge to explore new ways of relating between Northern and Southern NGOs. It would equally contribute to a greater understanding, for theorists and NGOs alike, of the complexities and challenges of North-South NGO relations in a world that grows more complex and challenging each day.

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Appendix 1

Questionnaire for Canadian NGOs

NGO Partnerships

- * How does your organization define partnership?
- * What would an ideal North-South NGO partnership look like?
- * How would this ideal partnership be operationalized?
- * What are the constraints to achieving such a partnership?

Caribbean Programming

- * Describe your organization's current Caribbean program.
- * In what ways has this changed from past Caribbean programs?
- * What were the reasons for this change(s)?

Process of Priority-Setting in the Caribbean

- * Describe your organization's process of restructuring its Caribbean program.
- * What actors were involved?
- * What role did Jamaican partners play in the process?
- * How would you characterize their level of participation in this process?
- * How would you characterize their level of decision-making authority in this process?
- * What constraints exist to their participation in such processes?

Canadian-Caribbean Relations

Canada and the Caribbean have historically enjoyed a "special relationship".

- * In what ways has this relationship changed?
- * What are the reasons for these changes?

Jamaican NGOs

- * Which Jamaican NGOs are you in partnership with currently?
- * How do these particular relationships fit into your overall programming strategy for the Caribbean?
- * What opportunities do these relationships offer your organization?

Appendix 2

Questionnaire for Jamaican NGOs

NGO Partnerships

- * How does your organization define partnership?
- * What would an ideal North-South NGO partnership look like?
- * How would this ideal partnership be operationalized?
- * What are the constraints to achieving such a partnership?
- * How do your partnerships with Northern NGOs differ from those with other Southern NGOs?

Canadian-Caribbean Relations

Canada and the Caribbean have historically enjoyed a "special relationship".

- * In what ways has this relationship changed?
- * What are the reasons for these changes?
- * What are the key issues facing the Caribbean, currently?
- * How has your organization responded to these issues?
- * What are your priorities in the Caribbean?

Process of Priority-Setting in the Caribbean by Canadian Partners

- * In what ways are Canadian NGOs' priorities in the Caribbean changing?
- * What effects have these changes had on your organization?
- * What role did your organization play in the process of priority-setting by Canadian partners?
- * How would you characterize your level of participation in this process?
- * How would you characterize your level of decision-making authority in this process?
- * What constraints exist to your participation in such processes?

Canadian NGOs

- * Which Canadian NGOs are you currently in partnership with?
- * Why did you enter into this partnership?
- * What opportunities do these relationships offer your organization?

Appendix 3**RESEARCH PROJECT PROPOSAL
SUBMISSION TO THE CARLETON ETHICS COMMITTEE**

Project Title: Strategies for Partnership: An Analysis
of Changing Canadian-Caribbean NGO
Relations

Principal Investigator: Pari Johnston, M.A Student
Norman Paterson School of International
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The purpose of this thesis is to explore and analyze the effects of the trend towards regional programming in the Caribbean by the Canadian International Development Agency (CIDA) and certain Canadian non-governmental organizations (NGOs) on the practice of partnership with Jamaican NGOs. More specifically, I am interested in examining the forces of change behind some Canadian NGOs' shifting agendas and "strategic choices" in the Caribbean and the implications of these choices on Canadian-Jamaican NGO relationships.

Those Canadian NGOs currently involved in Jamaica (approximately 11) will be contacted and a smaller number of these (approximately 4-6) will be chosen from those expressing interest in participating in the project. Five Jamaican NGOs who have entered into partnerships with Canadian NGOs will also be contacted as I hope to do two weeks of fieldwork in Jamaica in mid-February 1995. I will be contacting Jamaican NGOs by letter, independently of their Canadian NGO partners. All groups contacted will be given complete information as to the purpose of this project, as well as consent forms (see attached copy) and other relevant information.

During this project, interviews will be carried out with key personnel at each Canadian NGO. Key personnel will likely include, but are not limited to, Executive Directors (or equivalent) of each organization, the program officer (or equivalent) for the Jamaica (or Caribbean program) and any other personnel

within the organization with interest and/or experience in the following areas: Jamaica/Caribbean programs, Caribbean regional issues, CIDA-NGO relations, partnership development, the discourse of partnership or other related topics.

Interviews will also be carried out with key members of each Jamaican NGO which would include Executive Directors (or equivalent), the Canadian liaison officer (or equivalent) and any other personnel within the organization with interest and/or experience in the following areas: Jamaican-Canadian NGO relations, Caribbean regional issues, North-South NGO conflict, South-South NGO relations, partnership development, the discourse of partnership or other related issues.

I plan to follow a semi-structured interview format by asking a series of open-ended questions organized in a thematic manner. The purpose of this interview process is to gain an understanding of NGOs' different conceptions of partnership; discuss their practices of decision-making and priority-setting and actual and/or potential conflicts between organizations over these issues; and get a sense of their assessment of the Caribbean region, their views of its future directions and the role of Canadian and Jamaican NGOs in influencing the directions taken. I have attached a list of possible questions to be asked, though others may arise during the research process.

The information gained through this qualitative research will be supplemented by content analysis of such NGO materials as: annual and periodic reports, strategic planning exercises, evaluation reports, internal discussion papers, general mission and/or policy statements, financial statements, general programming documents and other relevant materials made available to me.

All those who choose to participate in this research will have the option of full confidentiality and/or anonymity, if desired, as well the freedom to withdraw from the project at any time. At completion, all participants will have access to the results of the research project which will be written in a manner which ensures that all confidentiality and anonymity requests are respected.

CONSENT FORM

Project Title: Strategies for Partnership: An Analysis of Changing
Canadian-Caribbean NGO Relations

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Tel: (613) 567-5960

The purpose of this research project is to explore and analyze the current forces of change behind some Canadian non-governmental organisations' (NGOs) shifting agendas and priorities in the Caribbean and the implications of these changes on Canadian-Jamaican NGO relationships. Signing this form signals consent to participate in an interview (or possibly interviews) with the researcher.

Interviews with key participants are intended to provide general information about Canadian-Jamaican NGO relations. They will include an examination of NGOs' different conceptions of partnership, their practices of decision-making and priority-setting and their assessment of the Caribbean region, its future directions and the role of Canadian and Jamaican NGOs in influencing the directions taken.

Participants have the option of requesting that any or all information given remain fully confidential and/or anonymous and the freedom of refusing to answer any or all questions and withdrawing from the project at any time. At the time of its completion, all participants will have access to a summary of the research results.

Should you require any further information, please contact Pari Johnston at the above address. You may also contact the supervisor of this research project, John O'Manique, Professor, Norman Paterson School of International Affairs at Carleton University (Tel: (613) 788-2600, ext. 6670). Should you have any complaints, please call Maureen Appel Molot, Director, Norman Paterson School of International Affairs at Carleton University (Tel: (613) 788-2600, ext. 6658).

I, _____, have read the above, and give informed consent to my participation in this project.

Signature: _____ Date: _____

Organization: _____

Signature of researcher: _____ Date: _____

END

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